Where Do Our Future Leaders Come From?

Recruitment + Development = Impactful Succession Planning
What is Succession Planning?

- An initiative that enables chapters to grow and provided sustainable leadership
- Prepares your board for the process of identifying and developing talent to fill leadership roles
- Increases the availability of experienced professional leaders
- Creates a pipeline for future leadership

Purpose and Responsibility

- To ensure a chapter’s sustainability by continually grooming the next generation of chapter leaders.
- Succession planning is the specific responsibility of the chapter’s Nominating Committee and the collective responsibility of all chapter leaders including the Board of Governors.
Recruitment

If you don’t like what you see, volunteer!

Board Recruitment Challenges

Which Applies To Your Board?

• No organized recruitment process or strategy in place or followed
• Little to no board discussion and engagement about recruitment
• Board is not accountable
• President and/or small leadership group micromanages
• Too little or too much board/officer turnover
• Poor board relations
• Board doesn’t understand or know the chapter or organizations mission and vision
• No board training or orientation for new board members
Board Recruitment Planning Strategies

• Establish a Nominating Committee consisting of senior, well-respected board members such as current and past presidents and selected others who are well-positioned to source new candidates
• Engage in dialogue at the Nominating Committee and with prospective new board candidates throughout the year
• Ensure charter has provisions to periodically rotate off board members
• Consider diversity in recruiting and expand candidate pool by recruiting promising young professionals, government auditors, professors and selectively, service providers
• Know what you need and seek to add a targeted number of new board members EVERY year
• Source CAEs strategically when possible and use CAE and other Roundtable events to develop meaningful relationships with prospective candidates
• Seek to cultivate relationships with multiple potential candidates from targeted companies (create a candidate pipeline) to fill both board and committee roles
• Anticipate and plan for attrition by adding another officer position

Future Leader Recruitment Tactics

• Always recruit from a position of strength – it’s desirable and an honor to serve!
• NEVER revert to just a warm body to fill a position
• Invite prospects to attend your board meetings, let them experience the work done on behalf of the members
• Use creative marketing to prospective new leaders:
  ✓ Support their career goals and growth opportunities
  ✓ Build their company awareness through their involvement
  ✓ Provide mentoring opportunities for more junior people willing to get involved
  ✓ Send out an annual "Call for Volunteers"
  ✓ Start out small by asking for volunteers to take on small tasks or committee membership first and evolve to board membership later
Leadership Development

- Leaders don’t create followers, they create more leaders!

What do “GREAT” Boards Possess?

- They understand “What Matters Most” for the organization
  - Vision: Where you are going
  - Mission: Why you exist
  - Values: What guides you
- They are proud of who they are and what they provide
- They set clear expectations and are accountable to them
- They understand it is a serious commitment
What are the characteristics of Great Leaders?

- Vision
- Motivating Others
- Serving
- Acting with Humility
- Reliable
- Conviction of beliefs
- Perseverance
- Taking Action
- Selecting the Right People
- Passion for the profession

What it means to be a Great Leader?

A Balanced Board of Directors

Balance is not a given, we need to work for it.
IIA Board Leadership

- Governance as a Leader
- Everyone on the board
- should drive:
  - Fiduciary
  - Strategic
  - Generative

Leadership Development Best Practices

- Commit to sending the incoming President and another officer to the annual Leadership Conference and report out on IIA updates, best practices and resources
- Strongly encourage officers and committee chairs to participate in District Workshops
- Formalize transition planning and consider having an “all hands transition event”
- Engage the assistance of your District Representative in training the incoming President
- Encourage officers to pursue CIA and other IIA sponsored certifications
- Build out committee membership to create depth for future succession
- Create round table type programming to drive engagement and create opportunities for chapter members to plan events and lead discussions
- Solicit participation of CAE-level professionals to lead programming events targeting leadership development for manager/director level staff
Effective Practices for Board Service

- Length of Service – Understand and adhere to term limits as outlined by your bylaws
- Don’t continually rotate board members
- Length of service does not determine ability to be President
- Serving is not an entitlement
- Ask everyone to contribute

Board Sustainability

- See the future
- Engage And Develop Others
- Reinvent Continuously
- Value Results and Relationships
- Embody The Values