



BOARD TRANSITIONS

Maintaining an effective board during a transition is the difference between continued success and your chapter dissolving.

BOARD MEMBERS LEAVE.

It's what you do before that makes the difference between a solid transition and a disruptive one.

Often you know about a transition in advance, like when:

- an entire board changes over at the end of a term
- board volunteers step down or move into new board roles with staggered board terms

Or sometimes, they're completely unexpected, for reasons you know nothing about, like when a board member moves or changes industries.

A transition plan is essential to continuing to meet and deliver on your mission and vision while you're down a key role, or the whole board at election time.

A lackluster transition derails more than just your board and leaves you with a void that lingers even after the new board member joins.

BOARD TRANSITIONS DON'T TYPICALLY GET THE ATTENTION THEY NEED.

Think about all that goes into delivering the value members want and expect from your chapter. Your board members do so much, including:

- determining the organization's strategic direction
- organizing events and meetings
- managing chapter marketing
- communicating to members
- bringing on new members

A transition plan is essential to continuing to meet and deliver on your mission and vision while you're down a person, or the whole board.

Now, think about the chaos that ensues when one leaves and takes critical information with them.

Let's say your VP of Technology steps down and you can't find any of your critical passwords. When that happens, everyone freezes, unable to make decisions and unsure what to do next; the website isn't being updated, email campaigns can't go out, or meeting registrations (and payments) can't be taken online.

Three months after they left, in addition to realizing you have zero idea what your VP of Technology was responsible for, you may find you:

- don't have a replacement
- have a replacement who isn't a good fit with the rest of the board
- have a replacement who isn't doing much because they have no idea what they are supposed to be doing

TRANSITIONS ARE FELT THROUGHOUT THE CHAPTER, EVEN IF YOU THINK THEY'RE NOT.

Even if you're trying your best to keep any transition-related problems from your general membership, they feel it, in the absence of benefits or the speed (or lack of) it takes to get things done. Board vacancies can mean backlogs and frustrations as you go into overdrive to get everything done – both your board members' regular responsibilities and those of the open role.

Your board should always be **recruiting, interviewing, and training** the next generation of board volunteers, to have qualified candidates ready to step into board roles long before you need them.

In the pages that follow are ideas for decreasing the time necessary to get new board members into roles, while increasing the success of those transitions.

RECRUIT. RECRUIT. RECRUIT.

Even if you don't need anyone yet.

When someone leaves the board, you may feel an urgency to bring someone, anyone, on board ASAP. This can lead to panic and shortcuts – like bringing on the first person you find. Or bringing on someone like the person who just left – even if they were never the right fit.

Looking for board members is a cycle with no beginning or end. Always be on the lookout, so you're ready for those expected and unexpected replacements.

“BUTT IN SEAT” NEVER WORKS.

An empty seat is better than having the wrong person in one. A bad fit can give you some uncomfortable board dynamics. A resentful, overwhelmed new board member who steps down can have a detrimental impact. They may even take some of the existing board members with them.

Taking the time to recruit the right person:

- increases the likelihood the person will be the right fit
- decreases the new board member's learning curve
- helps ensure the board continues to operate as it should and delivers the experiences members expect and deserve



HAVE BOARD JOB DESCRIPTIONS AND KEEP THEM UP-TO-DATE.

Without job descriptions, members have an unclear picture of what the board does, which could be preventing members from stepping into board roles. You could also find yourself with stressed, burned out board members disengaging midway through their terms because they weren't prepared for what they stepped into.

With the transparency that comes with job descriptions, you see:

- **Reduction in volunteer burnout.** When you include time commitments and detailed responsibilities, members know what's expected of them.
- **Improvement in board involvement and engagement.** Board members see how they relate to each other and fit into the chapter.
- **Stronger relationships between board members.** When board members understand the roles of other board members, there's less task overlap and "stepping on toes."
- **More clarity for evaluating performance and recognizing achievements.** With documented responsibilities, it's easier to see how board members perform against expectations and simpler to reward them for jobs well done.
- **Simpler board recruitment.** Job descriptions can help improve your volunteer numbers and retention, by setting expectations and engaging members early.

SUCCESSION PLANNING SHOULD BE PART OF YOUR JOB DESCRIPTIONS.

Have a succession planning process every board member follows to replace board members, including themselves. Identify members who consistently attend meetings and participate, and find ways to get them involved and interested in joining the board, like:

- **Matching potential and existing board members in mentorship roles.** Set up a shadow program for candidates to understand how the board and its members impact the chapter. Keep current board members engaged and motivated to train their successors.
- **Sharing the value of board membership.** Keep members aware of "what's in it for me." Show prospective volunteers how board volunteering helps them as professionals, including developing their leadership skills and building relationships with others in their industry.
- **Inviting them to board meetings.** Explain how meetings work and how board members shape chapter strategy. Talk about the board regularly, on your website and in your communications.



INTERVIEWING

lets everyone make better decisions.

You interview potential employees, so why not potential board members? Interviews increase the likelihood the new board member has the hard and soft skills, the fit, and the availability you need and provides a better sense of abilities and expectations...on both sides.

BETTER INFORMATION. BETTER BOARDS.

Interviewing a board candidate gives you better information, more details and insight than a resume, application, or what you gain from conversations with members who know the candidate.

Prepare questions that can't be answered with yes or no.

They say they're a team player? Get an example of a time they played a key role on a team. Ask them to share the good and the bad, to understand their reaction to challenging situations.

Just because someone tells you they're good with numbers or fundraising, or good at managing people, doesn't mean they really are; peel back the layers and ask questions that show they can do what they say they can.

Don't forget questions that demonstrate if and how the candidate shares your vision and passion for the chapter and helping it, and its members, succeed.

Introduce them to the entire board.

