Deeper Dive: Succession Planning

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Quick Reference Guide

Please note: the HBA is no longer managing this process via succession worksheets. Please refer to the Succession Planning Process section below to familiarize yourself with the step-by-step process for this year.

Please refer to the HBA's Annual Planning Training (Succession Module) in the Leader Learning Center for more info.

What Is Succession Planning?

Succession planning is the annual process of identifying, preparing, and transitioning future leaders to ensure continuity and sustainability across HBA components. A strong succession planning process:

- Ensures smooth leadership transitions
- Preserves institutional knowledge
- Identifies and develops future leaders
- Strengthens team effectiveness and volunteer engagement
- Creates a better experience for leaders and members

Annual Timeline at a Glance

Timing	Activity
Year-Round	Identify and mentor potential successors
June-August	Review leadership rosters and determine upcoming vacancies
End of August	Complete leadership updates and open vacant roles
September	Promote and collect applications
October	Vet candidates and make appointments
November-December	Onboard, train, and transition incoming leaders

Key Deadline: *All upcoming vacant roles should be reviewed and opened for applications* ***by the end of August.***

Please refer to ***How to run a volunteer report*** *for guidance on where and how to pull your leadership roster and* ***Volunteer Management Module (Interim Solution)*** *for instructions on opening new roles and editing terms.*

Who Does What?

Volunteer Experience / Engagement Lead	Executive Committee	ALL LEADERS	HBA Central
• Process driver - leads the annual succession planning process • Reviews leadership rosters • Updates leadership records • Opens leadership roles • Coordinates timelines and communications	• Reviews leadership needs • Supports candidate evaluation • Makes final appointment decisions	• Identify potential successors • Mentor future leaders • Share institutional knowledge • Support onboarding and transition activities	• Provides systems, tools, and guidance • Supports recruitment campaigns • Maintains volunteer records • Delivers onboarding and training resources

Key Resources

Volunteer Management Module (Interim Solution)
Used to manage leadership terms and open roles for recruitment.

How to Run a Volunteer Report
Explains where to find and how to pull your current volunteer leadership roster via the HBA website.

Leadership Appointments & Terms Policy
Explains leadership term lengths, eligibility, and appointment requirements.

Volunteer Acknowledgement Policies
Outlines expectations and requirements for HBA volunteers.

Need Help? Contact volunteer@hbanet.org

Why Succession Planning Matters

As a volunteer-led organization, HBA relies on strong leaders to ensure continuity of programs, operations, and member experiences.

Without proactive succession planning, leadership vacancies can delay important work, create unnecessary burden on existing volunteers, and make transitions more difficult for incoming leaders.

Succession planning helps ensure that qualified, prepared leaders are ready to step into roles

when vacancies occur.

Key Policies to Know

Leadership Terms

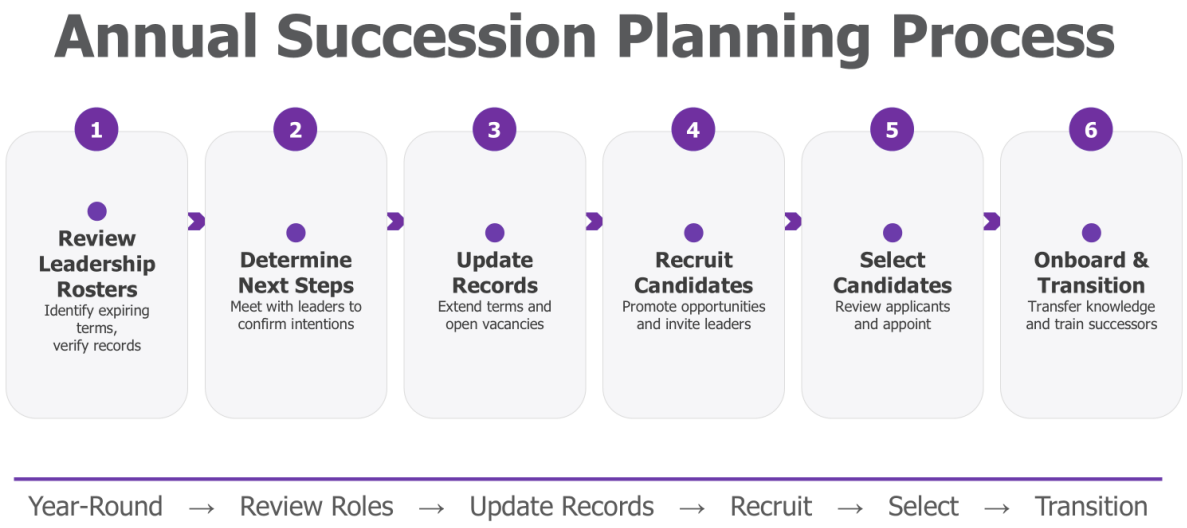
- Leadership terms are generally two years in length.
- Volunteers may serve a maximum of two consecutive terms in the same role.
- Leadership terms align to the calendar year.
- Terms end on December 31, with new appointments beginning January 1.

