



World Association  
of Girl Guides  
and Girl Scouts

Association mondiale  
des Guides et des  
Eclaireuses

Asociación  
Mundial de las  
Guías Scouts

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**Registered as a Charity (No.306125)**  
**in England and Wales**

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# GROWING LEADERS IN WAGGGS



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Leadership in  
Girl Guiding and  
Girl Scouting

## SUCCESSION PLANNING TOOLKIT

In a volunteer-led  
organization

# A message from the Chairman

Welcome to the Succession Planning resource developed by the World Association of Girl Guides and Girl Scouts (WAGGGS).



Girl Guiding and Girl Scouting globally supports the development of young people through educational programmes, leadership development and advocacy work. Through these programmes, WAGGGS and its Member Organizations provide girls and young women develop valuable life skills that can be used in their careers, as volunteers and in their local communities.

Succession planning is essential to supporting strong, growing Member Organizations that can continue to provide these vital programmes. Our international Movement has seen enormous growth over the past 100 years, and by planning for our future and developing young and adult leaders, we will make sure that international Girl Guiding and Girl Scouting will continue to do its vital work for the next 100 years.

Ensuring that you have a strong, effective group of people to take your Member Organization forward will help you achieve your aims and continue to support girls and young women. We encourage you to make use of this publication to inform your succession planning, and we hope you will find it helpful.

MARGARET TRELOAR, CHAIRMAN, WORLD BOARD  
WORLD ASSOCIATION OF GIRL GUIDES AND GIRL SCOUTS

## ACKNOWLEDGEMENTS

This resource draws upon the wealth of experience in the Girl Guiding and Girl Scouting Movement and includes many examples from the Member Organizations. We would like to acknowledge the contributions to this resource of many volunteers and staff of WAGGGS Member Organizations.

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# Introduction

This toolkit provides information, ideas and tools for creating a tailor-made succession planning strategy to keep your organization vibrant and relevant to girls and young women; able to move with the times and respond to change and growth in organizational life.

Succession planning is vitally important for an organization and needs to be prepared for at all levels; National, Regional and World level. The toolkit consists of theoretical background information, exercises and reflection/discussion suggestions and importantly, examples of succession planning stories from the WAGGGS world Regions. At the end of this publication is a list of further information, links and resources to support you in the successful development of your strategy.

## HOW TO USE THIS RESOURCE

This resource is intended for Member Organizations and volunteer-led organizations to support their succession planning strategies. We encourage you to use the resource to support your thinking process and to guide you in the planning process for your organization. The resource can also be used at training workshops and for disseminating guidance to Members.

### WHAT IS SUCCESSION PLANNING?

*'Succession planning can be broadly defined as identifying potential leaders to fill key positions'.*

THE CHARTERED INSTITUTE OF PERSONNEL  
AND DEVELOPMENT, EUROPE

As well as identifying potential leaders, succession planning is the process of developing those leaders to fulfil future key positions in your organization by:

- Identifying critical roles within the organization
- Identifying and assessing possible people who could fulfil those roles
- Analyzing the skills, competences and experience required to take on those roles
- Providing potential successors with the appropriate development activities to develop and fill those key positions
- Developing leadership succession at all levels

## WHY IS IT IMPORTANT TO HAVE SUCCESSION PLANNING?

*Left on their own, organizations tend towards stability and stagnation: Leaders incite and direct change.*

JONATHAN GOSLING, DIRECTOR,  
CENTRE FOR LEADERSHIP STUDIES,  
UNIVERSITY OF EXETER

With good succession planning in place, people are prepared and ready for new leadership roles. The process prepares the organization for when someone leaves and ensures that their successor has what is needed to take on that position.

Succession planning is a tool that deals with the past, present and future. It is connected both with change and with continuity. With organizations continuing to change, diversify and grow, succession planning encompasses the recruitment, development and retention of future and current talent. It is concerned with ensuring both the short term and the long term continuity of the organization.

*Short term → critical skills → replacement*  
*Long term → development → successor*

Succession planning is a top priority for any kind of organization or institution, corporate or non-profit. It is a way of keeping the organization focused on its' vision, mission and goals without gaps in its personnel, processes or procedures.

## HOW SUCCESSION PLANNING CAN SUPPORT YOUR ORGANIZATION

*If somebody in your organization was hit by a bus, what impact would it have on the association – and how is the association prepared for any possible change?*

SUCCESSION. ARE YOU READY?  
BY MARSHALL GOLDSMITH

A careful and considered plan of succession ensures the least possible disruption to your organization's activities and efficiency. Succession planning is a necessary part of an organization's ability to reduce risk, create a proven leadership model, and ensure business continuity. It can also provide staff with some clarity in changing times – hence improving volunteer and staff morale.



### Discussion Point

What happens when an effective leader in your organization leaves? Are you ready to continue your activities without interruption?

How succession planning can support your organization can be understood by looking at the benefits of succession planning. There may be more benefits that your organization can think of.

## THE BENEFITS OF SUCCESSION PLANNING

- Ensures ongoing growth and survival of the organization
- Promotes continuity and stability of operations and policy
- Focuses on leadership continuity and improved knowledge sharing
- Creates the link from now into the future
- Develops people within the organization (provides opportunities for others)
- Prepares current people to undertake key roles
- Develops talent and long-term growth
- Improves workforce capabilities and overall performance
- Improves commitment and therefore retention
- Meets the development requirements of existing (and potential future) positions
- Improves support to leaders throughout their employment
- Motivates members and leaders
- Counters the increasing difficulty of recruiting leaders externally
- Provides more effective monitoring and tracking of competence levels and skill gaps

## Successor...

*"A person...that follows, especially a person who succeeds another."*

COLLINS ENGLISH DICTIONARY AND THESAURUS

# Succession Planning in WAGGGS

WAGGGS has experience in successful succession planning, as well as evidence of what can happen if we do not secure the continued life of units, groups, Associations, or even World Committee work.

Democratic organizations with volunteer decision-makers, who also have other commitments in their lives, constantly face the risk of gaps in key skills and human resources – which quickly has an impact on other team members, staff members and other volunteers.

If we use succession planning as an opportunity to stay ahead of an ever-changing world, we can use the *Patrol System* as a learning mechanism and 'launch pad' for the next generation of leaders.

The **Patrol System** is “a small natural grouping of six to eight persons under the leadership of one of themselves where each individual has an indispensable part to play” (team work). The Patrol System encourages interaction with others, self expression and the development of joint and individual responsibility and democracy in action.

GIRL GUIDING/GIRL SCOUTING: A CHALLENGING MOVEMENT,  
3RD EDITION 1997



Many of WAGGGS' plans run on a three-year cycle:

- World Conference every three years
- Regional conferences every three years (the year before a World Conference)
- Many Member Organizations have their National Assembly every three years (the year after a World Conference)

This three-year cycle has its strengths:

- A predefined cycle, i.e. WAGGGS three-year cycle ensures rotation and succession of people instead of stagnation

And its potential weaknesses:

- There are human resources and knowledge gaps at election times and during the settling of new committees
- The fact that the World Conference only meets once every three years means that many do not know the candidates' experience, skills or potential in great detail



## Discussion/ Reflection Point

### Alternatives

- Could board members be presented at a World Conference and elected by written or electronic votes afterwards?
- Could board candidates be announced with a list of competences needed?
- Do candidates need to be members of the organization, or are the competences more important?
- Any other thoughts?

# Key areas and new trends affecting succession planning

*In this section we will explore some of the key areas and trends affecting succession planning at the different levels within WAGGGS. We will look at the issues or conflicts within those areas which can 'push or pull' against succession planning. These will be referred to as the tensions.*

The key areas we will look at are:

## CHANGES IN THE WORLD

- Tensions
- Environmental trends and challenges facing Member Organizations and its implication on succession planning
- Case study: Youth leadership

## CHANGES IN TODAY'S VOLUNTEER ORGANIZATIONS

- Tensions
- Key trends in not-for-profit board governance and implications to MOs
- Case study: Spotting talent in big organizations and The impact of structure on succession planning

## DECISION-MAKER PROFILE

- Tensions
- Decision-maker profile and succession planning

## KEY AREAS & NEW TRENDS AFFECTING SUCCESSION PLANNING IN A MEMBER ORGANIZATION

Main factors affecting Succession Planning:

Changes in the World

Changes in today's organization

Changes in the needs of individuals

## CHANGES IN THE WORLD

There are many changes and circumstances that affect the survival, operations and growth of an organization, these include: competition, cultural influences, demographics, natural disasters, economic, socio-political, and technological factors. National organizations are facing tensions that are affecting succession planning.

*The arrows symbolize tensions which an organization may experience on a global, organizational or individual level at any given time.*



## Discussion/ Reflection Point

What are the tensions your organization has faced or is currently facing?

**Environmental** trends and challenges facing Member Organizations, and their implications on succession planning

Trends and challenges in the environment	Solutions for Member Organizations
<p><b>Girls and young women are affected by the economic crisis</b>  <i>young people have several small jobs and less time for volunteering</i></p>	<p><b>E</b>mpower girls and young women with life skills that can help them in their careers  <b>C</b>reate a reward system that values the work of the volunteers and show appreciation to ensure retention  <b>H</b>ave fewer demands and more specific short tasks where a volunteer can manage her own time and to an agreed timetable</p>
<p><b>Women have a bigger role in the corporate fields</b>  <i>women are more and more focused on professional careers, taking up more of their time and energy</i></p>	<p><b>B</b>uild a high-profile organization that would attract women with professional background to decision-making positions  <b>H</b>ave less restrictions on physical presence and create opportunities to supporting Girl Guiding and Girl Scouting from a distance</p>
<p><b>We are living in the era of globalization</b>  <i>young people are moving and looking for better opportunities</i></p>	<p><b>M</b>anage time more efficiently, have flexibility in the schedules, consider using virtual team work  <b>U</b>se technology to keep the maximum number of people updated on the organizational plan/activities and decisions  <b>C</b>reate a talent pool of members that are not physically in the city/country but that can still support online and that could be used once back in the country - or as the country's representative where they are  <b>E</b>stablish sufficient diversity at a board level (Age, ethnicity, class, physical ability...)</p>
<p><b>Technology made life richer and easier</b>  <i>a wide range of choices are available and everything is possible in just one click</i></p>	<p><b>U</b>se technology and social networking to communicate with young people</p>

## CASE STUDY 1 : Youth leadership gap in a small organization

**Situation:** A small Member Organization of 1,000 members has had half of the board members in different decision-making positions for the last nine years. Although this board is working passionately to fulfil the Organization's mission, their constitution does not allow more than half of them to carry on as board members. They are urged to find successors for the next board election in three years.

One of the main challenges is that most of the qualified leaders will leave the Association between 25 and 40 years old for a professional career, higher studies or a better work offer abroad.

### Main challenges:

- Retention of talent
- Generational gap
- Leadership gap
- Difficulty in finding people that are ready to accept a decision-making position

### Preparing for succession:

For several years the board has been discussing how difficult it is to retain good leaders due to the socio-political situation of many countries (e.g. economic crisis, low income, lack of opportunities). Deciding how to sustain great leaders and organization over time is not simple. This varies significantly, depending on organizational size and resources. An organization that depends too much on a few leaders is at risk when those leaders decide to move on.

In order to create a good succession plan it is important in this specific case to build a leader development culture.

It includes:

**A look at current leadership resources.** This includes formal leaders (with titles), informal leaders, leadership assets and strengths, and what additional leadership skills are needed to better meet the Organization's mission.

**The creation of a short description of what being a leader means** in the Organization (a statement describing expectations, behaviour and role).

**Benchmarking your activities against other organizations.** This includes studying how other similar organizations attract and develop leaders and deciding which approaches to use within your organization.

**Creating a written leader development plan.** This includes not just drafting and approving a plan but allocating resources to it and making some individuals or teams responsible for it.

**Making the plan part of the system.** This includes integrating the leadership development plan into the annual and strategic plans of the Organization by noting milestones and stipulating progress review.

For small Organizations with a small budget, much of the discussion may focus on clarifying roles of the board, staff and volunteers in providing the necessary leadership. Once these roles are clear (along with the developmental or educational needs associated with them), it is easier to reallocate funds or seek grants to support the development of leaders.

