





FEDERATION OF  
CALGARY COMMUNITIES

# **Continuity / Succession Planning for Volunteer-run Organizations**

Nov. 2, 2019



## WORKSHOP OBJECTIVES

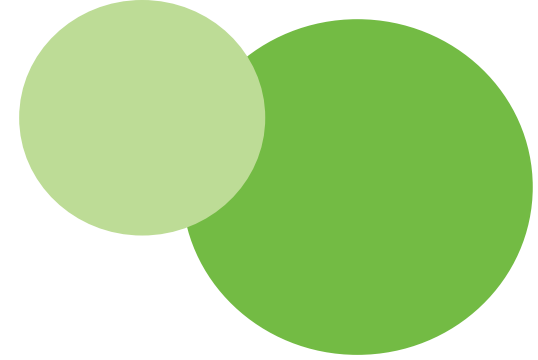
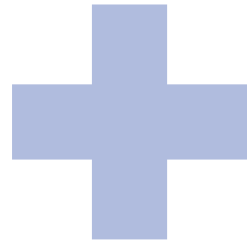
- Identify board role and responsibilities in ensuring the continuity of volunteer-run non-profit organizations
  - Discuss intentional board volunteer recruitment strategies and solutions to recruitment challenges
  - Identify the benefits of creating a succession plan and review the steps to developing a succession plan
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# CONTINUITY FOR VOLUNTEER RUN ORGANIZATIONS

Planning for continuity is essential to your organization's ability to sustain itself and continue to thrive over time.



# Tools for Organizational Continuity



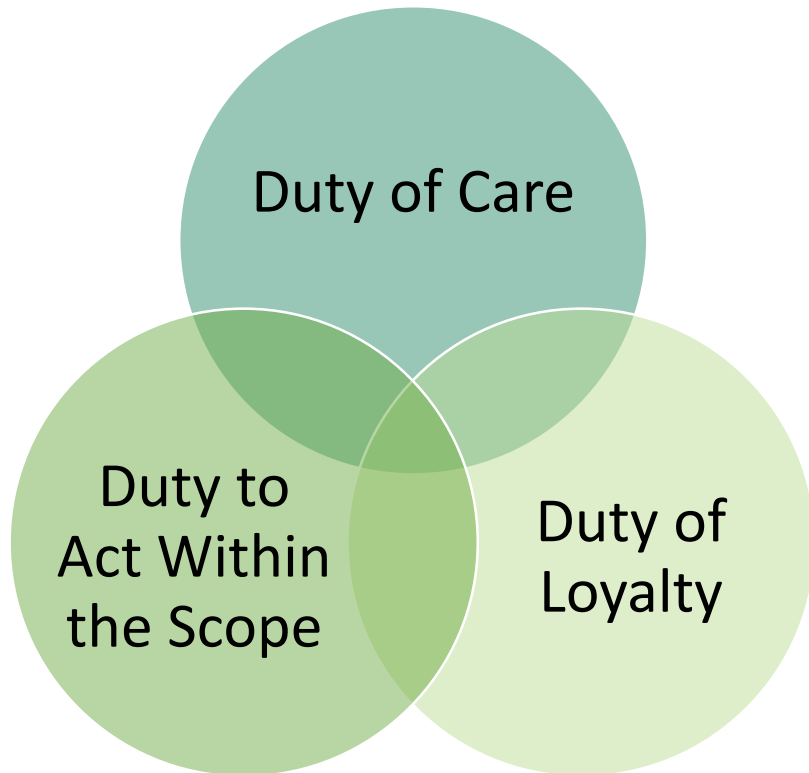


## **Imagine**

- You ask a volunteer to join the board and they say YES the first time you ask
- You are no longer 3-5 people doing all the work, because you have a full board and successors lined up
- You are already training people in advance to take over key positions

