

Deeper Dive: Succession Planning

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PLEASE NOTE: All Annual Planning articles will be updated by end June 2026 for 2027 planning

High-level details for 2025 and key dates

- Succession worksheets are provided in early July
- Completed succession worksheets are due by **13 September**
- HBA Central will open all necessary roles for application by **30 September**
- HBA Central will send out a call for applications by the week of **7 October**, and additional promotional opportunities should continue through the month until the deadline for applications to be submitted (subject to adjustment as needed; the **application deadline will be pushed back automatically** until the open role is filled).
- Open roles can start to be promoted right away!

Who does what?

Succession planning is every HBA Leader's job! Volunteer/Engagement teams drive the process, but all components (Chapters, Regions/Regional Departments/Affinity Groups) must complete their succession plans.

HBA Central provides each component with its own succession planning worksheet for submitting roles to be opened. If you cannot locate your succession worksheet, contact volunteer@hbanet.org.

Succession Planning Guidance

The Importance of Succession Planning

As volunteer leaders, it is critical to identify and prepare a successor to ensure the continued success of your area and as a backup should you ever need to step back.

- Think about succession planning early.
- Develop a 'right hand' and re-evaluate throughout the year; make your successor your shadow.
- Share your wisdom and experience to prepare them better to take over when you move on.
- Allow your team to step up and explore their leadership skills.
- It aids retention and improves performance.
- You will be asked for your recommendations.
- Committee leaders - talent pool for future board spots.

Once your successor has been identified

- **Facilitate Handover:** Facilitate a structured handover process between the outgoing volunteer and their successor. This may involve meetings, training sessions, or job shadowing

to transfer knowledge, discuss ongoing projects, and address any questions or concerns.

- **Provide Ongoing Support:** Offer ongoing support and guidance to the new volunteer as they transition into their role.

And always remember, succession shouldn't always be a 'given.' Especially for the top-most levels of leadership, identifying the **right** leader to take things forward is paramount and shouldn't be based only on title levels. All volunteers must still apply and be vetted according to HBA's Leadership Appointments and Terms, but identifying the best successor and working to set up the line of succession makes the whole process easier.