## CHANGES IN VOLUNTEER ORGANIZATIONS

Why succession planning has to be a high priority for volunteer-led organizations:

- There are often fewer candidates volunteering, and the channels for recruiting are also fewer
- There is often a lack of tangible incentives
- The competition for time (family, professional career/education, other volunteer tasks) puts people off volunteering
- There is sometimes limited opportunity to develop leadership within the volunteer organization

In addition to this, many changes have occurred in the way non-profit organizations function today including:

- The new trends in attitudes, experiences, beliefs and values of an organization
- The ability to foster learning experiences which encourage more reflection
- New tensions between power and influence to get things done and the fact that today's leaders and managers are increasingly dependent upon the cooperation of others
- A clear shift from operational to policy governance boards

## TRENDS AFFECTING THE NON-PROFIT SECTOR

### Financial Resources

- Funders moving from core funding to project funding; from multi-year to short-term funding
- Increased competition in the fund-raising and grant-making arenas
- Increased demands in the application process
- Higher standards expected in proposals and applications
- Reporting and accountability requirements often exceed available resources and capacity

### Human resources

- Changing demographics of volunteer base
- Salaries of paid employees below market rate and without major employee benefits
- More contract positions due to the nature of project funding

### Partnerships, networks, and collaboration

- More holistic, integrated, and horizontal approaches to community life
- Coalitions and networks forming across sub-sectors
- Funders requiring partnerships in grant proposals

## Relationships with government and other sectors

- Public policy dialogues being initiated at all levels
- Government seeing the sector not only as a service delivery mechanism but as a vehicle for citizen engagement
- More multi-sector partnerships around community health and social and economic development (social economy, public-private partnerships)
- Shifts in cost-sharing arrangements between orders of government

## Diversity and inclusiveness

- Shifts in demographics
- Voluntary sector staff and volunteer base not always reflective of the cultural diversity of the country

## Performance assessment and evaluation

- Emphasis on social and economic outcomes and impacts
- Competing and conflicting demands from stakeholders

Understanding the current environment will help us understand the new trends in board governance, the implications for Member Organization board members and will help us identify resources, emerging models and good practices for succession planning within the organizations.

## KEY AREAS AFFECTING THE PROFILE & NEEDED SKILLS OF THE POTENTIAL BOARD MEMBERS

*\*The arrows reflect the tension between the skills and the roles*



A number of Member Organizations are facing more and more the challenges of attracting/electing skilled board members, as well as the importance of providing orientation and ongoing training. It remains important to have board members with a strong belief in the organization's mission and the capacity to make a time commitment. However, being individually and collectively equipped to oversee the organization and ensure its future viability also requires that members have the skills and talent that match the needs of the organization.

## KEY CHALLENGES IN BOARD GOVERNANCE AND IMPLICATIONS ON MEMBER ORGANIZATIONS' SUCCESSION PLANNING

Trends and challenges in the board governance	Solutions for Member Organizations
<p><b>Increased focus on governance</b></p> <ul style="list-style-type: none"> <li>• Increased awareness of the importance of governance to organizations</li> <li>• Increased sense of responsibility on the part of board / members</li> </ul>	<ul style="list-style-type: none"> <li>• Gaining consensus for governance review</li> <li>• Improving the board's knowledge around governance and spot leaders with skills in this area</li> </ul>
<p><b>Increased demand for and reduced pool of qualified CEOs</b></p> <ul style="list-style-type: none"> <li>• Greater demand for early retirement</li> <li>• Increased number of non-profit boards seeking highly talented CEOs</li> <li>• Increased emphasis on skills-based boards</li> </ul>	<ul style="list-style-type: none"> <li>• Planning for succession and developing a nomination process</li> <li>• Finding good chair persons and selecting, building, and developing leaders</li> <li>• Attracting and retaining qualified staff and board leaders who can fill the organization's needs and make the time commitment required</li> <li>• Achieving an appropriate balance of skills on the board</li> </ul>
<p><b>Rising expectations and requirements for board members</b></p> <ul style="list-style-type: none"> <li>• Need for board members to assist with fundraising as well as governance</li> <li>• Increased time commitment</li> <li>• Increased demand for highly professional board members with business acumen and specific skill sets</li> <li>• Greater emphasis on ongoing development and learning</li> </ul>	<ul style="list-style-type: none"> <li>• Orienting, training, developing, and engaging board members and finding the funds to do so</li> <li>• Clarifying role descriptions</li> <li>• Ensuring that adequate support exists for board members and communicate it to potential candidates for the board</li> <li>• Addressing challenges posed by appointed or designated board members</li> <li>• Achieving the appropriate mix of fundraisers and governors on the board and defining the role of philanthropy for board members</li> <li>• Placing more emphasis on identifying and bringing the appropriate skill sets to the board and embedding them into the nomination process</li> </ul>
<p><b>Increased demand for efficiency and effectiveness</b></p>	<ul style="list-style-type: none"> <li>• Developing an effective board model and shifting to a more strategic approach</li> <li>• Developing effective policies and processes</li> <li>• Developing an effective method of communication</li> <li>• Improving the effectiveness of board meetings</li> <li>• Understanding the board's role in strategic planning and increasing board member competency in this area</li> <li>• Developing the board's capability to assess partnership opportunities</li> </ul>

*Continued overleaf*

## Trends and challenges in the board governance

## Solutions for Member Organizations

### More emphasis on both process and culture and the balancing of the two

- Developing a board model and processes and policies to support that model
- Achieving the appropriate balance of power between the chair, the CEO, and the board
- Maintaining good relationships between board and staff
- Fostering a culture of engagement and constructive debate

### Increased demand for transparency and accountability

- *More emphasis on process*
- *Increased formality in financial audits*

- Bearing increased cost of meeting higher standards
- Balancing implementation of standards with resources
- Ensuring compliance
- Formalizing accountability and stewardship
- Determining the board's information needs and formulating the right questions to ask

### Increased emphasis on performance measurement

- *Increased emphasis on measuring effectiveness of boards*
- *Increased use of board self-assessments*

- Setting appropriate objectives for the organization, the board, and the CEO and determining effective ways to measure their performance

### Increased attention being paid to risk management

- Assessing and managing risk
- Developing board member competency in risk management
- Carrying appropriate insurance



## CASE STUDY 2 : Structure effect on succession planning in a big organization

**Situation:** A Member Organization of 200,000 members had a membership increase in a very short time to reach 1,000,000 members due to a government legislation incorporating Girl Guiding in public schools as an afternoon activity.

### Main challenges:

- Revise the structure of the organization
- Setting priorities to recruit more leaders
- Spotting more talent for the board
- Creating relationships

### Building succession for a large organization:

This large organization is managed by elected volunteers who come and go.

Middle-management in this organization tends to emphasize policy, procedure, and formal agreements such as contracts much more than they do relationships. Because of an environment where priorities change as elected leadership changes, middle-management also tends to be risk-averse.

In order to create a good succession plan it is worth spending time and energy reconsidering the structure of the organization to better fit and serve the new situation.

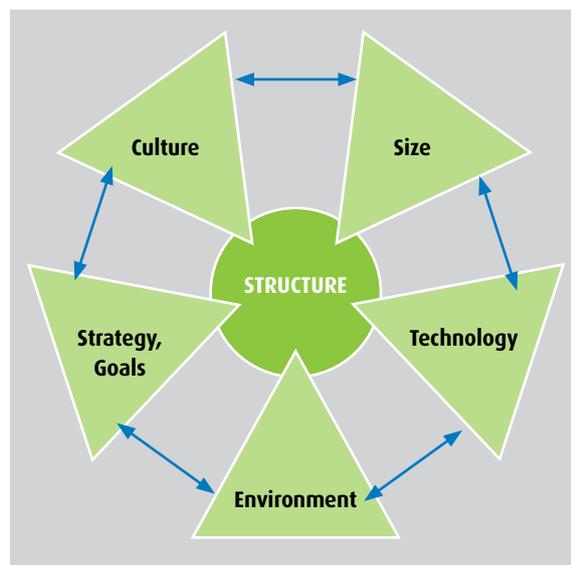
Organizational design allows us to match our internal structures and policies to meet the demands of the external environment and competitive strategy.

The contextual variables that should be considered when identifying an organization's structure are environment, technology, size, goals and culture.

See diagram.

The awareness of contextual variables is much more than just an identification process; it actually helps to set the creation/revision of structure. In essence, organizations want to determine how to organize their structure, their control mechanisms, their communications, their innovations, their interdepartmental relationships, their decision-making, and their overall guiding principles to allow for optimum performance.

By considering these contextual variables and how they are different within the organizational paradigms, Member Organizations can better determine the effect the variables have on their structure.



*Continued overleaf*

## CASE STUDY 2 *Continued*

The board's job in building succession and sustainability can be very complicated, particularly as the organization grows. This section points out a few broad categories of issues that are likely to arise while restructuring:

- **Preventing volunteer burnout:** Member Organizations are fuelled largely – if not entirely – by volunteer effort. Keeping volunteers feeling good about their efforts and not feeling overworked helps keep current volunteers involved, a good organizational structure can help with this.
- **Long-term stability:** In all organizations, the people who keep the organization going will eventually move on, so the key to keeping things going is to develop the organization so that it is not too dependent on any one person. Creating a solid organizational structure is one of the best ways to do this.
- **Greater effectiveness:** Whatever the priorities of an organization – whether increasing the number of volunteers, spotting talent, or putting emphasis on attracting skilled board members, these priorities will be better accomplished with a good organizational structure.
  - Understanding the board's role in strategic planning and increasing board member competency in this area.
  - Placing more emphasis on identifying and bringing the appropriate skill sets to the board and embedding them into the nomination process.

**Grooming leaders:** One of the considerations when interviewing board candidates is leadership potential. Not all board members have leadership potential, but when they do, it is good practice to try to move them into positions where assuming leadership is a natural progression. It is good practice to give them some assignments and see how they respond to the challenge. Also, in organizations that have two or three vice-presidents, they will stand a better chance of having one that will rise to the challenge and make a good leader.

**Board involvement:** Another organization ensures that the chair and the full board have a real stake in the selection of board members. The board discusses succession issues at every board meeting, i.e., they talk about the needed skills for the upcoming term and criteria for new board members.

**Marketing and communication:** Need for branding and marketing to create a visible identity, as well as attract/retain talent that will feel proud to belong to the organization.

In the case of this Member Organization, attention to organizational structure also involves attention to branding and nurturing leadership. Most people will be attracted to an organization that is making a difference and is well-profiled in society.

If the organization is for both girls and boys, there are even more circumstances to be aware of such as the balance between men and women in decision-making and programme development, and to adjust to the policies of more than one global organization - World Association of Girl Guides and Girl Scouts as well as World Organization of the Scout Movement (WOSM). Some organizations have rules about doubled chairing of all key decision-making positions; others have quota limits i.e. not more than 60 per cent of one gender in a committee.

“Governance has certain principles that are common across the public, private, and non-profit sectors. These are transparency, clear allocation of roles and responsibilities, financial probity, accountability, and looking at outcomes.

Recognize that the principles of good governance apply to all organizations regardless of their size. The structure will have to be tailored to the institution depending on its size, but the principles remain the same.”

THE HONORABLE BOB RAE  
ON BOARD GOVERNANCE PRACTICES

Another challenge occurring in some organizations is weakening democracies – a decreasing number of people taking part in decision-making assemblies and democratic discussions about the educational programme and constitutional affairs etc. To meet this challenge it can be optional to invite these discussions and decision voting to take place in electronic media.

Weakening democracies may demand an increased effort to ensure a balanced diversity of representatives in decision-making bodies regarding:

### Age

(youth, 20-35 years, 35-50, 50+)

### Educational and professional status

(i.e. teachers, economics, administrative, academics, health workers, employers, entrepreneurs etc)

### Interests

(environmental, female politics, marketing, children, charity, fundraising etc)

## CHECK POINTS

Does your organization consider:

- Age, education, interests and gender alignment
- Trends in your environment and culture
- Board governance versus finance/fund raising



## Discussion/ Reflection Point

### Survival Cultures?

- How does your national culture support female decision-makers?
  - How do you cope with this fact?
- Do you nationally have a culture that can prevent your organizational life from thriving?
- How do you cope with that?
- How do you discuss and maybe get support for developing a realistic succession planning strategy?
- Does the country have rules that support or prevent your organization from the best succession system? How and why?
- How do you match the changes in family structures and women’s roles in society to the organization?



# Key challenges for attracting & retaining volunteers to serve at regional & world levels

*The following section will outline and explore the key challenges facing volunteer organizations in the attraction and retention of volunteers at regional and world levels. The challenges can be outlined as follows:*

- **Attracting skilled board/committee members**
- **Role clarity**
- **Board/committee members' development**
- **Process and culture**
- **Accountability and stewardship**
- **Leadership**
- **Measuring board/committee effectiveness**

## ATTRACTING BOARD/ COMMITTEE MEMBERS

Finding qualified volunteers to serve at regional and world levels continues to be a challenge as today's boards/committees require greater skills, expertise, experience and time than ever before.