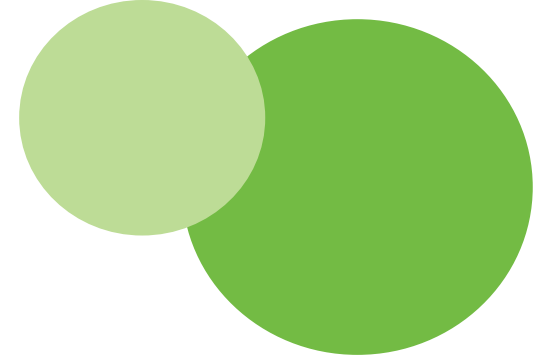
# Board Role & Responsibilities in Organizational Continuity

## Fiduciary Duties



- ✓ Board members' fiduciary duty is to oversee the organization with the highest standard of care and diligence – including the long-term continuity of your organization

# What is Volunteer Recruitment & Succession Planning?



**Volunteer Recruitment** - the process of finding the right volunteers to meet your organization's volunteer needs.

**Succession Planning** – an ongoing process for organizations to identify and develop capable and skilled leaders, who can fulfill key roles when they become open. It considers existing organizational needs and future strategic direction.

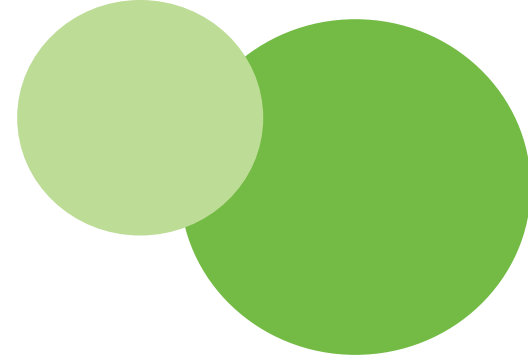




## **Activity: Welcome & Introductions**

In pairs, introduce yourself to your partner by sharing:

- Name
- Role
- Organization
- A challenge your organization is experiencing in board recruitment or succession planning





# VOLUNTEER RECRUITMENT – GET PEOPLE FIRST!



**Volunteers  
Needed!**

## Be Intentional in How We Recruit Board Volunteers

**Intentional Volunteer Recruitment**—planning *how* to recruit before you **do it**, so you can be strategic in using the right approach and the most effective methods for each approach. This increases your success in inspiring people to join your volunteer board.

# Volunteer Continuum



- Short-term event volunteers
- Project-based or skill-based volunteers (e.g., research for a policy)
- Volunteer annually for specific activity (e.g., casino volunteer)

- Volunteer on a consistent basis for regular programming (e.g., monthly potluck coordinator; community garden volunteers)

- Board & committee members responsible for the strategic direction and operational activities (e.g., vice-president, communications committee member)

# Targeted Recruitment Approach for Board Positions

## Targeted Approach

- Finding individuals with specific skills, experience and characteristics
- Works best for medium to high risk leadership positions

## Generic Approach

- Allows you to make a public appeal to a wider audience
- Works best for low-risk positions that do not require specific skills (e.g., episodic and program volunteers)



# Generic Approach

## Episodic & Program Volunteer Recruitment Methods

- Ask org. members, community members, family, friends, or a friend of current volunteer
- Have printed task lists, volunteer schedules, job descriptions, and postcards ready at your organization's events and activities / make announcements
- Mass media: website, social media, newsletters, bulletin boards
- Promote an episodic volunteer from your volunteer database/ list
- Use plain language and communications material that shows and relates to the diversity of your community
- Info. booths at community events you do not host (e.g., farmer's markets, local festivals)
- Connect with education institutions and businesses that have student/ staff requirements to volunteer
- Contact local volunteer centres (Youth Central, Volunteer Central, senior centres, etc.)
- Connect with volunteer matching websites

