**Succession Planning Policy**

The purpose of this Succession Planning Policy for NAIFA-[Insert Chapter] is to ensure that the Chapter has a full and continuous compliment of volunteer leaders to continue to chart the course of the organization.

To aid in this process, the Chapter shall maintain a comprehensive list of all potential volunteering opportunities and clearly denote those that are most critical to their continued success. In the first column of this chart, should be a listing of the positions, followed by the person who currently serves in the role, with two to three additional columns with the name(s) of individuals who could serve in future years or in the event of a vacancy. A template for this chart is included at the end of this document.

The Chapter shall also have a well-regulated Governance or Nominating Committee, whose task is not only to put together the slate of leaders to serve in the coming year, but to also cultivate potential volunteers for all positions going forward. While there are many reasons that it makes sense to have leaders repeat terms in their roles from time to time, it is generally in the best long-term interest of the Chapter to build and maintain a continuous pipeline of new leaders that matriculate through the ranks of leadership. This happens by being flexible and eagerly welcoming new ideas, different approaches and engaging leaders to make a difference early and often in their tenure, while also keeping the time and responsibilities manageable in observance of their busy schedules.

Remember that a pipeline of volunteers must be carefully developed and curated. People are increasingly protective of their time and where they choose to invest it. They will need to be cultivated over time, engaged to learn more about the Chapter and introduced to Chapter service and grown into more extensive roles. They must also find it rewarding and fun. The more that can be done to entice them to want to volunteer, rather than being obligated to do so, the stronger the results will be.

The five key elements of the Chapter’s Succession Plan are as follows:

1. **Preparation**
   1. Spend time talking to individual members, getting to know them, their interests, why they joined and what they hope to get out of their membership. Attempt to get them all actively engaged by serving on a committee or interest group to expose them to Chapter operations, communications and strategic efforts.
   2. Invite committee members, and even more importantly, committee chairs to attend Board meetings to expose them to Chapter governance and operations.
   3. Include succession planning as a recurrent agenda item for discussion at Board meetings.
   4. Develop and fill smaller “gateway” and micro-volunteering opportunities to continuously engage potential future leaders.
   5. Create and publish position descriptions, along with anticipated time commitments, for all positions. Employ the position descriptions available from the [Chapter Playbook](https://leaders.naifa.org/chapter-playbook) and the Chapter Services Team.
   6. Formally communicate and request volunteering needs to all members on a regular basis. Utilize the tools provided in the [Chapter Playbook](https://leaders.naifa.org/chapter-playbook) and from the Chapter Services Team to assist with a call for nominations/volunteers.
   7. Announce candidates and leaders through all Chapter communication channels.
   8. Appreciate, recognize and celebrate the accomplishments of current and outgoing leaders.
2. **Identify Potential Leaders**
   1. Review, update and distribute position descriptions which clearly explain duties, time commitment and responsibilities.
   2. Analyze the Chapter membership to consider those who have volunteered, provided feedback, attended events, contributed to IFAPAC or showed any further engagement beyond just being an active member.
   3. Diversify the Chapter board with leaders from different disciplines, interests, talents or connections to various other groups and organizations.
3. **Interview, Select and Elect Candidates**
   1. Interview candidates to identify their interests, skills, goals and experience to understand how they may best serve the Chapter.
   2. Select candidates based on the results of those interviews and announce the slate of candidates to members.
   3. Elect candidates, preferably by electronic ballots, and report the results of these elections to the Chapter Services Team in a timely manner.
4. **Manage Transitions**
   1. Develop a leadership transition schedule to engage, inform and prepare the new leaders prior to the beginning of their term.
   2. Include an orientation training session to ensure that new leaders are aware of their governance responsibilities, as well as current issues of interest and focus for the chapter. Utilize the orientation tools available through the [Chapter Playbook](https://leaders.naifa.org/chapter-playbook) and the Chapter Services Team.
   3. Facilitate conversations between the leaders and those who are currently in the role that they will be assuming to make certain that they have the information and support necessary to be successful.
5. **Evaluate and Update**
   1. Consider conducting an annual 360 review of leaders to provide constructive feedback on how they can better engage, serve and get more out of their Chapter engagement.
   2. Evaluate the results of the succession planning process to determine what went well, what could be improved and how things should be done differently going forward.
   3. Update the succession planning process based on this evaluation process.

Collectively, these efforts will go a long way to build and facilitate a culture of developing and engaging members to become volunteer leaders. It is essential that it be thought of as a process and recognize that organizations should be perceived as healthy, fun and rewarding - not a burden or obligation. The organizations who achieve this are those that attract a wealth of volunteers.

**Succession Planning Chart**

|  |  |  |  |
| --- | --- | --- | --- |
| **Position** | **2025** | **2026** | **Potential Candidate(s)** |
| President |  |  |  |
| Immediate Past President |  |  |  |
| President-Elect |  |  |  |
| Secretary (or Secretary/Treasurer) |  |  |  |
| Treasurer (or Secretary/Treasurer) |  |  |  |
| Director 1 |  |  |  |
| Director 2 (if applicable) |  |  |  |
| Director 3 (if applicable) |  |  |  |
| Director 4 (if applicable) |  |  |  |
| Director 5 (if applicable) |  |  |  |
| Director 6 (if applicable) |  |  |  |
| Director 7 (if applicable) |  |  |  |
| Director 8 (if applicable) |  |  |  |
| Membership Chair |  |  |  |
| Advocacy Chair |  |  |  |
| IFAPAC Chair |  |  |  |
| Grassroots Chair (Federal) |  |  |  |
| Grassroots Chair (State) |  |  |  |
| Young Advisor Team (YAT) Chair |  |  |  |
| Diversity Advisor Team (DAT) Chair |  |  |  |
| Programs Chair |  |  |  |
| LILI Chair |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |
| Affiliate Chair - \_\_\_\_\_\_\_\_\_\_\_\_ Affiliate (if applicable) |  |  |  |