The availability of qualified volunteers has been reduced. The key issues organizations face in attracting qualified members include: member liability, finding and retaining qualified people, succession planning, the nomination process, election criteria and removing members that do not meet the needs of the organization.

*“Having processes in place is great, but if you don't have qualified members, it won't mean a thing. A good committee you can often operate with systems that aren't quite as tight and finely structured. Qualified committee members are those that have some flexibility, vision, intelligence, and humility. A good board attracts good staff and good staff works effectively with its board; they bring the best out of each other.”*

DR. C. GILVEN SOURCE: SUCCESSION. ARE YOU READY?

## ROLE CLARITY

As board/committee members strive to perform their governance duties, role clarity is exceedingly important in a number of areas.

**Area of expertise:** When an election is based on skills, the volunteer will bring a different range of expertise and competence that would fulfil the needs of the board/committee. This will help build a better understanding of the strategy to be undertaken for regional and world growth and sustainability.

Each member will be responsible for one specific area of work that is well defined from the beginning in order to avoid redundancy.

**Governance versus fundraising:** Non-profit volunteers often play a dual role in governance and fundraising. This can pose a risk of becoming the fundraising arm of the region or world and leaving the governance function behind.

**Governance versus management:** The board/committee members' role is to work closely with the management (staff members) and set the parameters within which management can function. The volunteers' are responsible for the strategic and financial stability of the organization. Together the volunteers' and staff role is to work in partnership to define and deliver on the organization's strategic goals. It can be challenging for many organizations to reach this critical level of understanding.



### Tip

- Give opportunities for individuals to form supportive teams that complement each other
- Use a team role personality profile like Belbin Team roles to discover and maximize the roles in your team

#### Belbin Team roles:

A theory discovered by Dr. Meredith Belbin and her team in the 1970s. They found that 'different individuals displayed different Team Roles to varying degrees.' Visit [www.belbin.com](http://www.belbin.com) for more information.

## BOARD/COMMITTEE DEVELOPMENT

Three main challenges exist in the area of board/committee development:

- becoming more of a board based solely on policy
- training – time issues and constraints
- training – developing the training to accommodate the varied knowledge base, cultures and experience of participants
- developing board/committee members – and overcoming inertia

Becoming more of a policy board is particularly difficult when board/committee members believe that they, rather than staff, are responsible for running the day-to-day life of the organization.

WAGGGS is challenged with a need to do more to orient and educate board/committee members around their roles and responsibilities, policies and practices, culture and history.

Training on specific areas of work can potentially help the volunteers better understand WAGGGS' aims, which in turn helps them to fulfil their responsibilities for the organization.

## PROCESS AND CULTURE

It is a challenge both to develop effective volunteer policies and processes that are in line with an organization's capabilities and to develop a successful board/committee culture.

### Challenges

**Process paralysis** - Committees can become paralyzed by process and must find the right balance between focusing on important issues and getting the process right.

**Compliance vs. governance** - The focus on compliance often distracts from the strategic governance of the organization.

**Risk taking** - Some boards/committees have developed the "on the safe side" syndrome where the board is full of minutes and documentation to make sure that every "i" has been dotted as its way of reducing risk. This type of risk-reduction strategy does not increase the effectiveness or efficiency of the committee.

**Adopting appropriate governance practices** - It can be difficult to stay up-to-date with governance practices being embraced by the commercial world and introducing these practices, where appropriate, into their region with cultural relevance and sensitivity.

**Board/committee engagement** - WAGGGS need members who take their governance responsibilities seriously. Being a committee member is an active job not a passive exercise. Consequently, it is crucial that prospective members understand their responsibilities and those current members recruit individuals with a passion for the organization and a willingness to serve.

## ACCOUNTABILITY AND STEWARDSHIP

There is a need for more formalised accountability and stewardship. It is a challenge to put in place the processes necessary for accountability and good donor stewardship.

**Example:** Donors are increasingly mindful of how their money is spent to ensure that it is used for its intended purpose. Increasingly, volunteers are not prepared to ask corporations for money if they cannot tell them how the organization used their last donation.

Effective stewardship requires your current board/committee to prepare the way for the future board/committee. It is the board/committee's responsibility to ensure that the organization is left in the hands of capable leaders, including leaders who are representative of the organization's constituencies. The long-term viability and strength of WAGGGS will expand as the board fulfils its duty to plan for its succession and to address diversity issues.

Higher expectations for board/committees and a greater sense of responsibility on the part of staff require that board members ask more probing questions and tackle difficult issues at the board table. Thus, there will be more emphasis on business acumen and increasing pressure on board and committee members to sharpen their focus.

## LEADERSHIP

**Board leadership:** A good chair will ensure that there is an effective board/committee. In addition to the challenge of finding a good chair, the committee must develop a process to measure the performance of volunteers.

**Retaining good people:** Retaining good people is a challenge at all levels of WAGGGS. With the increasing demands on women of all ages, WAGGGS needs to be creative in the way we use this very precious resource.

**Power:** If the balance of power is not maintained between the chair, board/committee and staff, one individual or group can have too much power. This potential imbalance of power, either perceived or real, can lead to problems and/or conflict in the organization.

**Measuring board/committee effectiveness:**

It is important to determine the appropriate monitoring and evaluation methods for board/committee performance and effectiveness. The following check points can assist you in starting to think about in measuring and evaluating your organization's effectiveness.

## CHECK POINTS

How do you:

- Attract board/committee members – how can you improve?
- Clarify the roles
- Develop your committees and their members
- Describe procedures and culture
- Ensure accountability and stewardship
- Structure the leadership
- Measure board/committee effectiveness

## SUCCESSFUL PRACTICES

### CHALLENGE:

Recruiting qualified board/committee members

### SUCCESSFUL PRACTICE #1:

Establish a “Spot candidate strategy”

Spotting potential candidates is an ongoing process that requires active and ongoing cultivation in different context and settings (spotting good trainers in the regional training pool, good fundraisers in a regional fundraising event, skilled communicators ...)

- Know exactly what and who you are looking for
- Advertise and make use of member organization websites/magazines...
- Call for nominations in an attractive way
- Encourage volunteers and assess them for suitability for the board/committee
- Look for community leaders
- Actively seek candidates from the “professions”
- Have an application process with defined criteria and required competencies based on position descriptions. While there is no control over who gets elected, try to control the quality of the candidates
- Encourage application from outside the national boards
- Encourage application of candidates under 30 involved in their communities

### CHALLENGE:

Training, engaging, orienting, and developing committee members

### SUCCESSFUL PRACTICE #2:

Commitment by the organization that committee development is a priority

- Be honest in telling new board/committee members what being on the board is all about and the process for change. Set clear expectations before you ask them to join the board.
- Arrange for the chair to meet with new board/committee members individually or in small groups to outline plans, purpose of the organization, and expectations.
- Involve board/committee members in some aspect of the organization so they experience what the organization is all about.
- Have board/committee members’ retreats that are not just about strategic planning, but about the current and evolving role of the board/committee.
- Set aside time at least once a year to look at where the committee is going, i.e. governance planning, etc.
- Bring in some stakeholders, e.g. girls and young women being served who can speak passionately about the cause and the issues.
- Encourage young leaders on the committee. It is good for a variety of ages, bringing different experience, to be on the Board.
- Bring in experts to help with an education process around obligations and responsibilities. Bring in legal counsel. This gives people peace of mind and clarification.
- A committee file with policies and procedures is great, but doesn’t work if you do not have a champion to promote its use.
- Committee development should be prescriptive and mandatory.
- Create a “critical friend” approach as a way of supporting each other.

## CHALLENGE:

### Roles & Responsibilities

#### SUCCESSFUL PRACTICE #3:

#### Clarity and transparency

- Have very clear regional and world board guidelines that can be followed easily and readily
- Define the role of the board/committee, sub-committees, each committee member etc
  - Agree on clear ways of working
  - Agree on the decision making process
  - Agree on a communication system and the flow and sharing of information – what, how much and to whom
    - Information within the committee
    - Between the committees
    - WAGGGS and committee
    - MOs
- Link internal and external training closely to board/committee member's responsibility
- Talk about sensitive issues openly at the committee level.
- Start out by reviewing various governance models and adopting a model of practice. This will determine the preferred direction and ongoing education requirements. Preferred direction has to be in keeping with mission, vision, values, strategic plan and the region's needs. Once that direction has been determined, you can import the ongoing education.
- Ensure that the committee agenda is focused on strategic world and regional issues.

The board/committee is responsible for leading the change.
- Partners and external consultants should be involved where specific skills are needed.
- Encourage open, frank and timely communication between all concerned.
- Work towards clear roles and expectations.
- Mutual respect, which includes an ability to disagree and a level of comfort that your comments will be received well and that you will not be barred as a result of expressing your views.
- Trust is essential and in order to build trust, one must deliver.

## RECAP

So far in this resource we have looked at:

- What succession planning is
- Why it is important
- How it is going to support your organization
- What the benefits of succession planning are
- Succession planning in WAGGGS
- Changes and trends affecting succession planning

The next section will take you through the process of creating a succession plan for your organization.

Before you move on consider the following questions in your current leadership teams.

- What are the main challenges we need to be aware of in our organization?
- What are the opportunities succession planning could offer us?
- What are we already doing to support the succession process?
- What could we do more of to improve?

You may not have all of the answers at this point but some discussion could generate new ideas and thinking as you enter the process.

# The process of creating a succession plan

The key areas we will look at in this section will support and guide you in creating your succession plan. There are some task focused areas and some points to discuss and think about:

- **Organizational analysis**
- **The role of a selecting committee**
- **Use of the Constitution**
- **Recognizing service**
- **Risks of not engaging in succession planning**
- **The benefits revisited**

## ORGANIZATIONAL ANALYSIS

A good starting point for successful succession planning is to start analyzing your organization's strengths and identifying areas for improvement. An analysis will help you to explore: 'where are we now and where we want to be.' This big picture analysis is best looked at as a team/decision making body.

There are a number of questions that can assist you in identifying your organization's strengths and weaknesses:

1. What/who has brought the organization to its current place?
2. How is the organization perceived by internal and external members?
3. What skills and knowledge were needed?
4. Is the organizational knowledge embedded in the system processes or is it owned by a specific member?
5. What does the future look like for the organization?
6. What skills are needed for this?
7. Does the necessary talent currently exist in the leadership team?
8. Are there existing volunteers who can play a role?
9. Does the organization need to recruit talent?
10. How does/can the organization build and retain talent?

The answers to these questions are a good starting point for organizing your succession plan. In your discussions further conversations may arise regarding:

- the priority of roles and tasks within an organization
- communication strategies
- necessary recruitment strategies
- training or learning development programmes
- the need for a knowledge management system
- a defined hand over process

These conversations can lead to decisions that will develop into your organizations succession plan.



## Example

### Succession planning as seen by the MOs

#### Managing Succession Planning:

*Advertising* - We encourage board members and staff to consider succession planning as early as possible in the term.

- We have introduced the possibility for terms to be extended by one year, so there is some overlap between the person leaving and the new person starting. The previous person can then induct the new person.

*“Resource Persons”* – these are positions available for people who want to get involved without taking on a full term. They have to be elected for a specific mission such as being part of an event planning team. These positions are ideal for those who want limited commitment but can also help take on some work. It also gives the possibility to gradually involve people who are afraid to start straight away with a “heavy job”, and afterwards they can become more involved.

- Starts with the recruitment procedure. Any organization must choose its priorities when picking a potential staff member. Their job description should clearly lay out the qualities that the candidate must have what they need to have, and what the organization would like them to have.
- Use this job description to select profiles and explain clearly the work load, and the requirements of the function.
- There are “procedures” and “manuals” to help people get started in their function.



## Examples

### Examples from the Guides Catholiques du Beligique and the Girl Guides of Australia

#### 1. Responsible and Involved Parties

- Each person is responsible for their own succession
- The whole team is involved in identifying potential candidates – as are the people that previously held the position (for example, a new candidate or potential International Commissioner will meet one or two previous international commissioners to discuss the role).

#### 2. Challenges

Making sure that people think about succession planning before it is too late. You need to have a structure and plan in place to do it well.

#### 3. Successes

We are currently inducting a new candidate for International Commissioner – she has met three former International Commissioners, has been informed through the job description and accepted the task. She has accepted under the condition that she can contact us when she needs to (and might join the training for new national board members).

