

Succession Management Plan for ASME Unit Leadership

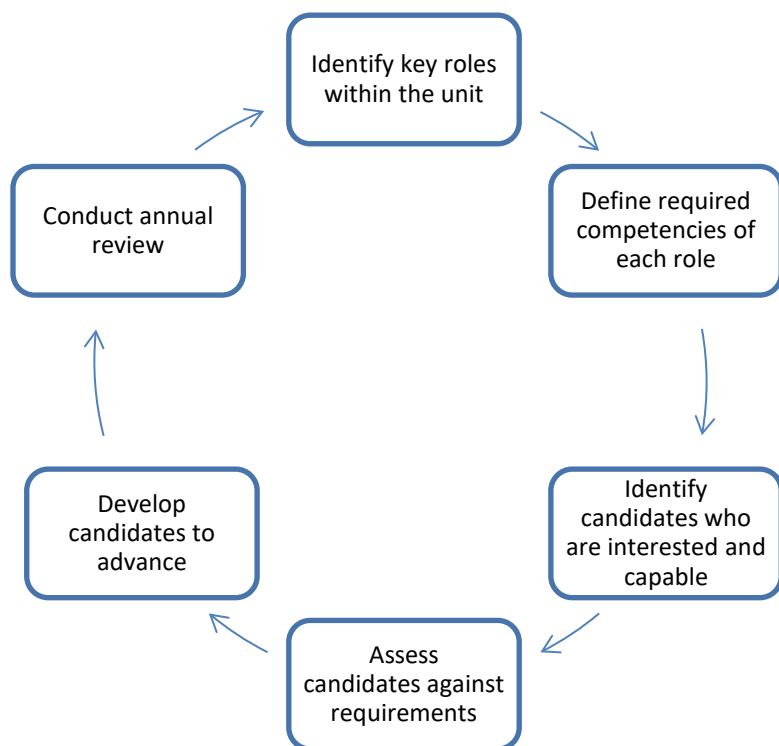
Continuity of volunteer unit leadership is critically important to the ASME's ability to deliver on its mission and vision. A clearly defined succession management plan will ensure alignment between the unit's future needs and the aspirations of individual volunteers. This alignment will in turn lead to continuity of leadership for the unit by providing a continual process to develop a range of promising candidates on an ongoing basis.

Objectives

- 1) Provide a streamlined succession management plan to ensure leadership continuity over time
- 2) Improve identification of volunteers with the potential to lead
- 3) Determine and source necessary training and development opportunities to prepare future leaders

Succession Planning Process

Succession planning is an ongoing process that can be broken down into six key steps, as pictured in the chart below. Details of each step are described below.



STEP 1: Identify Key Roles Within the Unit

This plan provides a succession management process for the top unit leadership positions, such as Chair, Vice Chair, etc.

STEP 2: Define Required Competencies for Each Leadership Role

Each leadership role should have a position description outlining key competencies for that position. VOLT has identified competencies in five key areas:

1. Experience
2. Proven responsibility
3. Temperament and character
4. Understanding of ASME culture and processes
5. Willingness and availability

