

The Full Cycle for Board Succession Strategic Recruitment – Thoughtful Engagement – Graceful Exit Some Action Items

Note: Please consult your organizational bylaws and practices before adopting any piece of this plan. This plan is modeled after a self-fulfilling board not an elected board model. Variations are required depending on the board election process.

Prepare

Plan for the organization to take this work seriously with adaptability

- Create a committee structure (implement/reboot/elevate)
- Use your organization's structure (bylaws, job descriptions)
- Draft and follow a plan (writing the plan)

Forecast the characteristics needed in new board members over the next 3-5 years

- Use your strategic plan, core values, diversity goals, and overall recruitment priorities
- Use a board matrix – specific to your organization – to identify the characteristics, backgrounds, styles, etc., and prepare an inventory of potential candidates
 - Define the annual use of this tool as one for stability/status quo, boundary spanner, or creative disruptor before putting it into action

Recruit

Nurture potential board members' interest in your organization

- Conduct strategic outreach
- Use committees, communications, etc.
- Provide board job description to articulate expectations

Place potential candidates to “stand” or “run” or “agree” to serve in board positions

- Follow the process outlined in your bylaws

Engage

Orient new board members by designing and conducting meaningful connections

- Serve as mentors for new members

Educate new board members by making the time to do it (good boards don't happen by accident)

- Work with the board chair or committee to design a board retreat (including the ED)
- Organize (with the ED) at least one training a year to help the board gain more knowledge about the organization's work

- Develop additional skill-building opportunities for the members to become a high-performing board
- Focus on adapting, shifting, and engaging to be a welcoming space

Assess and pick the right path for your team

- Design and conduct an annual board self-assessment
- Use executive sessions to check in as a team in a safe space
- Use a fast feedback form to assess trends for improvement

Graceful Exit

Transition and match the efforts to the person and your organization's culture

- Engage in planned succession (living terms and/or term limits)
- Live out a clear acknowledgment plan that matches organizational culture to thank people for their service (formal and/or informal)
- Say “thank you” in a culturally appropriate way – gifts of items, words, or actions
- Determine if there are special or additional ways to thank officers for their service
- Ensure a clear process to keep the “right” people engaged in the mission and on the mailing list

The Full Cycle of Board Succession