The above process has just been carried out for the new President (and was also done for the previous one, which had been a candidate but wasn't elected by the National Assembly). Our process made it possible to identify a new candidate within a short term and go for an election after a short period of time.



## Tip

As you create your plan remind yourself of the key benefits of succession planning:

Leadership → Continuity → Stability

## Leadership

- Develops leadership within the organization
- Improves support to leaders throughout their employment
- Focuses on leadership continuity and improves knowledge sharing
- Counters the increasing difficulty of recruiting leaders externally
- Develops talent and long-term growth

## Continuity

- Creates the link from now into the future
- Meets the development requirements of existing (and potential future) positions
- Provides more effective monitoring and tracking of competence levels and skill gaps
- Brings in new ideas and talent
- Develops people within the organization

## Stability

- Improves commitment and therefore retention
- Works towards continuity of policy and operations
- Increases stability of the organization
- Improves staff motivation and morality
- Ensures ongoing growth and survival of the organization

## THE ROLE OF THE SELECTING COMMITTEE

In many organizations, it is the role of Human Resources to ensure succession planning. However, it is vital that any leadership team also takes ownership of their succession planning process to ensure its implementation and ongoing success.

The selecting committee can support you in the following ways:

- Determining what roles and skills are critical for the growth of the organization
- Carrying out a Risk Management Analysis for these critical roles – including both the probability of the risk and the seriousness of the consequences for each risk
- Analyzing and addressing the gaps revealed by the succession planning process
- Identifying and understanding the developmental needs of volunteers to fill those positions
- Help to ensure volunteers are sourced, selected and elected
- Ensuring that all key volunteers understand their roles and responsibilities
- Enriching succession plans through regular discussions within the National Board

- Creating a team that is responsible for spotting talent within the organization
- Identifying top performers in all the committees and making sure that they are engaged and satisfied to stay with the organization
- Continually reviewing and checking the process of succession and whether planned individual development has taken place
- Discussing frequently expectations and future plans for the key roles, including their motivation and emotions for the changes ahead.
- Making it a point to discuss the constitution regarding succession and the procedures of electing and appointing key positions

## ACTION

Have a conversation with your selecting committee to see how they can support you in creating your succession planning process.

## USE OF A CONSTITUTION IN SUCCESSION PLANNING

A *constitution* with clearly defined roles and *terms of reference* is a useful tool in succession planning. When used effectively, individuals within the Association are expected to respect the terms of reference, which would allow other people to transition into certain positions. A constitution should define the process of the selection of candidates for different posts. Recruitment of individuals needs to result from a true democratic process where every leader has the opportunity to serve the organization based on the skills they have.

### Constitution...

“a set of fundamental principles or established precedents regarding how an organization is governed.”

WIKIPEDIA, 2011

### Terms of Reference...

“describe the purpose and structure of a role, project, committee, meeting, negotiation, or any similar collection of people who have agreed to work together to accomplish a shared goal .”

WIKIPEDIA, 2011

The process of creating a succession planning strategy for a national board, a regional or local committee, a task group or career staff, are almost the same. However, there are special challenges in merged and mixed associations who have an unbalanced diversity of boys and girls, or an imbalance in the number of female or male leaders compared to the ratio between boys and girls as members.

In associations with Girl Guides, Girl Scouts and Scouts there is often a co-chairing policy, so all important groups are led by both a female and a male chairman. The principle of co-chairing (with either a man and a woman or two women) has several strengths.

- The chairman has a peer for discussions of important and difficult questions and issues
- There is a responsible person available during holidays or other periods of absence
- There is always a substitute ready for taking over a project or decision-making
- In positions needing a 24 hour alarm service, this could be serviced by more than one person taking turns
- Rotation of the same people in different positions

In order to adjust to rapidly changing times and busy lives, some organizations revise their constitutions so that they:

- Reduce the number of years that people serve and allow for overlap
- Organize the work into projects that allows people to take on smaller projects and dip in and out

## CHECK POINTS

Here are some of the key issues the National Board/ National Executive should consider while developing a succession plan:

- Strategic plans and future goals
- Volunteer requirement
- Knowledge retention
- Communication policies
- Critical roles
- Talent management strategies
- Risk assessment on critical roles

## RECOGNIZING SERVICE

Succession planning is not only about ensuring that the right people are recruited and retained in the organization. It is also concerned with giving positive recognition, and providing opportunities to individuals and groups for development and change.

It is essential to create a positive atmosphere of recognition, appraisal, motivation, learning, opportunity and fun. Lack of recognition may affect the leaders' motivation. We need to have achievable tasks and jobs that measure results and appreciate people in different ways for the job that they have done.

Departures from the Association can facilitate one's future involvement in the association whether it be through occasional contributions or perhaps even through a return to the association after some period of absence. Acknowledging the contribution of individuals to an organization is an important part of succession planning and good practice generally in organizations.

Recognising work and involving people at different levels in your Association is important because:

- Some people do not want to step forward and propose themselves, so they wait for others to nominate them
- Others do not want to nominate a competent leader, if they are afraid that this can cause leader gaps in their own unit
- Some people are afraid of proposing ideas, if it could mean they are asked to carry out the task themselves
- If the suggested ideas or people are not being used for some time, those people can become discouraged or lose interest



## Discussion/ Reflection Point

### Over to you

- Where and how have you been given opportunities to impact the decisions and life of your organization?
- Have you been instrumental in identifying and encouraging others for positions?
- Have you been forwarding suggestions to your organization to be taken into consideration by your decision-making body?

# The risks of not engaging in Succession Planning

Without the implementation of a succession plan, there can be significant consequences for an organization including:

- **Loss of expertise and knowledge of the organization**
- **Loss of continuity**
- **Leadership gaps**
- **Damaged client/partnership relationship**
- **Lost time and effort to recruit and train replacement employees and volunteers**
- **Inability to achieve the mission and realize the vision**
- **Severe gaps in historical knowledge about the organization**
- **Unprepared/unqualified successor in a key role**
- **Uncertainty for staff and potential of low morale**

If an organization is left without a competent leader, the organization can suffer. In an unplanned situation, ineffective quick-fix solutions may be taken. A temporary replacement is often the only choice, and the ultimate result may be that the organization, temporarily, does not perform well.

## KEY POINT

Think of succession planning in terms of a business. Without succession planning, a business that has become successful can just as easily fail. The business grows partly because there is a leader with experience, drive and ability. Without proper succession planning, the future success of the business is not as secure once that leader has gone. With so much at stake, succession planning has to be a priority and should be part of every organization's strategic plan.

### *Today..*

Good joint management and effort among the decision-makers builds a comfortable, strong, empowered, and conscious organization.

### *Tomorrow..*

Suddenly, unexpectedly, a key shareholder leaves for some reason and the organization's life is disrupted instantly.

### *In the Future...*

The remaining group of decision-makers faces a critical decision, and if they have a succession planning strategy, they can use it and recruit successors while developing new talent to succeed in the future.



## SCENARIOS

In national boards and committees, a time limit of six years or two trienniums for key positions is often used as a natural and acceptable rule for succession in decision-making bodies.

Some constitutions state that all committee members are to be elected at each assembly, while others work on a schedule where members are elected for two periods, with only half of the members elected at each election. Under this strategy, there will always be some experienced members on the board and committee during each period.

There are always risks of having either a very 'old' board or a very 'young' board – succession planning is intended to ensure that a balance is created.

A special category of leaders exists in WAGGGS Member Organizations that run mostly school-related units. Here the teachers are the leaders of the leisure time activities offered at the school.

As Girl Guiding and Girl Scouting activities demand a reasonable amount of planning, self-training, and involvement, very often the leaders – or teachers – are the youngest and least experienced. They are also more likely to pass on their leadership role in Girl Guiding/ Girl Scouting to other teachers. With very little room for succession planning, the new leaders learn 'on the job'.

## CHECK POINTS

Does your organization have:

- A considered system for ongoing growth and survival
- Continuity of policy and operations
- Stability
- Stimulating and motivating members and leaders
- A system for staff development (provides opportunities to increase or better skills and develop new ideas and talent)
- Revised and up-to-date election procedures in all levels of the organization

As part of creating your succession planning process here are some key points to remember:

- **Prioritise** the roles and tasks within the organization
- Decide which ones are **critical roles** in ensuring the quality and continuation of your work
- Decide and prioritise **critical information needed for these roles** and design a **communication strategy**
- **Recruit** - competent people
- **Train** and develop - to enhance knowledge, skills and abilities related to important tasks
- **Create a system of performance** assessment and **recognition** management - preparing for advancement or promotion into ever more challenging roles
- **Be ready for change** – be prepared to retain or replace volunteers
- Prepare the resigning people to **hand over** their skills and knowledge and to take on other challenges
- **Show Appreciation** to those who have finished their tenure. Be open to them taking up new responsibilities within or outside of the Association.

Decision making body  
+  
Succession planning process



- Teams play "what if" scenarios to ensure that they are thinking of most possibilities
- Succession plan clearly sets out the factors to be taken into account and the process to be followed in relation to retaining or replacing the person
- Succession management systems are in place to provide the best solutions and shortest paths to succession
- Organization maintains leadership, continuity and stability

## WAGGGS SUCCESSION PLANNING MODEL

Succession planning is not an exact science. There simply isn't one approach that's right for every situation. Each organization will need to decide on the best way to ensure that there are enough skilled people to lead and manage its business and move the whole organization forward.



This section offers suggestions for your organization to build and maintain an effective succession planning strategy. You can adapt and adjust – and add existing elements from your organization's traditions and constitution.

WAGGGS has developed a Succession Planning Model drawn from the experiences and research gathered over the years. The model uses the metaphor of seven cogwheels that are linked with one central wheel (a 'Succession Plan Strategy') and six surrounding wheels (the elements that make the succession plan work). The three layers in the model represent the three different levels within WAGGGS: National Member Organizations, the five WAGGGS Regions and committees, and the whole WAGGGS structure.

### A machinery with cogwheels is an internally supportive system

- All surrounding wheels help ease the other's work, as well as drive the big wheel
- If one of the surrounding wheels slows down or stops, it does not necessarily stop the whole process, only prevents full speed
- If one wheel is trying to go in the opposite direction, this will be prevented by the other wheels which will have to work harder
- Full speed is achieved when all wheels work together in harmony

Each wheel represents an element of succession planning:

- 1 Vision and strategy**
- 2 Defining key issues, needs, and possible gaps**
- 3 Recruiting talent**
- 4 Training and developing talent**
- 5 Hand-over process - monitoring and appraisal**
- 6 Revising the Succession Strategy, and repositioning talent for new challenges**

For each element, there is a procedure recommendation and some human resource considerations to be addressed.

The model builds upon recommended methods for succession planning and covers the planning, implementation, evaluation and revision of the succession strategy.



These six wheels will be explained in the next sections.



## 1 VISION AND STRATEGY

### Succession Planning is driven by strategy

An organization that has a well-defined mission, vision and set of strategic goals will be in a better position to define the leadership qualities and personnel needed to implement these long-term succession aims.

Good practice is for succession planning to be incorporated in the organization's operational strategy and aligned with your strategic goals. This will enable the organization to:

- Identify key needs and roles for succession
- Develop a clear understanding of the capabilities required to undertake those roles

**A Vision** is a positive picture of the future. Your vision should be an inspiring, attractive, yet realistic idea of what your organization can become. A vision can be any length, but it is recommended that you keep it short and memorable.

**Example:**

*WAGGGS' Vision 2005 - 2011 is...* "A growing worldwide Movement – the voice of girls and young women who influence issues they care about and build a better world" This is going to change and the vision of an organization changes its' vision in line with its' evolving focus and aspiration.

**A Mission** is a statement of your purpose and of what your organization does.

**Example:**

*WAGGGS' Mission is...* "To enable girls and young women to develop their fullest potential as responsible citizens of the world."