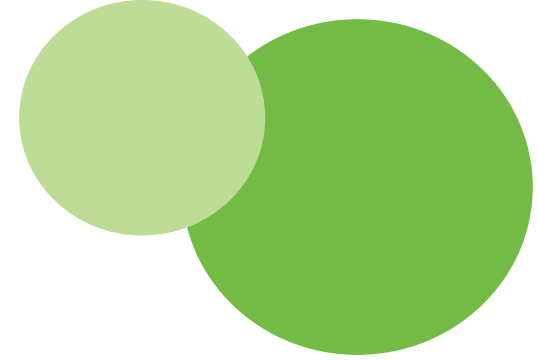


## Leadership Position Recruitment Methods

- Personal direct face-to-face asks to existing volunteers and community members
  - Clear job descriptions and quick follow-up to responses
  - Get to know members; encourage them to volunteer for leadership roles
  - Engage people with diverse backgrounds, perspectives, and life experiences
  - Host some fun meetings that are open to your community, introduce new people who attend and make them feel welcome
  - Offered options of involvement; don't overwhelm/pressure potential leadership volunteer (can encourage volunteers to start as an episodic or program volunteer)
  - Ask keen supporters who may not be members or volunteers yet
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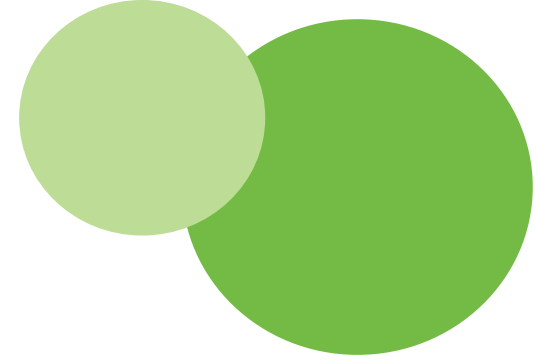
Are there additional successful board recruitment strategies people recommend for this list?



# Benefits of Intentional Volunteer Recruitment

- Find people that fit the board position(s) and your organization's volunteer needs
- Can create volunteer recruitment roadmap that multiple people can work together on
- Supports volunteer transitions & succession planning





Whose job is it?

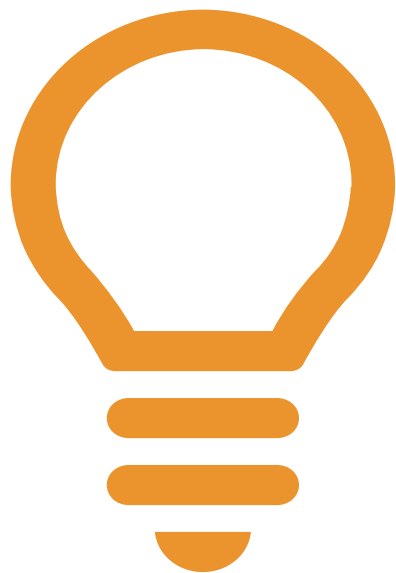
**Volunteer  
Director**

**Board  
Committee**

**Program  
Leaders**

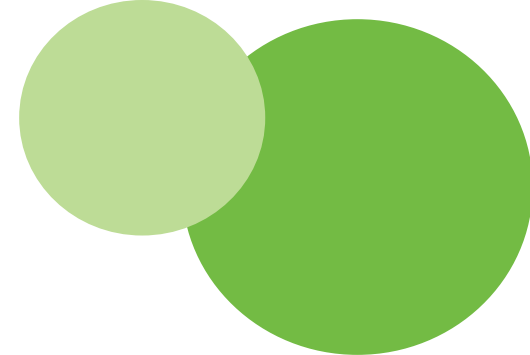
**Combination**





## Think About it...

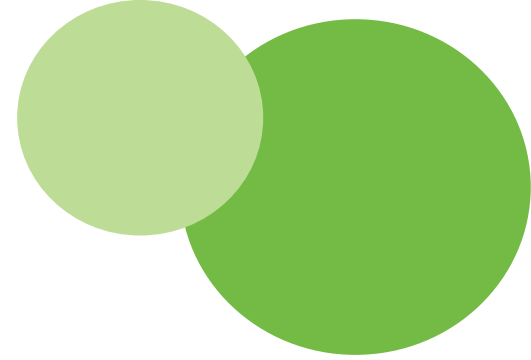
You will **recruit more people**, and **faster**, which can **build your resources and capacity** if you start by dedicating one person's role to volunteer recruitment.





