Successful Tools for Leadership Succession

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SESSION OBJECTIVES

• WHY is leadership succession important?
• WHO does this apply to?
• WHEN does this happen?
• HOW do we do this?
FIRST IMPRESSIONS

• What image are you portraying to the community?
• What do you want your image to be?
• Reputation
• What you think vs. how you are perceived
• You only have one chance to make a first impression
• Snap judgements
PUT YOUR BEST FOOT FORWARD

- Be an Optimist
- Be an ambassador for UCLA - positive, inviting
The Board Building Cycle

Identify

Cultivate

Recruit

Educate

Evaluate

Rotate

Celebrate
IDENTIFY

• What are your board’s needs: skills, knowledge, network constituency
• Where to find prospective members
• How to recruit new members
• Broadly: cast net
• Specifically: identified needs
• One-on-one: develop relationships, discover interests and availability
• Get them interested, keep them informed, ask them for help
• Everyone on the board needs to participate
RECRUIT

• Know what roles you are looking to fill
• Describe expectations and responsibilities
• Don’t minimize requirements, but keep it fun
EDUCATE • Engagement equals Retention

- Review programs, bylaws, strategic plan, accomplishments
- Introduce to the board
- Assign “buddy”
- Involve in committee or task force
- Take advantage of people’s talents
- Remember, we’re all Bruins!
EVALUATE

• Engage the board in assessing its own performance
• Check in on new members
• Identify ways to improve and enhance roles or the group
• Why have you stayed? Why are you here?
• Exit interviews: Why are you leaving? How do you feel?
• Have a succession plan
• Establish term limits
• Do not automatically re-elect; consider the board’s needs and the member’s performance
• Explore advisability of resigning members who are not active
• Beware of Greek choruses
• Recognize you must leave the past behind to move forward
CELEBRATE

• Recognize victories and progress – even the small ones
• Appreciate individual contribution to the board, the organization and the community
• Make room for humor and a good laugh
• Consider inviting past leaders to celebrate achievements
Questions?

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