**Strategic goals** are specific, measurable aims relating to your Vision

**Example:**

WAGGGS' Goals are:  
Leadership development  
Strong and growing Member Organizations  
The voice of girls and young women

### Example of a succession planning strategy for an organization

Subject	Content	Responsible for implementation and revision
Vision	Our Organization wants to be ..... by providing ..... for members to .....	Board
Mission	(What is the association's core business)	Board/assembly
Target groups	Members Leaders Decision making body Administration/headquarter	Assembly after suggestion from board
Strategy 20xx – 20yy	In the period 20xx – 20yy we want to: <b>A</b> <b>B</b> <b>C</b> <b>D</b>	Board
Goals 20xx – 20yy	To implement the above strategy our success rates for each strategic element are:  <b>A</b> Increase ..... by z % <b>B</b> Develop ..... For ..... members <b>C</b> Offer development opportunities for <b>D</b> reduce ..... By ..... %	
Key roles and positions for this period	Chief Executive (CEO) Chairman Deputy Finance Etc.	Board
Risk Assessment of the organization	A risk assessment of the organization carried out looking at positions and defining areas of high and low risk  E.g. what would be the risk to the organization if the Chief Executive or Chief Commissioner left?	Board

*continued overleaf*

Subject	Content	Responsible for implementation and revision
Substitution policy for key roles	<ul style="list-style-type: none"> <li>• Deputy fully informed</li> <li>• Substitute for the position</li> <li>• Tasks with shared responsibility</li> <li>• Decisions published among board or committee members</li> <li>• Decision database with shared access</li> <li>• Emergency plan</li> </ul>	Board
Talent pool strategy	<p>All registered (with confidentiality) talent pool members</p> <ul style="list-style-type: none"> <li>• Assess their potential yearly</li> <li>• Are offered a yearly appraisal interview</li> <li>• Are offered needed introduction, induction, and potential development opportunities according to competences</li> <li>• Have access to insight in own registered data</li> <li>• Have access to needed information to take over a responsibility according to potential</li> <li>• Can decide to resign at any given time</li> </ul>	Board – implementation delegated to a project group of trainers and facilitators
Talent development policy	<p>All registered talents for key positions are offered</p> <ul style="list-style-type: none"> <li>• At least one development (personal and task related issues) opportunity per year</li> <li>• Opportunity to take part in relevant meetings to be updated</li> <li>• Access to needed information (meeting minutes, decisions, activities) to be updated</li> </ul>	Board and administration/ headquarter

Subject	Content	Responsible for implementation and revision
Policy for important document management	<p>All information is registered and kept confidentially according to current laws and rules</p> <p>To avoid gaps and loss of information, a copy of key information is kept safely in 2 different places</p> <p>All emergency information is accessible for at least x persons at all times. These persons' contact details are public within the organization</p>	Board and administration/ headquarter
Any other comments and business		

## TARGET GROUPS

The groups that we are the most concerned with in a specific scenario- those that we wish to reach and to have understand us. Target groups in this publication relate specifically to decision making bodies on a national, regional or international level within WAGGGS.

## RISK LEVEL

Risk management is a validation system that has been used within WAGGGS and the World Centres. It is based on a scale of 1-5 (1 being the lowest risk (risky if you provoke it), 3 (there are safety instructions that are prepared and should be followed), 5 being the highest (don't touch- serious and immediate precautions need to be taken)) determining the seriousness and possibility of a specific risk. This system helps an organization to early on identify: how bad a situation is if it happens, and how big the damage may be.

(Please see section 8.1 on Risk Management in the WLDP Management Skills Module for further information).



## DEFINING KEY ISSUES, NEEDS AND POSSIBLE GAPS

Once you've decided on your organization's key strategic goals, you can define the competences and resources needed within and outside the organization.

### Leadership skills

The goal of succession planning is to bring in the right leaders at the right time.

You will find that you will need people with different qualifications, skills and personalities at different stages of future development. There is a lot of documentation on how organizations can identify the right type of person to fit the organization at specific moments in its growth. Here are a few examples of the different types of people you might need at various stages:

Situation	Key Leadership Factors
Rapid Growth	<ul style="list-style-type: none"> <li>• Sees alternatives</li> <li>• Embraces change</li> <li>• Communicates vision effectively</li> <li>• Identifies and uses talent</li> <li>• Delegates authority</li> </ul>
Turnaround	<ul style="list-style-type: none"> <li>• Short-term focus with long-term awareness</li> <li>• Stands ground</li> <li>• Clear and concise communicator</li> <li>• Motivates people</li> <li>• Generates solid team</li> </ul>
Dynamic Environment	<ul style="list-style-type: none"> <li>• Excellent knowledge of broad environment</li> <li>• Able to think out-of-the box</li> <li>• Comfortable with ambiguity</li> <li>• Passion for change</li> <li>• Creates sense of urgency</li> <li>• Motivates others</li> </ul>
Decreasing Membership	<ul style="list-style-type: none"> <li>• Positive attitude</li> <li>• Motivates people to see opportunities rather than threats</li> <li>• Creative</li> <li>• Able to think out-of-the-box</li> <li>• Enthusiastic</li> </ul>



### Discussion Point

Think about what skills are needed from leaders during times of:

- Rapid growth
- Change
- Dynamic environment
- Decreasing membership

### Establish a Timetable

It is important in succession planning to set up a chart that shows the current key positions and when each term finishes. This is the most transparent way of showing people the leadership needs of the organization. A tool such as a Gantt chart can be useful in this exercise.

**A Gantt chart** is a graphical representation of the duration of tasks against the progression of time. The chart is named after Henry Gantt (1861-1919), who designed his chart around the years 1910-1915.

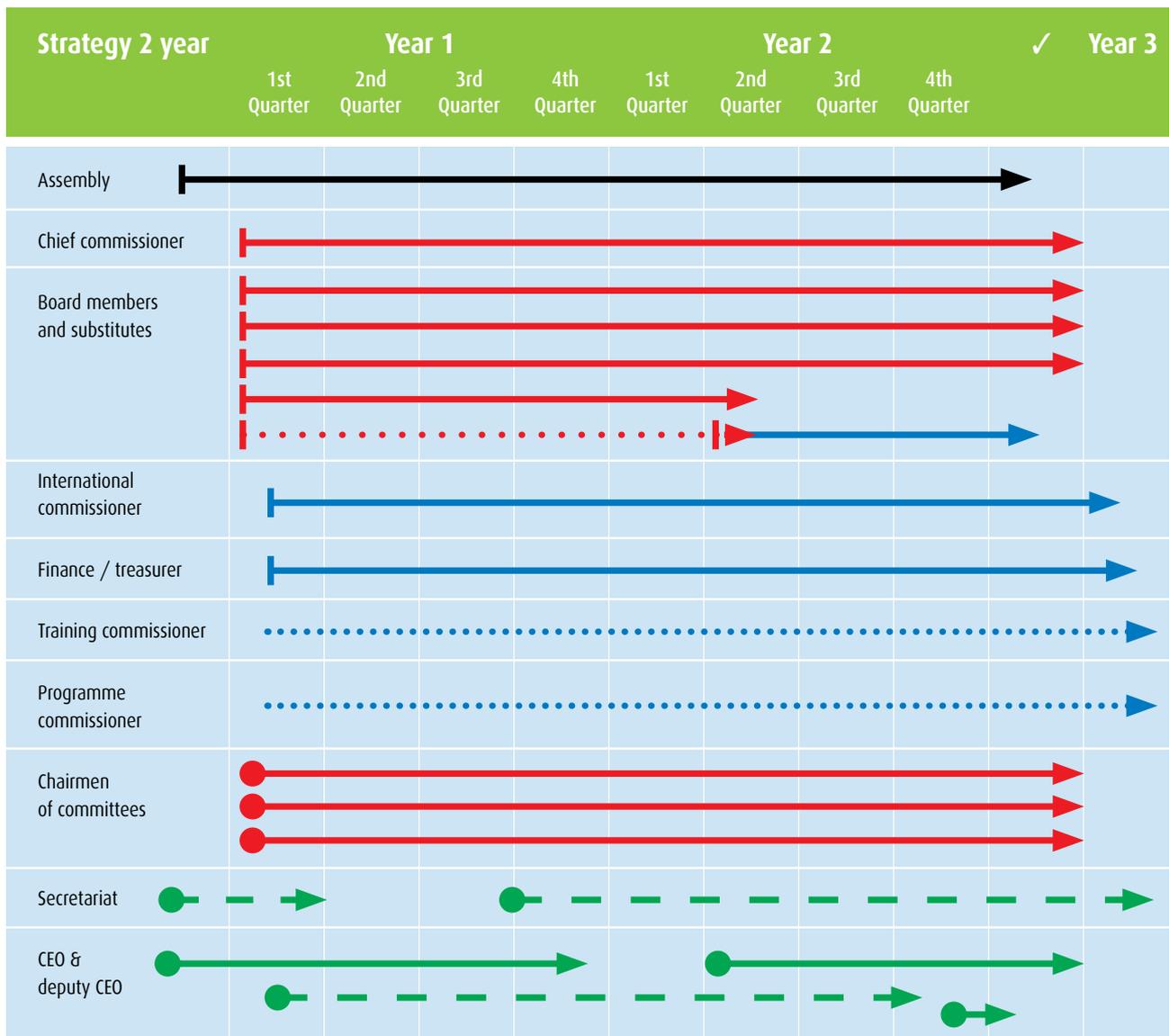
It is a useful tool for planning and scheduling tasks and projects. By using a Gantt chart, the organization can highlight key positions, the length of the term and when these positions need to be filled.

This timetable can help motivate your successor to move through their training program quickly and successfully, with a clear understanding of what the coming roles and responsibilities are going to be for the day-to-day operations.

Below is an example of a two-year Gantt Plan for key roles in an organization:

Colour code:

- Red:** Elected at the assembly
- Blue:** Appointed by the board
- Green:** Position applied and occupied by approval of the board
- Black:** Constitutional



A timetable is an easy way of visualising flow as well as spotting gaps in positions and activities. It also marks low activity periods – such as when elections are going on, and new boards are settling. This will allow the organisation to plan in advance and make sure there are activities ongoing to keep the organization alive.



## 3 RECRUITING TALENTS AND SUCCESSORS

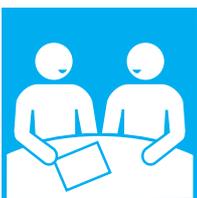


### Tip To recruit new members and leaders

- Identify roles in advance
- Identify needs and qualities
- Identify suitable candidates

There will always be people moving on to new pastures, looking for new challenges and inspiration. Organizations are always changing and they need new ideas, new perspectives and new approaches.

The challenge for each organization is to ensure that there are enough skilled people available to take the organization where it needs to be in order to achieve its vision.



### Discussion/ Reflection Point

Consider positions you have had in your association, in other volunteer organizations, or in your professional life. Which of these positions have been – in your opinion:

- Too long
- Too short
- Balanced

Consider the implications of each of the categories – the implications to:

- Yourself
- Your friends and families
- The organization
- The successor when you left

Finally, do the same reflection exercise about

- Positions where you were the successor – how was the previous position holder behaving and what were the results of this behaviour?

### Sourcing talent

All people have competences, potential and talent that can be used to enrich the organization. But where can you find the right people with the talent to serve in the different committees and task groups?

Here are a few examples of where you can potentially source talent:

- Government agencies, non-governmental organizations or foundations
- Colleges and universities
- Business communities
- Recommendations from key leaders
- Community leaders
- Parents and other social networks within communities
- “Skill bank” of young women who have had significant leadership experience within your organization

When looking for new volunteers or members consider:

- Does the person have to be a member of the association? Or could you benefit from an external person in the position?
- Would you advertise for or announce the position? Or will you only find people within your networks?



### Tip Approaching new volunteers

Research on recruiting volunteers shows that most people like to be asked rather than apply for positions themselves. This means that you should ask anyone who could potentially bring the skills you need, even if you think they wouldn't have the time. Maybe they are not motivated right now, but your offer is a great way to build relationships with potential volunteers for the future.

Invite potential talents to participate in national and / or international leadership development programmes. Taking part in a formal or non-formal organized leadership development programme can be invaluable. As well as great learning forums, they can be an opportunity for peers to network and share knowledge. A warm welcome in the organization can give a participant confidence to consider future roles and expand their networking if they do so.



## Discussion/ Reflection Point

### Talent Development

In what ways does your organization

- Source talent?
- Develop talent?
- Reward talent?
- Register talent?
- Appreciate and keep contact with talented people?



## Activity

Write down 10 names of people who are not presently involved in your association or group and who could be either involved or supportive in your search for new talent.

Ask these 10 people to do the same, and repeat this once more.

In only three stages of networking, up to 1000 people have been contacted.

Discuss the benefits of networking. People say that if we contact our personal network and ask each of them to do the same, and again, in eight steps we would reach the whole world. And WAGGGS provides a readily available global network of people all involved in Girl Guiding and Girl Scouting.

## How do we build a rich-talent organization?

The ultimate goal of succession planning is to have a 'growing pool' of talent that can be tapped by the organization at different times of its life cycle.

