

# Area Team Succession Planning Framework

Teams may use this framework as a checklist in their succession planning process. Teams should assess where they fall in the process. Resources are available or can be developed to help teams navigate the process.

Succession Planning Process	Resources Available	Building Blocks Used
<p><b>Start with Leadership Meeting</b></p> <ul style="list-style-type: none"> <li>➤ Collaborate with AFS-USA staff to outline Succession planning points</li> <li>➤ Prioritize team needs</li> <li>➤ Ask vols in current roles to write their own job descriptions</li> <li>➤ Identify which jobs can be done by committee</li> <li>➤ Identify months where volunteers will need to be recruited most heavily</li> <li>➤ Identify &amp; invite CBO's to request volunteer recruitment</li> <li>➤ Identify host families/returnees to invite to do smaller roles</li> <li>➤ Develop Team Goals/Vision</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">SWOT Analysis</a></li> <li>• <b>Team Survey</b> - please contact your Organizational Development (OD) Specialist to start!</li> <li>• <a href="#">Gripe to Goal Worksheet</a></li> <li>• <b>Team Plan Template</b> - please contact your OD Specialist to start!</li> <li>• <a href="#">Team Organizational Chart</a></li> <li>• <i>*Vision Statement Writing Guide</i></li> </ul>	<p><b>Leadership Planning and Goal Setting</b></p>
<p><b>All Team Planning Meeting</b> (if working in a larger team)</p> <ul style="list-style-type: none"> <li>➤ Use volunteer newsletter/WP/FB to share date of meeting</li> <li>➤ Team leadership makes calls to all volunteers to invite to meeting</li> <li>➤ Prior to the planning meeting ask volunteers not currently fulfilling any roles to do Motivational Assessment or Volunteer Growth Plan</li> <li>➤ Use Motivational Assessment results to identify possible roles for new and seasoned volunteers</li> <li>➤ Communicate Leadership Vision and Goals/need for volunteers to fill vacancies for prioritized roles or committees</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Official Job Descriptions</a></li> <li>• <i>*Job Description Template</i></li> <li>• <a href="#">Team Calendar Template</a></li> <li>• <b>Team Directory from MyAFS</b></li> <li>• <b>Volunteer Motivational Assessment</b></li> </ul>	<p><b>Communication Roles and Responsibilities Climate</b></p>

<ul style="list-style-type: none"> <li>➤ Provide list of volunteer opportunities for the upcoming cycle.</li> <li>➤ Provide sign-up sheets for vols to commit to task-based opportunities and/or volunteer roles.</li> </ul>	<p>- please contact your Organizational Development (OD) Specialist to start!</p> <ul style="list-style-type: none"> <li>• <a href="#">Volunteer Growth Plan</a></li> </ul>	
<p><b>Create Transition Plan</b></p> <ul style="list-style-type: none"> <li>➤ Team leadership develops a mentoring program and timeline for transition</li> <li>➤ Set up frequent check-ins during the transition period</li> <li>➤ Meet with incoming and outgoing volunteers to develop a communication plan and transfer of information and resources</li> <li>➤ Provide appropriate trainings for volunteers in new roles</li> <li>➤ Communicate frequently with volunteers during the transition period</li> </ul>	<ul style="list-style-type: none"> <li>• <i>*Mentoring Plan Template</i></li> <li>• <a href="#">AFS Training Links from Help and Learning</a></li> <li>• <i>*Communication Tree/Team Leadership Tree Template</i></li> <li>• <i>*Template for Team Newsletter (<a href="#">sample newsletter</a>)</i></li> </ul>	<p><b>Communication Leadership</b></p>
<p><b>Celebration and Recognition of Outgoing and Incoming Volunteers</b></p> <ul style="list-style-type: none"> <li>➤ At the end of the transition period, plan year end wrap-up and planning meeting</li> <li>➤ Review Team Plan and celebrate annual goals met (beyond hosting and sending numbers)</li> <li>➤ Create an event to recognize the contributions of outgoing volunteers and potential of incoming volunteers.</li> <li>➤ Continue to provide enrichment opportunities by communicating about webinars, trainings, and possible conferences.</li> </ul>	<ul style="list-style-type: none"> <li>• <i>*Invitations for Events</i></li> <li>• <a href="#">Access to Webinars and trainings via Help and Learning</a></li> <li>• <i>*List of ways to recognize volunteers</i></li> </ul>	<p><b>Climate</b></p>
<p><b>Maintain Vision and Goals</b></p>	<ul style="list-style-type: none"> <li>• <b>Team Meeting Calendar</b></li> </ul>	<p><b>Leadership Roles and Responsibilities</b></p>

<ul style="list-style-type: none"> <li>➤ Check-in on goals with quarterly team leadership meetings</li> <li>➤ Celebrate meeting goals or priorities at each team meeting and in newsletters</li> <li>➤ Regroup when necessary and before issues get out of hand</li> <li>➤ Provide safe forum for feedback from volunteers</li> <li>➤ Invite host families to participate in all social activities and team meetings</li> <li>➤ Continually seek recruitment opportunities to engage new volunteers</li> <li>➤ Use AFS staff as a resource for stronger teams resources</li> </ul>	<ul style="list-style-type: none"> <li>• <i>*Communication Tree</i></li> <li>• <i>*<a href="#">Volunteer Feedback form</a></i></li> <li>• <b>Gripe to Goal Worksheet</b></li> <li>• <a href="#">Team Meeting Agenda</a></li> </ul>	<p><b>Communication Planning and Goal Setting Climate</b></p>
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## Things to Consider:

- Consider what roles need to be developed? -Volunteer Coordinator/Communication Coordinator/Community Outreach Coordinator, etc.
- Consider which roles could be better utilized when organized in committees - Support Coordinator/Liaison Coordinators/Social Event Coordinator, etc.
- Consider creating Executive Team that will oversee succession and volunteer transitions.
- How can staff help to facilitate meetings and/or provide resources?

*\*Indicates work in-progress. Please contact your Organizational Development Specialist for more info.*