## Discussion

- Who is responsible for volunteer recruitment in your organization?
- How can you dedicate organizational resources to volunteer recruitment?



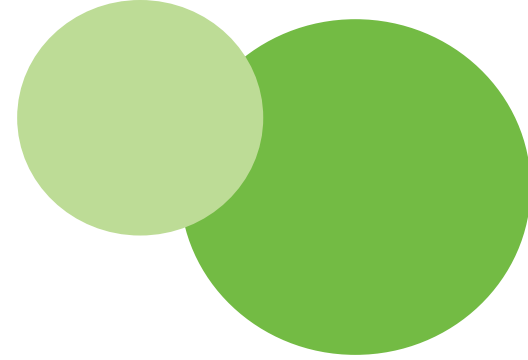
# Common Recruitment Challenges & Solutions

Common Recruitment Challenge	Solutions
<b>Receive a lot of “No’s”</b>	<ul style="list-style-type: none"><li>• Clear job descriptions that outline responsibilities, expectations and time commitment</li><li>• Are you asking existing volunteers or community leaders who are passionate about the organization’s mission?</li><li>• Is your ask personable? Did you get to know the person first?</li></ul>
<b>Volunteer has a personal agenda that does not align with organization's mission</b>	<ul style="list-style-type: none"><li>• Did you get to know this volunteer before encouraging them to take on a leadership or board position?</li><li>• Did you make a face-to-face personal ask to better understand their interests?</li><li>• Discuss volunteer job description, scope of work, organization’s mission &amp; objects, and potential risks and liabilities if they pursue this personal agenda on the board.</li></ul>
<b>You have been intentional in recruitment and still no one is coming forward.</b>	<ul style="list-style-type: none"><li>• Are your job descriptions overwhelming/asking too much?</li><li>• Are your offering volunteer options to help get them in the door and eventually move along the volunteer continuum?</li><li>• Is your board welcoming and open to new people and ideas?</li><li>• Is there conflict in the organization that is affecting your reputation? This needs to be considered when engaging people and also addressed at the board, so you are not becoming the barrier to people volunteering.</li></ul>
<b>Capacity</b>	<ul style="list-style-type: none"><li>• Add volunteer recruitment to a board member’s responsibilities</li><li>• That individual can break down board recruitment into small manageable tasks and ask existing volunteers or members to help (e.g., ask for help to design a postcard, help draft a job description for board approval, or engage people at programs you can’t attend and recommend potential board volunteers to connect with)</li></ul>

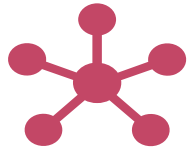


## **Activity: Common Volunteer Recruitment Challenges & Solutions.**

In small groups, focus on one of the challenges that you have been given from the table on slide #20 review solutions and discuss additional possibilities. We will then share as a larger group.



# SUCCESSION PLANNING



## Glossary

**Succession Planning** – an ongoing process for organizations to identify and develop capable and skilled leaders, who can fulfill key roles when they become open. It considers existing organizational needs and future strategic direction.



designed by  freepik

# Why is Succession Planning Important?

- Maintains organizational memory and work contributions of outgoing members
- Find new people to sustain necessary skill sets & knowledge
- Find people with skills/experience that align with future strategic direction of the organization
- Provide continuity as people grow into positions
- Organized and proactive – training and development plans already in place
- Reduce organizational risks & liabilities

# Succession Planning Barriers to Consider....

## Potential Barriers

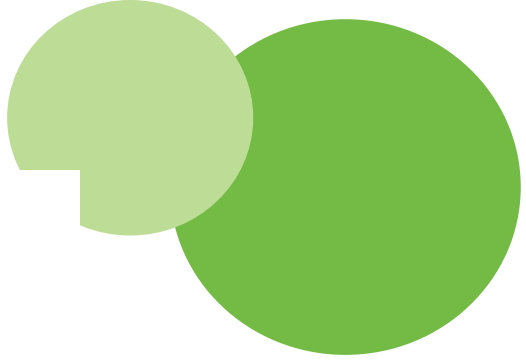
- Perceived fears
- People might feel undervalued
- Poor communication on the purpose and process of succession planning
- Assuming replacement will just “happen”
- Prioritizing the time and resources