You can develop existing talent in your organization by:

- Writing job descriptions and development plans for critical positions
- Mentoring and coaching development programmes
- Providing training programmes for:
  - Individuals new to Girl Guiding and Girl Scouting
  - Individuals taking on new responsibilities
  - A leadership team facing change
  - Real experiences (learning by doing)

You can reward talent by:

- Honouring the contribution of past leaders
- Providing services that lighten the burden of leadership (e.g. childcare, job share and arranging meetings at times that suit people)
- Creating opportunities to broaden the individual's experience and perspectives
- Giving tangible yet appropriate rewards

## Top leadership is responsible for developing and encouraging a talent-rich organization

The value of succession plans is only realized through consistent implementation and commitment to leadership development. To ensure you have a strong, growing talent pool, you need to regard the retention of your potential leaders for key roles as a core responsibility within your organization.

**?** Did you know...

a personal thank you in some cultures is worth much more than a visible medal?

## EXERCISE

Use this exercise to decide how key roles should be managed and recruited.

1. For each of your main areas of responsibility related to your objectives and goals – decide which of the positions should be covered by:
  - People elected by the members or leaders in the association
  - People appointed by the board
  - People who apply and get approved by the board
  - Positions filled in by taking turns (randomly)
  - People who offer themselves for volunteering
2. Next, consider the terms and time periods for the key roles, and discuss if they could be overlapping or substituted when terms are ending.
3. Finally, consider how you ensure that key roles are always covered. Is it through
  - Co-chairing a role
  - Prepared substitutes ready to take over
  - Overlapping take-over procedures with mentoring

Record an overview of the role

- Think about the skills:  
« Must haves – Important – Nice-to-have »
- Record how much time is involved



## Discussion/ Reflection Point

### Successors – like those before or different?

Discuss how you would like your successors to be – like the ones they are taking over from, or someone with different ideas and talents able to take the group in a new direction?

## CHECK POINTS

Discuss how your organisation

- Appraises talents
- Spots talents
- Recruits leaders
- Retains leaders when they want to leave their positions.
- Makes sure there are as few gaps in positions as possible
- Ensures continued activities over election and re-organising periods

## Gaps in required competencies and talent

**Competence gaps:** During the above exercise, you may find that you are lacking some of the key competences and personnel needed to fulfil your goals. This could be an opportunity to search for people outside the organization or to arrange development opportunities within the organization.

**Talent gaps:** A talent gap would show that you have the experienced people who plan to (or according to your succession procedures should) resign shortly but not the people who could succeed the position in question. One approach could be to arrange a group of potential successors to be mentored by the resigning person.

**Human resource gaps:** Also, as you develop your strategy and your organizational operational plan, you may find that you need to develop or introduce new activities or technologies in your association. You may not have the competencies needed to lead on these new activities or technologies.

You will need to describe both the activity/technology and your proposal for needed competences, and create a plan for gaining the resources.

The gaps occurring should be addressed and noted in your succession planning. The gaps can provide an opportunity to be creative and think about doing things differently.



## Tip

### Everything is possible – if you wish

Positive thinking and optimism are good starting points when searching for new recruiting options.

- Believe in the positive potential in everyone
- Do not ignore shy, quiet people – they may have hidden potential and talents
- Do not say ‘no’ on somebody else’s behalf – maybe she has been waiting for your invitation to join a group or position
- Reduce any barriers that impact on an individual’s ability to make a meaningful contribution
- Provide a supportive environment for people to grow and develop

## Choosing a successor

You have a talent pool of potential successors for a key position, but how do you choose a successor? How do you ensure that the right person is elected to the right position?

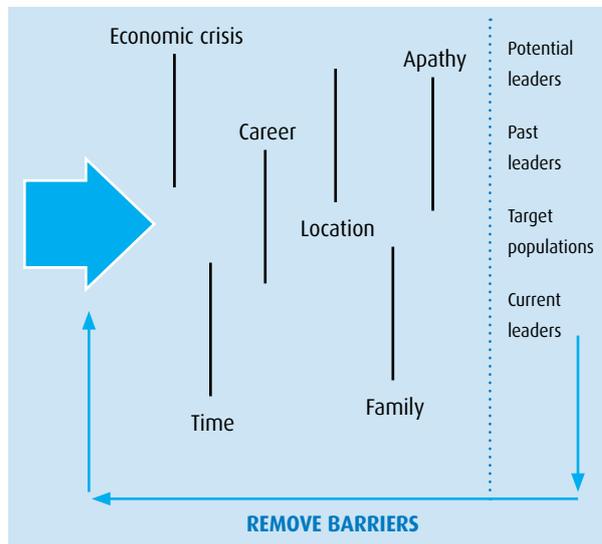
You will need to think about anyone who potentially has the skill and ability to lead a group, a project, or a task. If you have difficulty narrowing the field, you may want to seek the advice of your board, or put together a ‘search committee’ to help you select a successor. These two approaches will enable you to seek the opinions and advice of others when making your decision.

It is not good practice for individuals to personally choose their successor. The accepted procedure is to elect people to the different positions (and in some special cases, appoint). This process gives people the authority and accountability and credibility to serve in the new position

## What are the barriers to developing/recruiting leaders?

- We think no one else can do what we can do
- We presume people do not have enough time to take on new jobs or that they are not interested
- The job may require too much time for anyone to do it
- We make assumptions about what people are interested in doing and what they are prepared to offer
- We have not clearly defined the needs of the role
- We are not clear about the person profile and therefore do not find the right person
- We frighten people by describing jobs that appear to be too large
- Expectations may not be clear, either on the side of the organization or the volunteer
- We do not have a plan that tells us when we will need a new person for a specific job
- We are too busy to plan for the next stage
- We have no procedures to support people

## Barriers to potential leaders



## SCENARIO

### Process of recruitment for a board member

#### Election procedure

- In March, but functions start in September
- Six-month period of joint work where new team shadows the old in the day-to-day life
- Terms do not start and end at the same time so everybody doesn’t leave at the same time

#### Resource people

- When needed, a mentor or external help can be appointed to support a new member (could be the previous holder of the function)
  - Clear mission and length of term of office

#### A day in a life of a board member

Some time before the deadline for appointing candidates for a board, the existing board can invite potential candidates to ‘open meetings’ so candidates can observe some board meetings. The potential candidates can also be invited to shadow a board member for a period of time if this is realistic for the organization.



### Tip

When choosing a candidate for any position, consider the following

- Leadership qualities
- Personality
- Visionary
- Ability to gain respect of others
- Belief in mission and values of organization
- Respect and trust from others
- Specific skills (e.g. training, program development, strategic planning, marketing)
- Look inside and outside of organization
- Identify more than one person for any one role



### Tip

When making election procedures for leaders and board or committee members, it is useful to consider

- Whether all members should be elected at each election time, or half of the members are to be elected at each election time, with two overlapping periods;
- Whether substitutes are being kept informed so they are ready to take over vacant positions. This could be done by:
  - Giving them meeting minutes and agendas;
  - Asking them to take part in meetings without decision making;
  - Giving them the opportunity to shadow a board member in the meetings leading up to her time of taking over.

**Overlapping makes the organization stronger**

## SUGGESTIONS FOR PUTTING TOGETHER A RECRUITMENT PLAN

### Recruitment procedure

- Create a guideline for recruitment of specific functions
- Profile, Where to find, when to contact

### Job description and person specification

- Split into: Essential – Desirable - nice-to-have – personal initiatives
- Main responsibilities
- Time involved

### Tools and resources

- Use Guide of adult resources
- Explain main challenges they can expect
- How to work with the resources
- Where to find the information

EXAMPLE OF SUCCESSION PLANNING STRATEGY & EXPERIENCES, GUIDISME ET SCOUTISME EN BELGIQUE

## CHECK POINTS

- How many board members are sufficient – minimum and maximum?
- How many substitutes should be ready for an election period?
- How long should an election term be? 1 - 2 - 3 - 4 - more years?
- Should a person be elected for 1 or more terms, with half or a part of the committee/ board elected at each election?
- How many times should it be possible to re-elect a person?
- Is there any difference in the maximum length of a position period according to volunteer or paid positions?
- For employed staff care should be taken to respect the employment laws
- Who is responsible for sufficient candidates before an election?



## 4 TRAINING TALENT AND SUCCESSORS

To develop a successful training program for a successor, you will need to identify the critical functions of the group and task.

### ASK YOURSELF:

- What is the task that needs to be done?
- Who are the best people to do this - what skills are needed?
- How long will it take?
- What is the desired end result?
- Who will benefit?

Training and development can be approached in a number of ways, i.e. through:

- A Mentoring / buddy system
- Aligning development plans with written job descriptions for critical positions
- Developing training programmes for
  - Individuals new to Girl Guiding and Girl Scouting
  - Individuals with new responsibilities
  - Young women with leadership potential

It is a good idea to have your successor work in each of the key areas of the task. Immerse your successor in the position so she sees both the depth and breadth of the operation. This may sound simple enough, but there is a certain amount of 'letting go' that goes along with inducting your successor by allowing them to learn, grow and make mistakes before assuming the helm.

By giving the successor the opportunity to question the present procedures, you are giving them space for creative thinking and new perspectives. This process will help the new person to assume ownership of the new role.



*The right person is identified – then what?*

### Tip

Provide opportunity and time for the following:

- The mutual exchange of expectations
- Consult on major decisions
- Allow person to be an observer at major meetings
- Opportunity to work on their own
- Support their decisions and provide constructive feedback
- Provide training as appropriate (identify skills required for the role and facilitate the training of these where necessary)

### Taking on a leadership role

Here are some steps that you could take to ensure new leaders have all the support and information they need when starting a role.

#### Recording experiences of new leadership role

Personally recording what they've learned from their experiences and how they overcame challenges can be valuable for both departing - and new leaders - and so that successors can learn from this experience. This documenting of information and its' value to the organization is covered in more detail later in this section under knowledge management.

Areas to document include:

- The tasks and challenges of the leadership role
- What you have learned
- How you do things
- What could be improved
- Your questions and challenges to the status quo



### Tip

In writing them down think about how you would explain your role and those challenges to somebody who takes on this position in the future.

## Shadowing

Elected successors can shadow the previous position holder for a period of time to learn from their experience.

### Example:

*In the African Region, Board Members are elected six months to one year before they actually take over the position. In that period they follow and shadow another working Board Member to be ready to take over.*

## Mentoring

An experienced leader's role is to support the successor in her first period of leadership. In the case of Board Members, the resigning Board Member is proposed as a mentor for the successor to ensure continuing work. The mentor supports the new leader in their development in a supportive and constructive way.

### Examples:

*In Europe Region, some of the newer associations from Central and Eastern Europe have been mentored by the more experienced associations. This is done via board-to-board or Commissioner-to-Commissioner relationships. The more experienced associations have also learned something about organization, membership and leadership by being questioned on their habits and traditional structure.*

*Another example of mentorship in Europe includes the handover process of International Commissioners (IC), where the newly-appointed IC's are mentored by a more experienced IC.*

## Coaching

A coach can be offered as a development and support mechanism. Their role can be to help motivate and guide the new person and provide a space for them to share and reflect on their tasks and procedures as well as their experiences and any challenges or anxieties.

## Courses

A group of talented people who are appointed can be offered courses focused on developing their talents. This will ease their entry into the new leadership position. Once they have started this role, this initial training should be followed up by a tailor made training on the specific tasks associated to their position.

## Job share

In this situation, two or more people share a position and the tasks so that they can easily take over for each other during leave or when one person leaves.

## Co-chairing

In this situation, two people carry out a task or hold a position together. This allows for a more well-rounded perspective on events and diversity in activities. This method of sharing responsibilities is another way of ensuring effective succession planning.

## Networking

Networking between peer leader positions provides an opportunity to share and learn from each other – and support each other. National, regional and world events offer opportunities, space and time for this networking to take place.



### Tip

Very often when committees or project groups have finished their tasks, the group members keep in touch and keep each other updated on what is going on. These networks are a valuable commodity, as they can be contacted in the future for advice on new tasks too.





## 5 THE HANDING-OVER PROCESS

Succession planning is like a relay race...



The relay runners form a team where one runner hands over the baton to the next runner. A good performance requires all runners at the end of their turn to keep up the speed until the baton is handed over, and all runners starting their turn have to start before they are met, and to be on speed when handed over the baton.



### Did you know...

In his book 'Succession. Are you Ready' (2009) the author Marshall Goldsmith describes how popular network meetings with former business Chief Executives, amongst these Frances Hesselbein, the ex-CEO of Girls Scouts of the USA were motivating for others to take up volunteer roles and charity tasks when retiring from their paid jobs of a different kind. Frances Hesselbein founded, and is now chairman of, the Leader to Leader Institute.

