Best Practices: Network Leadership
Succession Planning & Transitions

When should transition take place?

- Networks are advised to set term limits in order to prevent volunteer leaders from burning out and to provide opportunities for new leaders to be involved in the network.
  - Two-year term limits appear to be most effective.
- The end of the calendar year (December 31) or the fiscal year (June 30) tend to be natural timeframes for leadership transitions.
- Preparation for leadership transitions should begin 4–6 months prior to the transition, with formal identification of the new leaders occurring approximately 2 months prior to the transition.

Recruiting Leadership Volunteers

- Put yourself out there! Work the room at events, introduce yourself to alumni, and discuss your involvement with the network.
- Encourage other volunteer leaders to do the same; be sure that all of your volunteers are aware that recruitment and succession planning are continual goals.
- Task current volunteer leaders with identifying and recruiting potential successors, as they know the role and its requirements better than anyone.
- Cultivate your active volunteers, ensuring that they have a positive experience and are gaining the experience and training that will be necessary if they’re going to take on a larger role.
- Leverage your staff partner’s knowledge to identify potential volunteers or volunteer leaders and consider having your staff partner meet with potential leaders during visits to your region.
- Identify alumni who are already strong volunteers: those who communicate effectively with the network leadership and CMU staff; have realistic expectations of themselves, other volunteers, and the network; and understand the network’s goals and mission.
- Remember that not every volunteer wants to be or has the capacity to be a volunteer leader! Recognize that some alumni are more comfortable assisting with events or serving in other, less visible capacities. Differentiate between these volunteers and volunteers with the capacity for and interest in leadership.
- Once alumni are engaged as volunteers, determine their motivation and goals; as you consider leadership positions for volunteers, consider these motivations and attempt to identify roles that will enable volunteer leaders to fulfill their own goals while also assisting the network.
- Identify your network goals and the positions and tasks that will be necessary to accomplish these goals, and match your leadership roles and volunteers to these goals.
- Be sure to develop roles that are focused on more than event planning in order to enable more alumni to engage and leverage their strengths.
- Encourage volunteers to engage by creating substantial roles that they can reference on their resume and from which they can benefit in the future.
- Make specific, one-on-one asks rather than putting out a general call for leadership volunteers.
- Ask volunteer leaders to fill specific roles and focus on specific tasks.
- Be clear about the time commitment that these leadership roles will require and make sure that the role is appropriate for the time that the volunteer is able to contribute.
Transitioning Volunteers into Leadership Positions

- Set attainable, measurable goals and communicate these goals to network volunteers in order to enable new leaders to continue to work toward common goals.
  - Consider creating an annual plan that can be shared with new leaders.
- Create a basic job description to assist in communicating the requirements of the new position to new and potential leaders.
- Have a clear and open discussion with your successor and your staff partner about the transition process, including timeline and individual responsibilities.
- Plan in advance and cultivate your successor.
  - For example, begin to CC your successor on network-related emails 2 – 3 months prior to the transition.
- Set a firm date on which the transition will take place.
- Involve your staff partner and network leader in communications regarding process, goals, and other important network initiatives so that they can help to bridge between leaders if the need arises.
- Communicate with other volunteers about the transition so that they're not lost during the leadership change.
- Consider sharing information about network leadership changes with the larger network in order to prevent confusion, highlight the fact that the network is volunteer-run, and encourage others to participate.
- Consider introducing a co-chair model to allow for transition or to provide support for volunteers who want to become more involved but are concerned about the time commitment.
- Consider creating emeritus or advisory roles for leaders who are transitioning out of their position and not taking on a new leadership position within the network. Doing so allows for continuity and can provide a sounding board and network history for new leaders.

Remember: there are multiple ways to achieve the same goal, and what has worked in other networks may not be appropriate for yours! Feel free to adapt best practices and other networks’ successes to meet your network’s goals.