

MCS 310

Succession Planning



Time allotted	50 minutes
Teaching format	Instructor-led discussions with PowerPoint support, Activity.

Resources

Handouts	<ul style="list-style-type: none"> • MCS 310 – Unit Service Culture Statement – 1 per person • MCS 310 – Sample Volunteer Succession Plan Chart – 1 per person
Equipment and materials	<ul style="list-style-type: none"> • MCS 310 – Succession Planning course plan • MCS 310 – Succession Planning PowerPoint presentation • MCS 310 – Activity Cards – 1 per group • MCS 310 – Lists of Possible Unit Positions Activity – 1 per person • Computer and projector • Whiteboard or flipchart, appropriate markers, and eraser
Resources for additional participant learning	<ul style="list-style-type: none"> • Aaron on Scouting, Apr 1, 2017 https://blog.scoutingmagazine.org/2017/01/06/next-up-why-succession-planning-is-a-must-in-every-scouting-unit/

Course Connections

Connections to other CCS courses	
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Presentation Outline

Adult leadership changes. To support the orderly transition of leadership, it is essential to encourage each unit to develop a long-term succession plan. Commissioners need to understand the process to support the development and maintenance of a succession plan in the units they support.

Introduction and Course Objectives – 2 minutes

At the end of this training, a commissioner will be able to:

- **Explain** unit culture and succession planning
- **Understand** how to grow leaders in a scouting unit
- **Start and continue** the succession process

Unit Culture and Succession Planning – What is it? 5 minutes (slides 3-4)

How do we maintain the continuity of dedicated, trained leaders?

At some point, all adult scout leaders will leave their position. How do we maintain the continuity of dedicated, trained leaders?

Volunteers often serve time in a unit while their children are participating in the program. They may then volunteer in other unit positions or at a different level of the scouting program. Each unit needs to develop and maintain a succession plan to ensure the continued availability of leaders ready and prepared to step into unit positions.

Our statement about the culture of Unit Service reminds commissioners of the behaviors, beliefs, and values that enable them to achieve our mission and fulfill our vision.

Commissioners need to support the succession planning process. Throughout this presentation, ideas will be presented that focus on observations made during your visits and offer possible suggestions for conversations with a unit.

Understanding Unit Culture

Handout: Unit Service Culture Definition – 1 per person

For virtual presentation, consider whether to distribute the handouts (a) prior to the class, (b) during class on the chat line, if available, or email, (c) after the class, or (d) some combination of those.

Throughout the succession planning process, remember that units are like people. Each unit has its own unit culture and unique ways of conducting the program. As a commissioner, look for and be familiar with the procedures and distinctive traits of the units you serve.

A critical point in growing volunteers within a unit is integrating new parents into the unit. Also, each volunteer requires encouragement and support to assume leadership positions.

The commissioner needs to observe this interaction to support the unit in engaging its future leaders. As a commissioner, look for:

- Are parents welcomed, are questions answered, and ensured that they are fully integrated?
- Does the unit actively work to engage parents by introducing them to others and getting to know them before asking them to help with something?
- Does the unit look beyond parents - to the grandparents, older siblings, or other family members as sources for support?

The commissioner needs to understand the unit's practices in these areas and offer suggestions, when appropriate, so that all adults are given opportunities to match their interests.

Understanding Growing Unit Leadership - 10 minutes (slide 5)

Once parents have been welcomed and have experienced Scouting with their children, the time comes to consider engaging them in volunteering.

The commissioner establishes a relationship with the unit and should be familiar with their processes, making them better equipped to guide the unit. Again, purposeful observation will be essential to determine what suggestions are appropriate.

Suggestions might be that:

- Volunteers understand Scouting's goals and language as well as the program they are participating in.
- Prospective volunteers know that support is available, such as roundtable, and position-specific training.
- Another unit volunteer will accompany a prospective future leader to roundtable or other district/council training.
- Unit leadership is always available to answer questions and mentor individuals as new volunteers.