A well thought out and supportive handover process is vital for a smooth transition from the existing to the new leader. The next session looks at some of the areas you will need to cover when planning the handover:

- On the job training
- Support for successor
- The exit strategy
- Knowledge management

### On-the job training

On the job training means that the retiring person can hand over the task in an accessible and informative way, introducing the successor to the role, the responsibilities, new colleagues and the existing systems and procedures. On the job training can be supported with seminars and courses but the 'learning by doing' is an essential part of the process.

### Support for successor

Once your successor has settled into their new position, you will need to be prepared to let the successor carry out the role for which she has been trained. You can lay the groundwork, provide the training and establish an organizational culture that reflects the values of your association for the successor. From there, the senior management and board members are the monitoring and support system for the successor and for the organization. This means preparing to step back for the person retiring.

The 'exit strategy' – Leaving the stage for the successor to take over the role



The above table helps us to understand the increasing awareness and responsibility of those involved in succession planning. At the beginning, the person currently holding the position has responsibility for the majority of the work and as time passes, the responsibility is handed over to the next person.

Planning how long you are going to stay in a position is one thing, but preparing yourself for handing over the tasks in a useful way is even more important. The easiest way to prepare this is to document what you are learning yourself while in your position. It is also important to outline a plan for the transition which can be referred to throughout the handover process.

When the successor is in post, it can be tempting to compare them with others. Remember that each person has their own unique style, which will bring different qualities and talents to the organization.

### Knowledge management

The capturing of organizational information and knowledge held by an individual is an essential part of the handing over process. This is often referred to as knowledge management.

### Definition

**Knowledge Management** comprises a range of strategies and practices used in an organization to identify, create, represent, distribute, and enable adoption of insights and experiences. Such insights and experiences comprise knowledge, either embodied in individuals or embedded in organizational processes or practice.

Documenting procedures, practices, learning and insights is a good way of securing the accumulated knowledge within your association.

## Some emotional reactions to the handing over process

*“From being busy with many tasks as a specialist → stepping backwards and listening/observing as a mentor”*

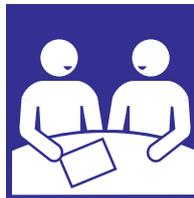
Handing over the baton means giving up power – and to some people this can be a relief and to others, a loss of power feels like stumbling, falling – and not being able to rise up again. Losing power can also mean having little or no influence on matters related to the organization.

However the opportunity to impact on other peoples’ lives is something that does not necessarily decrease, especially if you maintain your relationships and the networks created, and make constructive contributions to the community around you.

The emotions for people leaving positions should not be overlooked or minimized – a way of helping the retiring person is to let them express their emotions in a supportive and confidential place with people who understand what they are going through.

- Coaching can also be a tool which provides a personal space to understand and come to terms with the mixed feelings they may have about leaving.
- Plan to include them in an (already) established network of ‘retired’ people; this gives the person an ‘exclusive club’ to look forward to. In the future they can be a valuable resource as:
  - Consultants
  - Mentors
  - Substitutes representing busy present members
  - Starters of new projects
  - Ambassadors for your association

If there are any negative feelings, try to sort them out internally and do not allow misunderstandings to damage the image of the association, or the person. People should leave an organization with a sense of accomplishment, fulfilment and that they have been part of something that has affected positive change.



## Discussion/ Reflection Point

Think of a particular procedure or practice in your organization. How would you transfer the knowledge associated with it to someone new taking over? Use the following questions / categories to guide your discussions.

- What is most important – should be shared in all key positions (‘must know’)
- What is very important for many people – should be accessible for a defined group (‘need to know’)
- What should be revised according to new procedures (‘need to know’)
- What should be updated with new names and contacts
- What may be important and could be filed away (‘nice to have’)
- What is important to have at the back of your mind when moving on (‘nice to know’)
- What is no longer durable and valid – and should be deleted

## CHECK POINTS

Does your organisation

- Arrange networks for those leaving their positions?
- Arrange for handover meetings?
- Appoint the leaving person as a mentor or ambassador?
- Make and continue contact with people who have left?
- Have important information and knowledge documented?



## Tip

Handing over offers a good opportunity to reflect on information and categorise under:

- ‘Must know’
- ‘Need to know’
- ‘Nice to know’



## REVISION OF THE SUCCESSION STRATEGY

A good succession strategy is revised regularly and plans are adjusted in line with:

- The vision and new prioritization of goals (keep in mind human resource needs may have also changed)
- Talents that have been developed, moved up or left the association
- Talents that were meant for one position, but might have taken up another task
- New talents and areas of interest that may have developed
- Projects that are delayed, postponed, cancelled, or are being developed

When defining, describing, and revising your strategic documents try to be critical and imagine your organisation in three, five and then ten years time. Is the succession strategy still relevant, or does it need some changes, either now or in the future? If in the future, set a new revised date.

Along with the revision of the strategy and any adjustment of the timetable, all resources involved in the revision should be contacted.

*In this race, you - as the baton carrier - need to balance two priorities that often... conflict with each other. On one hand you need to produce short-term results, On the other hand, you need to do what is in the best long-term interest of your organization.*

MARSHALL GOLDSMITH  
SUCCESSION. ARE YOU READY? (2009)

### CHECK POINTS

Think of three different position changes in your association, tell the stories and discuss

- What was successful in each situation?
- What were the actions and conditions that formed this success?
- What would you like to register as a rule or principle of your association's succession strategy?
- Did the changes require a revision of the constitutions and byelaws?

## RECAP

WAGGGS model of succession planning is based on a metaphor of seven cogwheels. The central wheel stands for a 'Succession Plan Strategy' and the six surrounding wheels below are the elements that make the succession plan work.

### 1 Vision and strategy

### 2 Defining key issues, needs, and possible gaps

### 3 Recruiting talent

### 4 Training and developing talent

### 5 Hand-over process - monitoring and appraisal

### 6 Revising the Succession Strategy, and repositioning talent for new challenges

We hope that the model provides a useful tool for thinking about and planning your organization's succession strategy and plan. The goal is to ensure that all of the wheels are working in harmony together, at all times.

## SUMMARY

In summary the Five Core Principles that underpin Succession planning are:

1. Succession planning is driven by strategy
2. The goal of succession planning is to bring in the right leaders at the right time
3. Succession planning is a team-driven collaborative process
4. Succession planning is a continuous process
5. Top leadership is responsible for developing and encouraging a talent-rich organization

Key points to success in succession planning include:

- Strategic needs that are matched by corresponding knowledge, skills and abilities
- Recognition of the internal and external forces that present challenges and opportunities
- Establishment of a small, high level team accountable for succession planning
- Ability to seek and respond to feedback on leadership experience
- Ability to fulfil mutual expectations for support and development
- A clear definition of roles and responsibilities
- Clear planning and time lines throughout the process

### KEY POINT

Think of succession planning in terms of a business. Without succession planning, a business that has become successful can just as easily fail. The business grows partly because there is a leader with experience, drive and ability. Without proper succession planning, the future success of the business is not as secure once that leader has gone. With so much at stake, succession planning has to be a priority and should be part of every organization's strategic plan.

## CONCLUSION

Succession planning is an essential business activity of any progressive, successful and growing organisation. In thinking about an organization's growth stability and development, the next generation of leadership has to be continuously planned for and its' future leaders prepared. Organizations that do not plan for succession risk the chance of stagnating and miss opportunities to recruit, retain and develop existing and new talent.

In today's changing world with economic pressures, changing life demands, and individual expectations, volunteer organizations will need to think of creative and supportive ways to recruit and develop its' future leaders. Clear visions, strategies and processes will support organizations undertaking this challenging but vital task. We hope this resource has been useful in providing you with useful information, guidance and tools and will be an ongoing reference in your succession planning.



# Appendix 1 Bibliography

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Butterworth-Heinemann

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## REFERENCE MATERIAL

- WAGGGS Leadership Development Programme module Setting Direction. Section 8 Succession Planning
- The special section on Succession Planning in the WLDP module Setting Direction is dedicated individuals who want or have a need to learn about Succession Planning; this publication is dedicated national organizations, regions and other organizations who want to develop a strategy for succession planning as part of the organizational framework
- WAGGGS' Guidelines on Structure and Management of Associations
- WAGGGS: How to.... A Guide to Constitutions (2009)
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- WAGGGS Training Guidelines: "Identifying Adults with Necessary Skills to Meet the Needs of the Association", pp. 7-10
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(<http://archive.amol.org.au/recollections/5/pdf/volunteers.pdf>)

The Urban Institute, USA: Volunteer Management – Practices and Retention of Volunteers ([www.urban.org/UploadedPDF/411005\\_VolunteerManagement.pdf](http://www.urban.org/UploadedPDF/411005_VolunteerManagement.pdf))

## OTHER LINKS

[www.businessperform.com/html/succession\\_planning\\_process.html](http://www.businessperform.com/html/succession_planning_process.html)

[www.cipd.co.uk/hr-resources/factsheets/succession-planning.aspx](http://www.cipd.co.uk/hr-resources/factsheets/succession-planning.aspx)

[www.strategicleveragepartners.com/bhg768kjmhgvyxzwq/National\\_Study\\_of\\_Board\\_Governance\\_Practices\\_in\\_the\\_Non-Profit\\_and\\_Voluntary\\_Sector\\_in\\_Canada.PDF](http://www.strategicleveragepartners.com/bhg768kjmhgvyxzwq/National_Study_of_Board_Governance_Practices_in_the_Non-Profit_and_Voluntary_Sector_in_Canada.PDF)

## OTHER MATERIALS

How to Build Successful Teams. The Belbin Way (1996) (CD-Rom)



# Appendix 2

## SUCCESSION PLANNING STRATEGY TEMPLATE

Subject	Content	Responsible for implementation and revision

### ORGANIZATIONS

- Election/appointment periods
- Talent spotting
- Candidate selection and appointment
- Upgrading talent
- Overlapping positions
- Revising traditions
- Documentation and registering the knowledge

### INDIVIDUALS

- Time resources
- Motivation
- Handing over
- Finding other interests
- Introducing or suggesting yourself to interests

#### 1 VISION AND STRATEGY

Vision → mission → objectives → goals  
 For each goal describe

- The ideal situation
- The worst case
- The risks
  - Consequences of each risk
  - How to prevent or minimize the risk
- The implications to other goals
- Number and characteristics of the key roles responsible for each goal

Prioritize the key roles/areas/goals in your association

#### 2 DEFINING KEY ISSUES, NEEDS AND POSSIBLE GAPS

Tasks for the position

- Needed knowledge
- Needed skills
- Needed experience
- Personal competences
- Other benefits
- Network

Areas of attention – missing resources or competences to be developed  
 Timeline/plan for the development of the gaps discovered

#### 3 RECRUITING TALENT AND SUCCESSORS

Describe

- Where you can find your talent
- How you will choose successors
- What barriers you might prevent – and how

Create a talent pool

#### 4 DEVELOPING TALENT AND SUCCESSORS

Create a development plan including

- On-the-job training
- Off-the-job training
- Networking and peer exchange opportunities

#### 5 HANDING OVER PROCESS

- Make a plan for the start
- Install the successor
- Sort out procedures and documents
- Decrease the tasks for the predecessor and increase the tasks for the successor
- Consider how to provide personal support

#### 6 REVISING THE STRATEGY

- Step by step revision
- Adjusting to constitution
- Adjusting procedures

# Appendix 3

## SUCCESSION PLANNING IN MEMBER ORGANIZATIONS AROUND THE WORLD – SOME EXAMPLES

Here are some examples of elements or full Succession Planning Strategies – from different parts of the world. These could be used as inspiration for future national succession planning strategies:

### AFRICA REGION

#### Girl Guides Association of South Africa

##### BENEFITS OF SUCCESSION PLANNING

- Continuity – pass on skills and knowledge
- Recognition of aspirations – opportunities to take on other roles
- Leadership development and Capacity Building
- Young blood in – new ideas
- Opportunity to tap youthful talent

##### IMPORTANT TO KNOW WHERE WE ARE GOING AND WHAT WE WANT TO ACHIEVE

- Good planning
- Develop a realistic strategic plan
- Good communication
- Everyone on board

##### PROCESS

- Clearly defined Constitution
- Workable, laid down structure
  - Terms of office
    - » Clearly defined
    - » Strictly adhered to
- Elect period
  - Up to one year – easing into the job
  - Work hand in hand with retiring member
  - Understanding of what the job entails
  - Skills and knowledge transfer