When you interview candidates for a job, they often meet those they'll be working with. Give board candidates the same opportunity, to ensure you won't be introducing a dynamic that will cause trouble in the long term.

CANDIDATES EXPLORE ALL ASPECTS OF A ROLE.

Your candidates need to do their own due diligence and learn what they'd be taking on, the easy and the interesting as well as the potentially frustrating and time-consuming.

If, after the interview, they agree to join, there is a stronger chance the person will feel they:

- made the right decision
- are getting out of the role what they expect
- won't feel like they've been "volunforced" into the position and took on more than they could handle
- can be free to share their views and experiences

DON'T BE AFRAID TO SAY NO.

If you wouldn't hire an employee who isn't right for a job or a team, why would you take that chance on a board "hire"? An interview gives you a clearer picture of a candidate's abilities, including their ability to fit into your board. If he or she isn't that person, don't ask them to join. You will find the right person.

But, don't let that person get away either. You don't want to lose the opportunity to get them involved and groomed for the next chapter election. The chapter should cater to their strengths. Channel their interests into something they may be better suited for, have them:

- shadow a current board member
- talk to a committee chair
- micro-volunteer to learn about different areas

WITH PROPER TRAINING,

new board members will do the job you need.



Without the proper support early on, new board members will never fully engage, with the job or your board.


Once they've said yes to the job, they may begin to feel a bit uneasy, as they may not completely understand:

- their role
- others' expectations of them
- their fit with the rest of the board


DON'T WASTE PRECIOUS TIME. TRAIN NEW BOARD MEMBERS BEFORE THEY START.

Keep the momentum and excitement going by starting your training as soon as they say yes. There are things you can do to get them up to speed and maintain their level of engagement, before and during the transition.

Start with introductions to current and/or previous board members. Ask that person to be available to answer questions and provide support and consider a "board only" get together as soon as possible, to give everyone a chance to get to know each other.



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Give them a sense of who and what they'll be working with.

Cover things like:

- **Administrative operations.**

Discuss the association and the chapter's vision and mission and how their position helps the board and the chapter succeed. Give them copies of meeting minutes, so they can see how the chapter and board meetings operate.

- **Overall role responsibilities.**

Provide the job description, even if they've already gotten it, along with your organizational structure, so they can see their role in context.

- **Systems they'll use.**

Review software and processes, including how to access them and who to contact for questions. Since your board needs to be highly cohesive, include those systems and processes the other board members use, such as your:

- website
- event registration
- email marketing
- membership management
- account system
- banking account access, if applicable

- **Available resources.**

Share vital information. Often, this information leaves with the transitioning board member(s), and a documented process can help avoid that loss. Share information regarding relevant contacts and processes for people and areas they may interact with once they start, such as:

- vendors, who work with/for the chapter
- past board members, to further explore how their role fits into the board and the chapter
- current marketing campaigns, to see board efforts in action
- your [Board Toolkit](#), to further ensure everyone has access to and understands the tools used to execute the chapter's daily functions

NEW BOARD MEMBER CHECKLIST

Review all aspects of their position:

- Administrative Operations
 - Overall Role Responsibilities
 - Systems They'll Use
 - Available Resources
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Encourage them do some homework.

Give them things to read—like marketing materials and articles written about the chapter and the parent association. Follow up to answer questions and ensure they've completed their assignments.

Hold a training for your whole board, new members and returning.

Training for the whole board is a good reminder for your board of best practices, while allowing the new member to interact with and learn from those already in their roles.

Cross-board training can also help you avoid a Single Point of Failure (SPoF) catastrophe. Remember that VP of Technology who left and took your passwords with them? That's your SPoF. Training the whole team together clarifies the responsibilities of the full board and diminishes the risk of knowledge loss with the loss of a board member.

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Single Point of Failure (SPoF) catastrophe.



YOU CAN KEEP YOUR

chapter operating smoothly during a transition.

Keeping your chapter on track while filling an open board role doesn't have to be stressful or overwhelming.

While you're simultaneously recruiting, interviewing, and training your next generation of board members, remember to:

Remain calm.

Acknowledge the discomfort early on and talk about your plans for managing things in the short- and long-term.

Get everyone on the same page.

Explain the downsides of not doing this person's work in their absence—unhappy members or loss of revenue—and that everyone may need to take on extra work during the transition. Remind the board why they joined and ask them not to let this temporary setback keep them from continuing to work toward meeting the chapter's mission and vision.

Create and prioritize a list of open tasks.

Are there things that can wait until the new person comes on board, like redesigning the logo or reviewing your mission and vision? Get agreement across the board on what must be done, what can wait, and the order it will all be accomplished.

Assign the "must do" responsibilities.

Perhaps the critical work can be done by the other board members, or perhaps you'll need to look for non-board volunteers or paid help. To shorten the learning curve, assign tasks to those with the skills to easily complete them.

With the crucial, open tasks covered, and the potential discomfort acknowledged, an absence will be easier to manage and less stressful for your board and ultimately your members.

LET STARCHAPTER

make your board transitions easier to manage.

StarChapter is a member-friendly association software company serving local chapters of professional and trade associations in the United States and Canada. Tell your board members you use StarChapter, and we'll be able to set up training for your board and your chapter needs. We will help them get comfortable with StarChapter, so you don't have to spend important volunteer time training new board members.

Our mission is to help local leaders grow their chapter's attendance, membership, and revenue. The software combines event registration, membership management, email marketing, mobile friendly website layouts, eCommerce, and web services, and board members have access to StarChapter Advisors, online support, 24/7 ticket administrators, phone support, and ongoing board training webinars. StarChapter continually provides resources to help local leaders succeed with chapter management insights.



Alone we can do so little, **together we can do so much!**

— *Helen Keller*