

Developing a Succession Plan for Your Chapter Board

Chapter Webinar Series: June 18, 2015

© Association of Clinical Research Professionals



Today's Presenter



Lisa-Marie Gardner
Senior Membership Administrator,
Chapter Management

© Association of Clinical Research Professionals



2

Learning Objectives

After attending this webinar, chapter leaders should be able to:

- Develop an effective succession plan
- Describe the volunteer life cycle
- List the five (5) steps of a succession plan
 - Develop a plan to recruit future talent for chapter leadership positions
- Utilize ACRP tools and resources to assist with succession planning



What is Succession Planning?

Succession Planning is the use of a planned course of measure to ensure that volunteers are developed to successfully replace current volunteer leaders whenever needed to carry out the mission, vision and goals of the Chapter.



Succession Planning Should...

- Recruit new members
- Retain current members
- Develop skill sets

Expectations of a Volunteer

- Complete understanding of the position
- Feel welcomed
- Professional development/training
- Opportunity to do interesting work
- Feel appreciated
- Give back to the profession
- Learn something new

Obstacles to Good Succession Planning

- Competing obligations, time, resources
- Volunteer burnout – leaders wearing multiple hats
- Recycling of chapter leaders
- Strategic plan not in place to support proper succession planning

The Volunteer Life Cycle

Volunteer Life Cycle



Ensure you **HIRE** the best candidates for the position and give them what they need to be successful.

INSPIRE current leaders by setting goals, making them feel welcomed and providing them with leadership skills.

ADMIRE leaders by recognizing their achievements and letting them know they are appreciated.

RETIRE leaders and allow new blood on the board and longer chapter health.



Analyzing Your Board Roster

Position	Incumbent	COMPENTENCIES			Recommended Action
		Leadership	Initiative	Teamwork	
Chapter Chair	John Doe	Exceptional	Exceptional	Strong	Apply for a ACRP Board seat
Chair-Elect	Suzy Que	Strong	Strong	Strong	Chapter Chair
Treasurer	Jane Doe	Needs Improvement	Needs Improvement	Needs Improvement	End Term
Secretary	Mike Smith	Exceptional	Exceptional	Exceptional	Chair-Elect
Programs Chair	Lisa Lang	Strong	Strong	Strong	Continue in Position



Succession Grid

Position	Current Volunteer	2016 Projection	2017 Projection	2018 Projection
Chapter Chair				
Chair-Elect				
Treasurer				
Secretary				
Membership Chair				
Programs Chair				
Certification Chair				
Member-At-Large				

© Association of Clinical Research Professionals



Five (5) Steps of a Succession Plan

© Association of Clinical Research Professionals



STEP ONE: Preparation

- Invite members to join committees where they can be exposed to chapter operations, communications and strategies
- Invite committee members to attend board meetings to expose them to chapter governance and operations
- Include succession planning as a recurrent agenda item for discussion at board meetings
- Develop smaller “gateway” volunteer opportunities to continuously develop potential leaders
- Create and publish position descriptions for all open positions
- Formally communicate to chapter members about specific needs for volunteer leader for next year
- Announce candidates in chapter communications (newsletter, website, social media, etc.)
- Appreciate, recognize and celebrate accomplishments of current and outgoing leaders



STEP TWO: Identify Potential Leaders

- **Update position descriptions**
 - Ensure duties, time commitment and responsibilities are clearly outlined
- **Analyze the membership**
 - Consider those who have volunteered at chapter events or have taken initiatives and provided feedback and suggestions in the past
- **Seek diversity within your leadership**
 - Diversify your chapter board with leaders representing various organizations within the industry
 - Maintain balance between newcomers and tenured leaders



STEP THREE: Interview, Select and Elect Candidates

- **Interview** candidates to identify where their interests, skills and experience might best serve the chapter.
- **Select** candidates as a result of the interviews and announce the slate of candidates to the membership.
- **Elect candidate** by allowing chapter members to place their vote via paper or electronic ballot.



STEP FOUR: Manage Transitions

Address the following:

- *What is the leadership transition schedule?*
- *How long will the transition period (the time between the election of new leaders and appointment of office) last?*
- *Who will train and orient the new leaders?*
- *How will the training and orientation be conducted?*



Quick Tip: Onboarding & Orientation

Tips for planning the orientation:

- Hold a short session before a meeting for those interested in volunteering
- Have written goals for the orientation
- Provide a fact sheet on your chapter, including by contact list for various needs and questions
- Keep written materials simple and inexpensive



© Association of Clinical Research Professionals

STEP FIVE: Evaluate and Update

Evaluate the succession planning efforts.

- *What went well?*
- *What went wrong?*
- *What could have been done differently?*

Update your plan accordingly



© Association of Clinical Research Professionals

ACRP Tools & Resources



© Association of Clinical Research Professionals

ACRP Tools & Resources

- Call for Nominations
- Ballot Distribution & Collection
- Sample Position Descriptions
- ACRP Overview Presentation

ACRP Chapter Affiliates



ACRP North Texas Chapter Election Ballot

It is time to approve candidates for 2015-2016 Chapter Officer positions. Please make your selection or write in your nomination and click Submit. Ballots will be accepted through Friday, March 13.

Vice President/President Elect Candidate: *

Bridget Moty

Write-in Candidate

Secretary Candidate: *

Brooke Stephens

Write-in Candidate

Treasurer Candidate: *

Racella deGuzman

Write-in Candidate

© Association of Clinical Research Professionals



Questions?

Lisa-Marie Gardner
(703) 253-6276
Chapters@acrpnnet.org

