

Strategies for Making Effective Appointments that Grow Your Constituent Society



Kathy Doig, PhD,
MLS(ASCP)^{CM}SH^{CM}
ASCLS-MI Past-President;
Member, Leadership
Development Committee

Agenda

- What is succession planning?
- How are succession planning and leadership development related and different?
- Who is responsible for executive succession?
- How to make it work

Objectives

Following this session and with discussions in your constituent society:

- Define a list of positions for your constituent society for which experienced leadership is critical
- Develop a plan for job rotation/preparation that can develop leaders for the identified critical positions
- Develop a culture in which presidents and presidents-elect confer on appointments and to implement job rotation
- Develop a culture in which committee chairs form committees that involve novice members

Succession planning:



- Creates a pipeline of capable candidates to fill vacancies
- Is a process for insuring leadership continuity with changes to the personnel (but without recycling)
 - Anticipated – with elections
 - Unexpected but not urgent
 - Emergency – BY-LAWS

Succession planning is:

- Most critical for executive officers and key positions, but can also be applied to committee positions
- When implemented effectively, helps retain talented individuals for later advancement

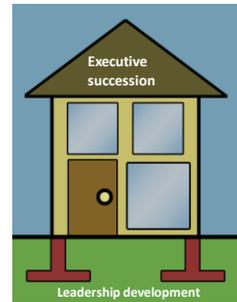


Effective succession planning should be lining up the next executives and critical committee chairs several years ahead of time

Intentional and mindful, but unstructured succession planning can work for a volunteer organization

Incorporate succession planning into what we will do anyway, rather than create a separate process

Leadership development is the foundation of executive succession



Leadership development is necessary to create the pool of executive candidates.

- Creating a pool of capable candidates means developing their knowledge, abilities, skills, and qualifications for serving the organization at a higher level when their time is right
 - Formal leadership development within the organization: orientations, academies, training sessions, assigned mentors
 - Informal leadership development within the organization: participation with observation/reflection, “organic” mentors, JOB ROTATION

What is job rotation?

- It is the assignment of an individual into different roles over time with the expectation that they will learn how the organization functions
 - Varying perspectives on the organization
 - Develops different skills in the individual useful to the organization



Appointments are critical in executive succession and leadership development

– Think of the appointment process like hiring new employees at work – you are staffing the organization



There is nothing you do that is more important than staffing the organization – the right people make all the difference

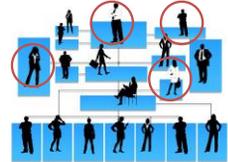


Staffing the organization

- Know the positions and skills/demands each has e.g.
 - How flexible are the responsibilities in time? 
 - How consistent are the responsibilities over time?
 - How much time will it demand? 
 - Are special skills needed that are hard to develop or are they reasonably easy to learn?
 - Is travel a component and is that a problem to get time away from work/family? 

Staffing the organization

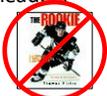
- Develop a list of the most critical positions for the organization, e.g.
 - Officers
 - Key committee chairs
 - **Put your most experienced and reliable members into these key positions**



- Develop a list of developmental (feeder) positions – jobs that help a member understand how the organization operates OR those positions necessary to qualify members for higher office e.g. By-laws, finance, recording secretary, “board member”
 - **Put promising but still “green” members into these positions**



More Tips for Staffing the Organization

- Avoid, if at all possible, placing truly new leaders into the key positions
- DO rotate experienced members into key positions that are NEW FOR THEM= JOB ROTATION 
 - Delegate to strength BUT...
 - Don't let promising people stay in a given position for more than 2 years – fast track = just 1
 - Include positions that will be needed to qualify them for more advanced positions
- Communicate with the president about his/her job rotation vision for each of his/her appointees
 - who is ready for a new appointment and which one?

Even More Tips for Staffing the Organization

- Let people know you see them in more advanced positions and you want to prepare them
 - Say so when you ask
 - Recognize them with Keys to the Future 
- Invite inexperienced members to non-critical positions to begin filling the pipeline
 - Get recommendations from committee chairs
 - Each year, there should be new faces on the board/committees

Do NOT Rely on Volunteers – INVITE people to help you



And even MORE tips for staffing the organization

- Making the ASK
 - Anticipate that the appointment process will take a chunk of time
 - Start early
 - Expect that some people will say no, so have a back-up plan
 - Have two people in mind for each position
 - When people say no, invite them to a different position or one of their choosing to try to keep them involved
 - PHONE people and ask them to help YOU during the next year to accomplish some important/ exciting things

Appointments are critical in executive succession and leadership development

- Tips for committee chairs - truly begin filling the pipeline



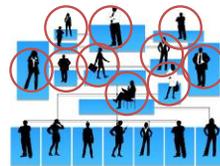
- FORM A COMMITTEE -Invite people to help YOU
 - Include the people who will be most helpful to you
 - Include a person with no experience in leadership within the organization
 - Include a student

Tips for committee chairs

- View your role as mentor to committee members; one of them should replace you as chair
- Make recommendations to the president/president-elect for promising appointees

So who is responsible for succession planning?

EVERYONE IN ANY LEADERSHIP POSITION



So who is responsible for succession planning?

- Committee chairs play a prime role in filling the pipeline – get people into leadership
- Presidents and presidents-elect are in a key position to strategically place people within the organization so that they develop the knowledge, skills, and qualifications for advanced leadership
 - Set an expectation that even non-voting committee chairs attend board meetings – informal training
 - Invite ALL members to attend board meetings and then be hospitable so they want to step up

Last words - How do you make executive succession work?

- You need to be able to look among active leaders and identify at least 5 people who you expect to ascend to president
 - Insure they get good job rotation
 - Expect “melt”
 - Even when personal/work issues prevent progression, keep them active in less demanding roles
- Put new people into “feeder” leadership positions every year

Let's work on executive
succession for your society

Confer with your state society
members to answer these questions

- Which are the most critical positions within the state society that require experienced leaders?
- Which positions within the state society are good "feeder" positions to prepare leaders for critical positions?