**Remember: Mindful Communication**









“One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it’s almost a non-event when it happens”

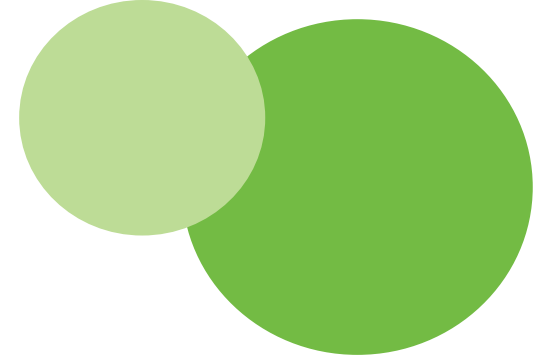
(Anne M. Mulcahy)

Provided by the Business Families Foundation



# What Are you Already Doing?

- staggering board terms
- starting volunteers on committees
- "always" recruiting
- having a compelling vision and telling your story
- engaging those who seem disengaged
- board evaluation and training/mentoring of new members
- job descriptions documented



What other activities are you already doing?

A vertical list of seven horizontal bars for writing, each preceded by a small circle. The circles are connected by a thin line and have different colors: light blue, light green, dark green, light green, pink, dark red, and orange.



## Who is Responsible?

- board of directors provides oversight and implementation depending on the type of governance board
- board committee is responsible for creating, receiving approval and implementing a succession plan.





# Developing Your Succession Plan







## Identify Key Positions for Succession

- Identify key roles first, and not individuals you want to recruit
  - Do this by thinking about the impact to the organization if the position was vacant or left unfilled
  - Ask yourself if there are immediate position terms that are coming to an end
  - Key positions will be different for every organization and will evolve over time
  - As you gain people and better systems, create succession plan for all board positions
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## Identify Key Skills Required

- Identify the skills, experience and /or knowledge required for the key position(s) to meet organizational needs - now and in the future.
  - Skills such as leadership, technical competency, detail focused, networking, problem-solving, or previous board experience might populate your succession plan.
  - Having job descriptions for each role is helpful to determine skills, experience and knowledge required.
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## Find Potential Volunteers

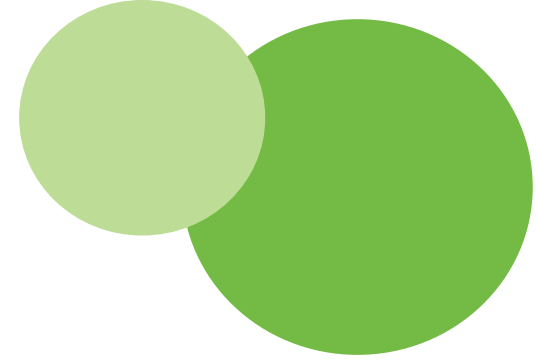
- Identify who is currently in the role and who is in the resource pool that matches the skills, experience & knowledge required
- Goal is to always have an identified person to act as a back-up
- You are almost ready to start volunteer recruitment:
  - think of methods that would align best with the individuals on your list, or
  - when engaging with existing volunteers and community members – have the list of position(s) needed and the skills, *values & characteristics* required for the position



**Find People Who Believe in Your Mission & Values**



Individual that fills a  
**"skill"** gap



# Succession Planning for Inclusive Boards

Community-based non-profit organizations have a key role in building inclusive communities. Boards and volunteer teams that are reflective of communities:

- Encourage all community members to feel welcome to volunteer
- People see your organization as one that creates a sense of belonging for all
- Able to innovate, manage community issues and accelerate board success

## **To be inclusive, consider finding people:**

- Who has different experiences and perspectives?
- Who expands your ways of knowing or doing?
- Who is not currently at the table?
- Who expands the reach and relevancy as an organization?