These suggestions will help units to actively grow their future leaders by preparing them to volunteer for tasks.

Additionally, parents and others may be more willing to volunteer by fostering a culture of mutual helpfulness. Mistakes will happen, and things may be done differently, but a volunteer is also learning a unit's culture and sharing possible new ways of doing tasks. Just like units grow Scouts, they need to attend to developing leaders carefully.

Understanding unit culture, as well as opportunities for support and training, increases the likelihood that a parent or unit member will step up to fill a leadership need, whether for a long-term or short-term role. Commissioners play an important role in supporting the unit to ensure that practices are in place to foster the growth of prospective volunteers/leaders.

How to Start and Continue the Succession Process – 25 minutes including 15-minute activity (slides 6-12)

Succession Planning Steps

Succession Planning involves multiple steps that need to be reviewed regularly. Discussing the unit's selection process with the unit Key 3 or the unit committee chair is a good starting point for creating a succession plan.

The steps are:

- Identifying all important positions in a Scouting unit
- Identifying current volunteers and their time served in unit positions
- Working with unit leadership to identify replacement candidates
- Updating the list of current volunteers and potential replacements

Each of the steps is important. The commissioner will coach a unit-designated group as they work through the succession planning steps.

Succession Planning Activity – 15 minutes

Groups of 3 or 4 are ideal. Ask the group to determine a recorder and reporter.

To prepare for Activity:

- **MCS 310 – Activity Cards – Print on a sheet of paper (cardstock), cut into 15 boxes, or by hand on 3x5 notecards. 1 set per group. Give each group 2 or 3 different cards.**
- **MCS 310 – Lists of Possible Unit Positions – print 1 per group (or per person)**

This activity initiates succession planning by creating essential lists.

- Create a list of the primary roles
- Create a list of ongoing support needed
- Create a list of short-term support needed
- Create a list of volunteer positions they would like to create or need

-Hand out a worksheet with categories and spaces to write in individual volunteer positions. Allow 5 minutes for each group to create their lists.

-As groups report, ask that they only share those that are different from the ones mentioned.

-Then hand out descriptions of those who could be candidates as unit volunteers. Have the group determine who the best candidates are for some of your positions. Allow another 5 minutes for discussion.

Allow time for sharing - ask open-ended questions such as:

- *How did the group make their decisions?*
- *Is there a perfect candidate?*
- *What can you do to support a candidate?*
- *Can the job be shared, and how would you share the responsibilities?*

As you wrap up the discussion, please note the activity responses you can use in the presentation on the following slides.

For virtual presentation, consider either of the following:

- Use breakout rooms for the buzz groups described above.
- Use the chat line feature, if the software supports it, for people to post their ideas.

Identification of Positions in a Unit

To begin, a unit needs to identify the jobs that are currently being done, as well as the ones that they wish they could find a volunteer to do, such as we did in the activity.

The primary roles are the unit leader, the committee chair, and the chartered organization representative. Many units also heavily depend on a volunteer serving as treasurer, advancement chair, new member coordinator, or activities coordinator. A unit's list will be unique to them.

For each of the primary roles, a job description is needed that outlines the tasks to be performed within the unit. The national job descriptions can be modified to meet a unit's individual needs and may be shared by more than one person. Be specific - listing time required, frequency, and preparation needed, as well as details of the tasks in these descriptions. Also, note the people skills required to perform the functions of the position.

There is always a need for ongoing support within a unit. Someone to monitor an activity, purchase supplies, create a flier, or perform many of the other smaller tasks that need to be done. Before asking, be sure to explain what is expected and ensure that the volunteer knows the name of the person they will be working with. Try to ask for their support in a timely manner so they have time to ask questions or discuss the matter with the leader they are assisting.

Short-term support - what is meant by this? This may include completing the tasks necessary for an event or camping trip. Again, sharing expectations, timeline, resources, as well as the name of someone to support their efforts. Establishing check-ins can be valuable for addressing questions and monitoring progress.