Membership Requirement

All HBA volunteers must maintain active HBA membership throughout their service.

When reviewing leadership rosters, leaders should also verify the membership status of volunteers whose terms are ending or continuing.

Succession Planning Process



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Step 1: Review Leadership Rosters

Begin by reviewing your current leadership roster.

During this review:

- Identify leaders whose terms end at the end of the current year

- Confirm leadership records are accurate
- Identify potential vacancies
- Review volunteer membership status

If a volunteer or role is missing from your roster, HBA may not have an official record of that appointment. Those records should be corrected before moving forward.

Step 2: Determine Next Steps

Connect with each leader whose term is ending and determine their plans.

Possible outcomes include:

- Staying for another term (if eligible)
- Moving into another leadership role
- Taking a break from leadership
- Rolling off entirely

The goal is to understand the status of every leadership role before opening applications.

Step 3: Update Leadership Records

Use the Volunteer Management Module to update leadership information.

If a leader is staying on:

- Extend their term by an additional two years

If a leader is rolling off:

- Confirm their term end date is accurate

If a role will be vacant:

- Open the role for applications

If a new role is needed:

- Submit and open the new role through the system

All leadership updates should be completed before the end of August.

Step 4: Recruit Candidates

Once roles are open, begin promoting leadership opportunities.

Effective recruitment strategies include:

- Sharing opportunities through component communications
- Promoting within personal and professional networks
- Personally encouraging qualified candidates to apply
- Highlighting leadership development opportunities

HBA Central will support recruitment efforts through broader organizational promotion.

Step 5: Vet and Select Candidates

During October, review applications and determine appointments.

This may include:

- Reviewing candidate qualifications
- Conducting interviews or conversations
- Evaluating leadership readiness
- Discussing candidates with Executive Committee members

Focus on selecting the candidate best prepared to succeed in the role—not simply the individual with the most tenure.

Step 6: Onboard and Transition

Once appointments are made, begin transition activities immediately.

New leaders should:

- Attend Leadership Institute
- Complete onboarding resources
- Shadow outgoing leaders
- Join planning discussions for the upcoming year

Outgoing leaders should:

- Transfer knowledge and documentation
- Introduce key contacts
- Provide guidance and support
- Help successors understand priorities and expectations

November and December are critical transition months that help ensure leaders are prepared to begin their terms successfully.

Best Practices

Start Early

Succession planning should happen throughout the year, not only when terms are ending.

Focus on Readiness

The best successor is not always the longest-serving volunteer. Consider skills, leadership potential, interest, and readiness.

Ask People Directly

Don't assume someone will volunteer on their own. Many successful HBA leaders became involved because someone personally invited them.

Document Your Work

Leave behind clear processes, timelines, contacts, and insights to help future leaders succeed.

Involve Successors Early

Include incoming leaders in planning discussions and transition activities before their term begins.

Verify Membership Status

Use annual succession planning as an opportunity to ensure all volunteers maintain active HBA membership.

Common Pitfalls to Avoid

- Waiting until the last minute
- Selecting leaders based solely on tenure
- Assuming someone is interested without asking
- Forgetting to update records in the Volunteer Management Module
- Failing to open roles on time
- Not documenting processes and responsibilities
- Providing little or no onboarding support

Final Thoughts

Succession planning is one of the most important investments a leadership team can make in its future success.

By intentionally identifying, developing, and supporting future leaders, components create stronger teams, smoother transitions, and a better volunteer experience for everyone involved.