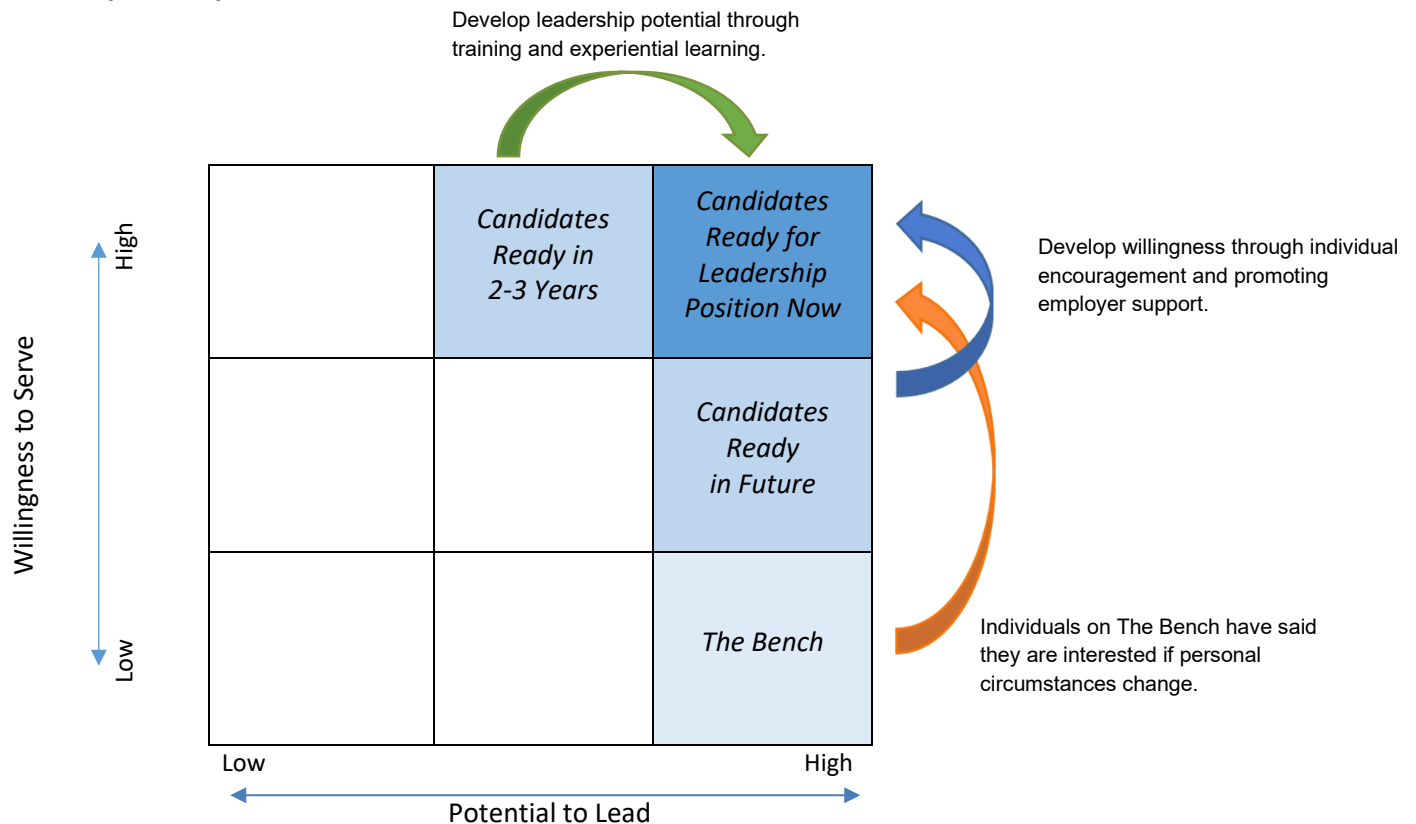
In addition to these, there may be additional competencies required for certain positions depending on the unit.

STEP 3: Identify Candidates Who Are Interested and Capable

Current volunteer leadership should conduct informal interviews of current volunteers and unit members to gauge their interest, current capability for a leadership position, and their expectations for employer support. While it's important to understand the key competencies for the role, be sure to consider that meeting these requirements may look different for different candidates.

- Talk to all current volunteers serving in the unit. There may be potential leaders on the team that leadership has not considered.
- Interested and capable Individuals should be assessed for their willingness and ability to find the time required. Be realistic about the commitment.
- Candidates who have the capability but cannot commit due to personal circumstances can be considered to be on *The Bench* (see matrix on next page). Their circumstances may change in the future, so be sure to keep them engaged at a level that works with their availability.

Leadership Development Matrix:



STEP 4: Assess Candidates Against Requirements

Current volunteer leadership should assess candidates against the requirements for all leadership positions. Keep an open mind – not all future leaders will come with the same background.

- Those who possess high willingness to serve and high ability to lead should be considered as *Candidates Ready for Leadership Position Now*. Talk with these individuals about being your immediate successors.
- Individuals who possess high willingness and demonstrate leadership potential should be considered *Candidates Ready in 2-3 Years*. These individuals should be developed to build their capabilities.
- Individuals who possess moderate willingness but high potential to lead should be considered *Candidates Ready in Future*.
- It is recommended that there be two identified candidates in each of the above categories at all times.

STEP 5: Develop Candidates To Advance

Create growth opportunities for candidates to gain leadership skills and experience in the key competencies for the role where they may be lacking. Be deliberate in developing potential leaders from a range of backgrounds.

Development for *Candidates Ready in 2-3 Years*

- Candidates should work with a mentor and/or shadow current leaders
- Identify general leadership development and unit-specific development opportunities

Development for *Candidates Ready in Future*

- Offer scaled-back or micro-volunteering opportunities
- Reach out to employers to offer praise and make the case for support of ASME involvement

STEP 6: Conduct Annual Review

The unit leadership should conduct an annual review of previously identified candidates. The progress made by *Candidates Ready in 2-3 Years* and *Candidates Ready in Future* should be a particular focus of the annual review.