## Provide Training & Orientation

Once you have great people, you need to invest in them by providing:

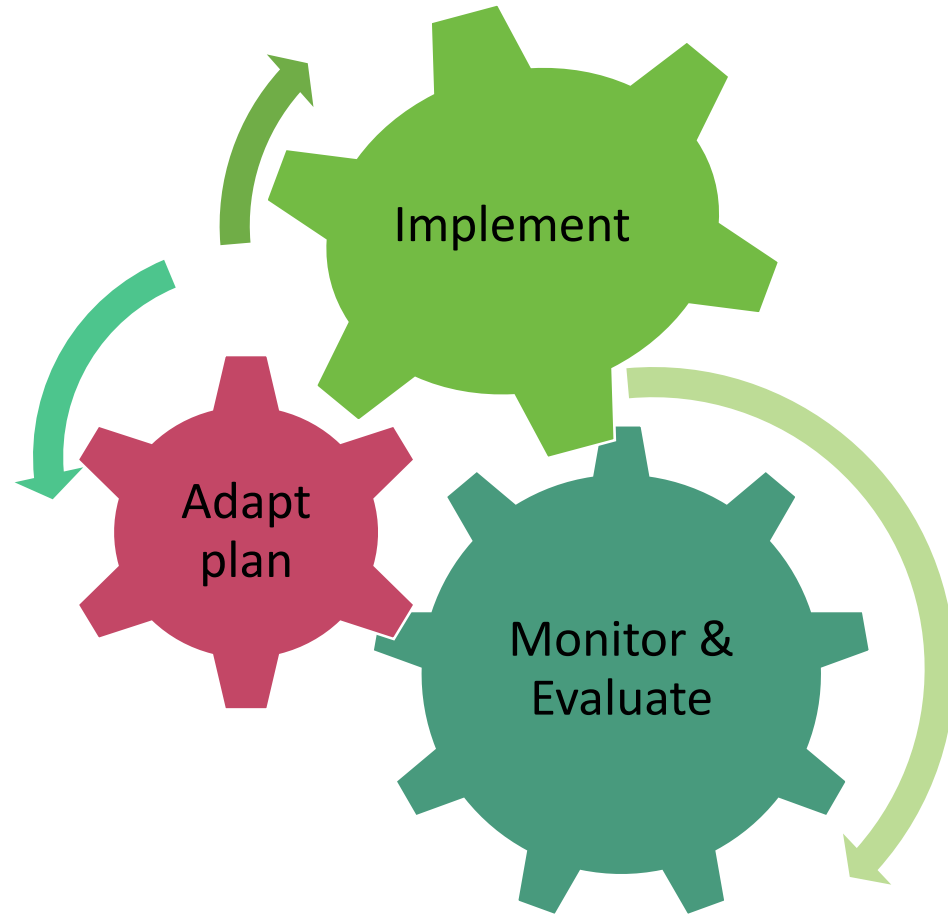
- Robust orientation
- Mentorship for a defined transition period (by past or current volunteers)
- Matching of new people with longer term board members and volunteers
- Create Board Orientation Binder that includes:

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Bylaws</li><li>• History One Pager</li><li>• Strategic Plan and other “plans”</li><li>• Job Descriptions</li><li>• Governance Policies</li><li>• Board Meeting Minutes (3 months)</li></ul> | <ul style="list-style-type: none"><li>• Organization Chart</li><li>• List of Board Members &amp; Committees</li><li>• Calendar of Events and Meetings</li><li>• Most recent audited financial statements and current monthly statements</li></ul> |
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# Board Succession Planning Grid Template