Every unit has things that are left undone or not attended to regularly. Create a list and keep it available so that if the ideal candidate appears in the unit, they are prepared.

Current Volunteers

Helping units understand that a change in leadership is a positive and necessary step for the unit's health. This is critical in this process. Each unit has very successful volunteers, but a commissioner needs to help the Key 3 understand the importance of planning for orderly and prepared leadership change. Without a period of transition, it is often a time of stress when a new leader steps into a position and needs to learn all its aspects.

A small group within the unit should be assigned to work on these tasks. Most likely, this group is the unit Key 3. Be careful about the confidentiality of information. The unit commissioner should not be a part of the group. They are a coach to the group, as needed.

First, the unit needs to create a list/table of the current volunteers and their time spent in a specific position. List all the key unit positions.

They (unit Key 3) should next schedule a time to have an honest conversation individually with volunteers who hold key positions. Ask if they are having fun. Listen for those who may need a break or a change in responsibility. Help the volunteers determine an end date for their service in this position and ask for their support in mentoring the next volunteer. Have a designated recorder for the answers. Be careful about the confidentiality of information.

Encourage the unit to consider having these conversations annually for essential positions to determine if priorities or an individual's circumstances have changed.

Future Volunteers

Next, the unit needs to create a list of volunteers who are candidates to take on responsibilities. Also note their personal skills, such as communication skills, the ability to delegate, a willingness to participate in training, the ability to plan, and other skills that the unit deems essential. Be sure to include those who have no responsibilities in the unit.

Maintaining these lists is crucial, as well as the unit continuing to mentor those who are potential key leaders in the unit.

The list, along with conversations with leaders in the unit, can help in the selection of prospective new unit leaders.

The unit may also need to be reminded about keeping the chartered organization representative informed of any prospective position changes.

Sample Volunteer Succession Plan Chart

Handout: MCS 310 – Sample Volunteer Succession Plan Chart – 1 per person

(Can be printed back-to-back, Scouts BSA and Cub Scouting)

The unit will need to create an organizer to gather information about its unit's volunteers. It can be part of the record kept from the individual conversations conducted with current leaders by the designated group. The cells can be modified to match unit needs. Try to record all the information that each volunteer shares.

Note: The unit does not select the COR, that is, the Charter Organization's responsibility. It is listed as it can be helpful to track their tenure, and the conversations should include the.

This chart or one created by the unit is for unit use only.

Continue Succession Plan

A succession process has been outlined. Now it is essential to put it into action with your units. The effectiveness will be impacted by the depth of the relationship that you have built with the unit.

- Find a time to talk. This may be during the Key 3 or unit committee meeting, or at a separate but convenient time for the unit. The entire process cannot be completed at this time, but it presents an opportunity to gather information that may be unfamiliar to you regarding how unit leaders are selected. Discuss key aspects of the process, including individual information about current volunteers and the conversations about their intentions. It would be essential to encourage the group to consider who will participate in the leadership discussions.
- Take the steps toward defining the positions critical to the unit, as well as others that will support the growth of future leaders.

- At this point, the commissioner needs to encourage the unit leadership to take the following steps. Determine who will conduct the discussions. (not the commissioner) Some aspects of this process might not be currently implemented in the unit. The process can be addressed during a unit connection. Use your knowledge of the unit to support the implementation of the succession process and enhance the unit's support for developing its future leaders.

Summary/Conclusion – 5 minutes

Today, we discussed a plan to establish a succession process for units.

- Explore unit culture and succession planning
- Understand how to grow leaders in a scouting unit
- Start and continue the succession process

You have notes on each of these steps, and now you need to begin to have those meaningful discussions with your units.

Remember, we support the heart of Scouting - ensuring our units and their leaders have the knowledge and support to deliver the Scouting program to their Scouts. We achieve this through learning and the relationships we build, because we understand the difference Scouting makes to individuals, as well as to the communities.

Questions? – 3 minutes