##### MEET THE ASSOCIATION'S NEEDS

Requirement:

- Youth member on every Committee
  - Ensure decision making by the youth
  - Leadership empowerment

If required:

- Chief Commissioner's nominee
  - Ensure diversity
  - Capacity building
  - Leadership empowerment
  - Select right person for the job

##### SYSTEMS IN PLACE

- Good administration
  - Records indicating
    - » Date of first term of office
    - » Date of second term of office
    - » Calendar diary
  - Nomination process
  - Warrant or Card of Appointment
- Identification of candidates
  - Invitation
  - Recommendation
  - Personal desire

##### SUPPORT PROCESS

- Mentoring
  - Opportunity to devise a programme for knowledge, skills and leadership development
  - Nurturing and support
  - Confidence building
  - Provides satisfaction for mentor as she sees her mentee grow

##### ASSESS PROGRESS AND DEVELOPMENT

- Performance assessment
  - Mentoring process – keep in touch
  - Capacity building – avoid sink or swim
  - Ongoing nurturing – caring interest
  - Give recognition - awards system

*As an example of use of the Succession Planning Strategy above, the Chief Executive Officer of Girl Guides Association of South Africa has worked together with her appointed successor in the job two years ahead of her retirement.*

## ASIA PACIFIC REGION Girl Scouts of Japan

### WHY SUCCESSION PLANNING

- To be a sustainable organization
  - continue to focus on the Vision/Objectives at the time of transition
- To provide opportunities for the young generation to gain experience in management of organization
- they gain self-esteem and develop their potential
- To be an organization that listen to the voices of girls and young women

### PRESENT NATIONAL BOARD (2009-11)

- Considering "Balance" of the members:
  - Different age, experience, profession

	2009-2011
Under 35	2
36 - 49	3
50 - 59	1
60 - 69	4

### PRESENT REGULATION WAS ESTABLISHED APRIL 1991

- Independent selection committee (avoiding arbitrariness)
- Transparency of the process from selection of candidates to election
  - Recommendation by members
  - Election at the General Assembly
- Length of the term
  - 2 years/term

### IN THE MID 90'S, THE ASSOCIATION HAS TRIED...

- To increase the number of young leaders' participation in the decision making process at the national level
- To nominate young member on the Board by adding a young member in the Board Member Selection Committee

However... the effort failed. The nominated candidates declined to run for the election, because they felt they were not supported enough by the local council or by the senior members within the association and felt a strong pressure to represent youths. So a process was decided:

- 2000 "The national board should have members under the age of 35"
- 2002 Revision of Rules of Selection of the National Board Members:
  - Ratio of number of board members by age was specified
- 2003 Election of Board members for 2003-04:
  - Candidates under 35: 1 (elected)
- 2005 Election of Board members for 2005-06:
  - Candidates under 35: 1 (elected)
- 2007 Election of Board members for 2007-08:
  - Candidates under 35: 3 (2 elected)

2009 Election of Board members for 2009-10:  
Candidates under 35: 2 (2 elected)

Resulting in visible decrease of average age in the national board.

### ORGANIZATIONS INVOLVED IN ELECTION OF NATIONAL BOARD MEMBERS

- General Assembly
- National Board (NB)
- 47 Councils
- Board Member Selection Committee (BMSC)
- Election Supervision Committee (ESC)

### TIME FRAME FOR ELECTION PROCESS

May year X-1:

Elections of BMSC members at general assembly

Aug – Sept year X-1:

BMSC asks councils to recommend members as Candidates for the NB

Nov – Dec year X-1:

BMS asks members to be candidates

Feb year X:

Election of NB members operated by ESC

Mar year X:

Decision of role of each NB member by mutual vote

Mar year X: New NB starts

### FOR SUSTAINABLE ORGANIZATIONAL OPERATION

- Observe the rules  
(Rules of election, members of executives/ committees, decision making, age limit and fixed- terms)  
**make no exceptions without a good reason**
- Exemplary democratic organization
- Try to garner suggestions and opinions from councils in each step of the process
- Training for board members by board members (To share experiences with each other)
- Support for the National Board by Advisor's Meeting and Friends of The Board
- Training for administrators
- Rules for selection of executive members in councils
- They have similar rules of fixed terms or times of appointment as GSJ's
- Each council has an executive member selection committee

## ASIA PACIFIC REGION Girl Scouts of Japan

### EFFORTS TO DEVELOP YOUTH OF THE NEXT GENERATION

- Sending youth delegations to every world conference and AP regional conference since 1972
- Sending Girl Scouts to overseas programs ( - 2001 by GSJ, 2001- by council or as individuals)
- Sending participants to JLS, HLS (every year since 1997: GSJ encourages them to participate in national programs afterwards and to be candidates for executive posts)
- Providing opportunities for experienced youths to utilize their experiences in various programs as members of organizing committees
- Encouraging them to be members of Standing Committees at the national level

### INVOLVING GIRLS POSITIVELY

- “Fureai no hi” (Girl Scouts day) (Suggested by Ranger Girl Scouts at the Girl Scouts National Gathering in 1986)
- Ranger girl scouts became members of the steering committee of the Ranger National Camp in 1989
- Nowadays, most programs for girls such as the Girl Scouts District/ National Gathering, cultural exchange programs with UK/Korea or other programs involve girl scouts as members of the organizing committee, and they gain experience in planning and management

### CONCLUSION

- ‘Age’ should not be the barrier for both Young/Old
- Each person’s abilities and commitment should be the key factors for the selection of the NB members
- Securing the rule-based democratic and fair nominating process is necessary
- It is important to support the young members to fulfill their responsibility by accommodating to their needs



## EUROPE REGION Guides Catholique de Belgique, Belgium

### SUCCESSION PLANNING IN GUIDES CATHOLIQUE DE BELGIQUE IS

- Part of the job description of key positions
- Using the job description to select profiles and explain clearly the work load, the requirements of the function... (designed as a kind of realistic advert for the function)
- Encouragement to think of succession strategy as early as possible in the term
- There are “procedures” and “manuals” to help people get started in their function (Vademecum du cadre)
- The association can extend the term with one year (after a vote in the assembly) to finalise the succession (find a person or run an induction period with a new person if they find it useful)
- Introduction of flexibility in the structure to arrange terms in function of possible needs of new candidates
- “Resource Persons” – those are functions for people who want to get involved but without taking on a full term. They have to be elected for a specific mission. This enables to devote some tasks to people who want a limited commitment and lightens the workload for official functions. It also gives the possibility to gradually involve people who are afraid to start straight away with a “heavy job”, and afterwards they can candidate for more.

### RESPONSIBILITY FOR SUCCESSION PLANNING

- Each person in a key position is responsible for her own succession
- The whole team is involved to identify potential candidates – as are the previous persons who exerted the function (for example, a new candidate or potential international commissioner will meet 1 or 2 previous international commissioners to discuss about the function).

### CHALLENGES AND THE RESULTS OBTAINED?

Making sure that people keep succession planning in mind before it is too late! – Not everybody is as structured to do it really well.

The association is currently inducing a new candidate International Commissioner – she has met 3 former IC, has been informed through the job description and accepted the task. She accepted under the condition she could contact the association for sensible matters (and might join the training for new national board members).

The same process has been run for the President of the association and for the previous one. The process made it possible to find a new candidate within a short term.

## EUROPE REGION Ukraine, Slovakia, Macedonia, and Latvia

The relatively new associations – both WOSM and WAGGS associations – in the Eastern Europe have co-operated through a project “Leadership Capacity” on developing tools and events for developing and increasing leadership capacity in the participating countries – with the purpose of strengthening the associations. One of these tools is ‘Long Term Human Resources Planning’ with contents and programme for a weekend seminar on Succession Planning.

## WESTERN HEMISPHERE REGION The Girl Guides Association of Dominica

An example of a Succession Plan Strategy and the revision of this:

### SUCCESSION PLAN STRATEGY (2008-2010)

In order that the Girl Guide Association of Dominica is able to function meaningfully and that our young members are ready to accept responsibilities in various roles / offices in the Association, the following actions would be taken:

- Invite resource people to become members of the Association.
- Identify members who could fill in the vacant posts.
- Identify officers/persons who should be nominated to fill existing posts of the Association at the next triennium 2010 – 2013
- Encourage more participation among the patrols of all units in decision making (Use quarterly evaluation ) – increase more youth representative on the Executive (increase to four)
- Nominate one young person to understudy each existing post and inform them of their responsibilities. Job Description). Provide training in the various roles, and Self Development skills
- Introduce a mentoring and monitoring process in the Association
- Provide a series of training sessions to prepare prospective Trainers for assessment as Local Trainers.

The important key positions in the association were understudied and evaluated, as were some proposals for action for ensuring the future of the position.

A training plan for each key position was described and implemented.

Those variables affected above. Some of the young people

- went to study
- Migrated
- Worked odd hours

The system was good but did not work out to GGAD's expectation. The association therefore had to begin recruitment of skilled persons to fill in vacant positions.

The association also had to amend the training plan to reflect the various levels of the training scheme in order to ensure that every member in the association experience growth and development.

A study of rotation of executive positions was carried out.

### STRATEGY USED FOR SUCCESSION PLANNING 2010-2013

In order that the Girl Guide Association of Dominica is able to function successfully that officers commit themselves to their responsibilities, and contribute meaningfully to the movement, the following actions were taken:

- Invite resource people to become members of the Association.
- Identify members who could fill in the vacant posts.
- Identify officers/persons who should be nominated to fill existing posts of the Association at the next triennium 2011 – 2013
- Involve more young women in decision making (Use quarterly evaluation) – increase more youth representative on the Executive (increase to four)
- Continue the mentoring and monitoring process in the Association.
- Continue the training sessions of prospective Trainers for assessment as Local Trainers.

# LESSONS FROM GEESE<sup>1</sup>

Succession planning is a natural part of an organization's growth and development. In nature, geese exhibit this process including group dynamics, challenges, and team work visually.

As each bird flaps its wings, it creates 'uplift' for the bird following. By flying in a 'V' formation, the whole flock adds 71% greater flying range than if the bird flew alone.

• **LESSON** *People who share a common direction and sense of community can get where they are going quicker and easier because they are travelling on the thrust of one another.*

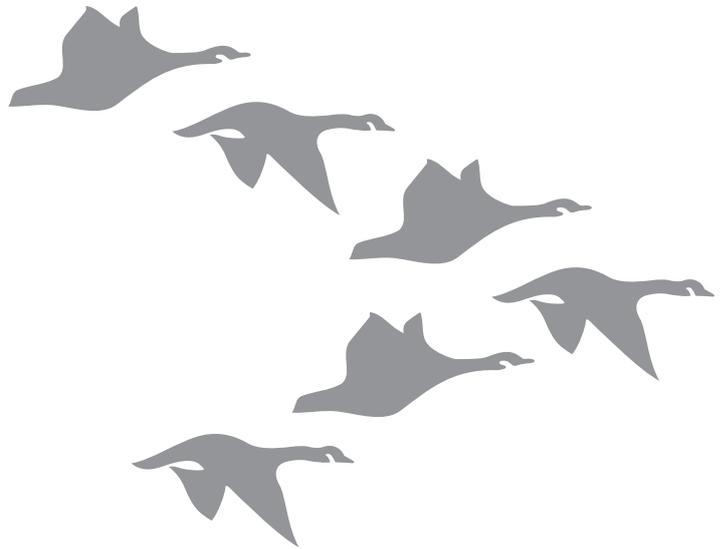
Whenever a goose falls out of formation, it suddenly feels the drag and resistance of trying to fly alone, and quickly gets back into formation to take advantage of the 'lifting power' of the bird immediately in front.

• **LESSON** *We should stay in formation with those who are headed where we want to go and be willing to accept their help.*

When the lead goose gets tired, it rotates back into the formation and another goose flies at the lead position.

• **LESSON** *It pays to take turns doing the hard tasks and share leadership - we are interdependent. No-one can go on - nor will lead - forever, and everyone at times take turns riding at the back.*

The geese in formation honk from behind to encourage those up front to keep up their speed.



• **LESSON** *We need to make sure our honking from behind is encouraging - and not aggravating.*

When a goose gets sick or wounded or shot down, two geese drop out of formation and follow it down to help and protect it. They stay with it until it is able to fly again or dies. Then they launch out on their own, with another formation or catch up with the flock.

• **LESSON** *We should stand by each other through the tough and the easy times.*



## Discussion/ Reflection Point

Consider how many of the 'geese lessons' you automatically use, and which of these could easily be implemented in your association

<sup>1</sup> Milton Olson