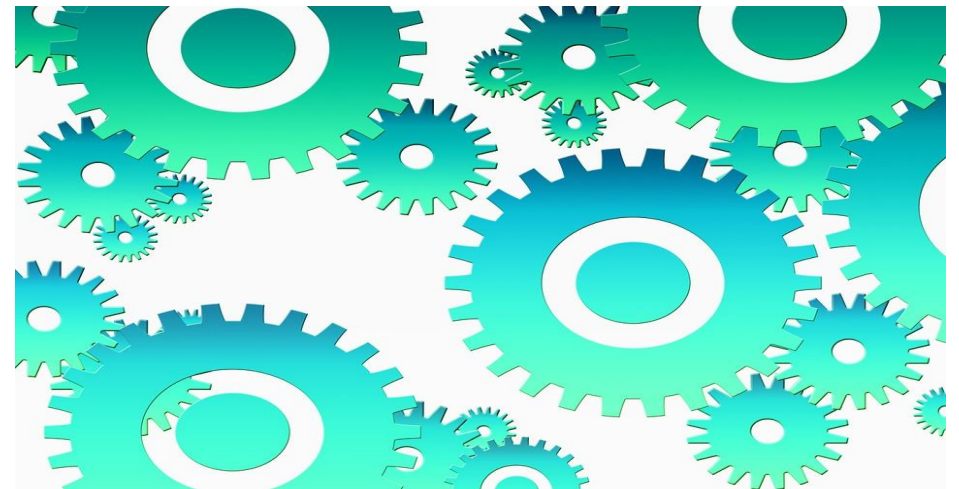
Key Position	Skills, Experience, Knowledge, & Characteristics/ Values	Current Person in the Role	Potential Successor (2 names)	Gap (Yes or No)	Date Position Term Ends/Needed By
Volunteer Recruitment Director	<ul style="list-style-type: none"> <li>- community engagement and outreach experience</li> <li>- Detail orientated</li> <li>- Passionate about community</li> </ul>	N/A	Laura – current community garden volunteer	Yes	AGM Nov. 16

# Implementing the Plan



# Implement

- Create a committee and outline the responsibilities of the board and the committee in a Committee Terms of Reference
- Designate who is responsible for recruiting for different positions and who will report to the board
- Communicate your succession plan to all board members, leadership volunteers and staff for transparency and support in implementation
- Make it a standing agenda item for your board meetings



# Monitor & Evaluate



- Choose measurable indicators for the main priorities of your plan:
  - Have we designated people to recruit for specific roles and is there follow-through when we debrief at board meetings?
  - How many existing volunteers stepped into new roles along the volunteer continuum? Do their skills, experience & values match the position?
  - Do key positions have a back-up in place?
  - Are board job descriptions up-to-date?
  - How long does it take to fill vacant positions?
  - How frequently does turnover happen and why?
  - What feedback have we received on the orientation/onboarding process?
  - Collect feedback (e.g., informal chats, satisfaction survey, and if possible, exit interviews)

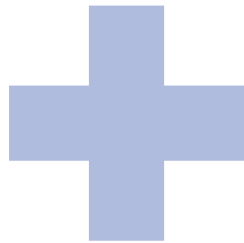
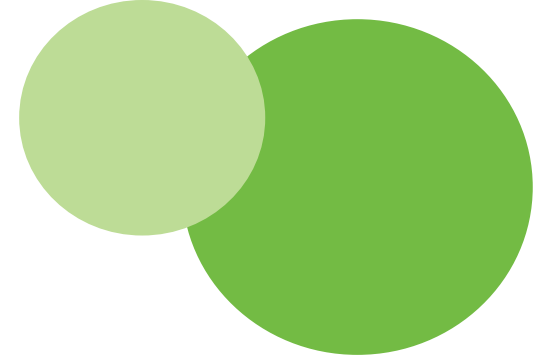
# Adapt Plan

- Succession plans are living documents; change as needed
- Debrief volunteer recruitment outcomes:
  - What recruitment method worked well and what could be improved?
  - Was the potential volunteer interested & able to fill key position, or are they a better fit for an episodic or program position
- Debrief evaluation indicators to inform how you make changes to your succession plan





# CONTINUITY FOR VOLUNTEER RUN ORGANIZATIONS





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**THANK YOU!**