

WEFMAX 2012

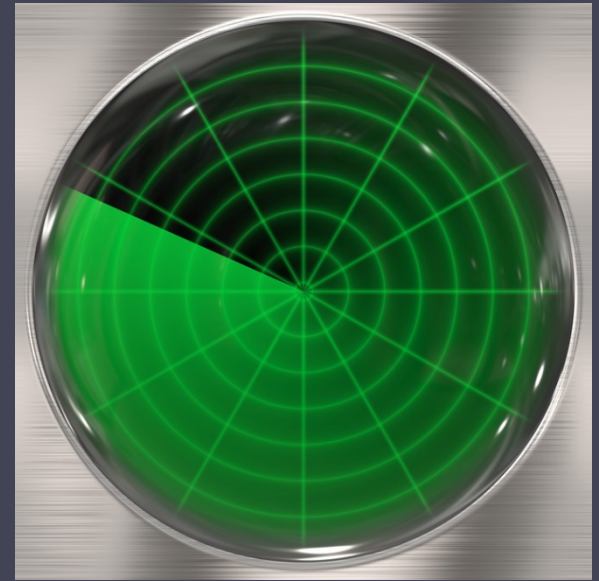
North Carolina WEA
Succession Planning and Volunteer Training

Why A New Strategic Planning Model Is Needed

- Immediate and ongoing, complex and compounding array of change
- Create capacity to deal with new programs
- Balance human/financial resources
- Tie directly to the annual budget process
- Recruit/select the right person for the right job
- Offer meaningful training for volunteers & staff
- Measure success
- Make organizations sustainable

2. SONAR

A process of locating unseen objects underwater by reflected vibrations that return images to guide safe movement.

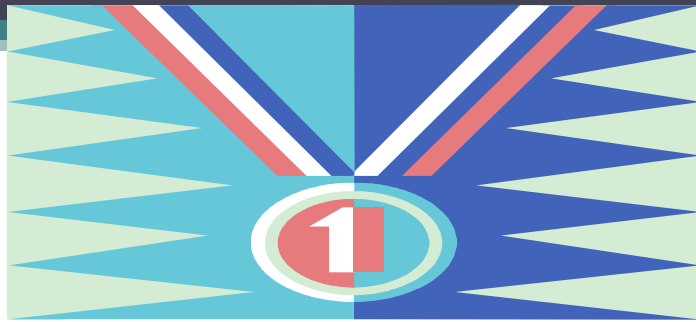


- ↻ Sustainable
- ↻ Outstanding
- ↻ Nimble
- ↻ Anticipatory
- ↻ Responsive

SUCCESSION PLANNING: FUTURE FOCUS & EXCELLENCE



- Revise Governance Structure -
7 Measures of Success
- Enhance Communication
- Focus Recruitment - Right Person, Right Job
- Build "Play Books"
- More and better training
- Liaison role
- Accountability



Becoming Remarkable

- Board role emphasizes future planning to lead and manage change
- Alignment of products/services with Mission
- Data-driven decisions
- Allocation of human/financial resources to priorities
- Customer Service Culture
- Dialogue and Engagement - keeping an internal conversation going between volunteers and staff about direction and priorities

= Sustainable, Outstanding, Nimble, Anticipatory, Responsive

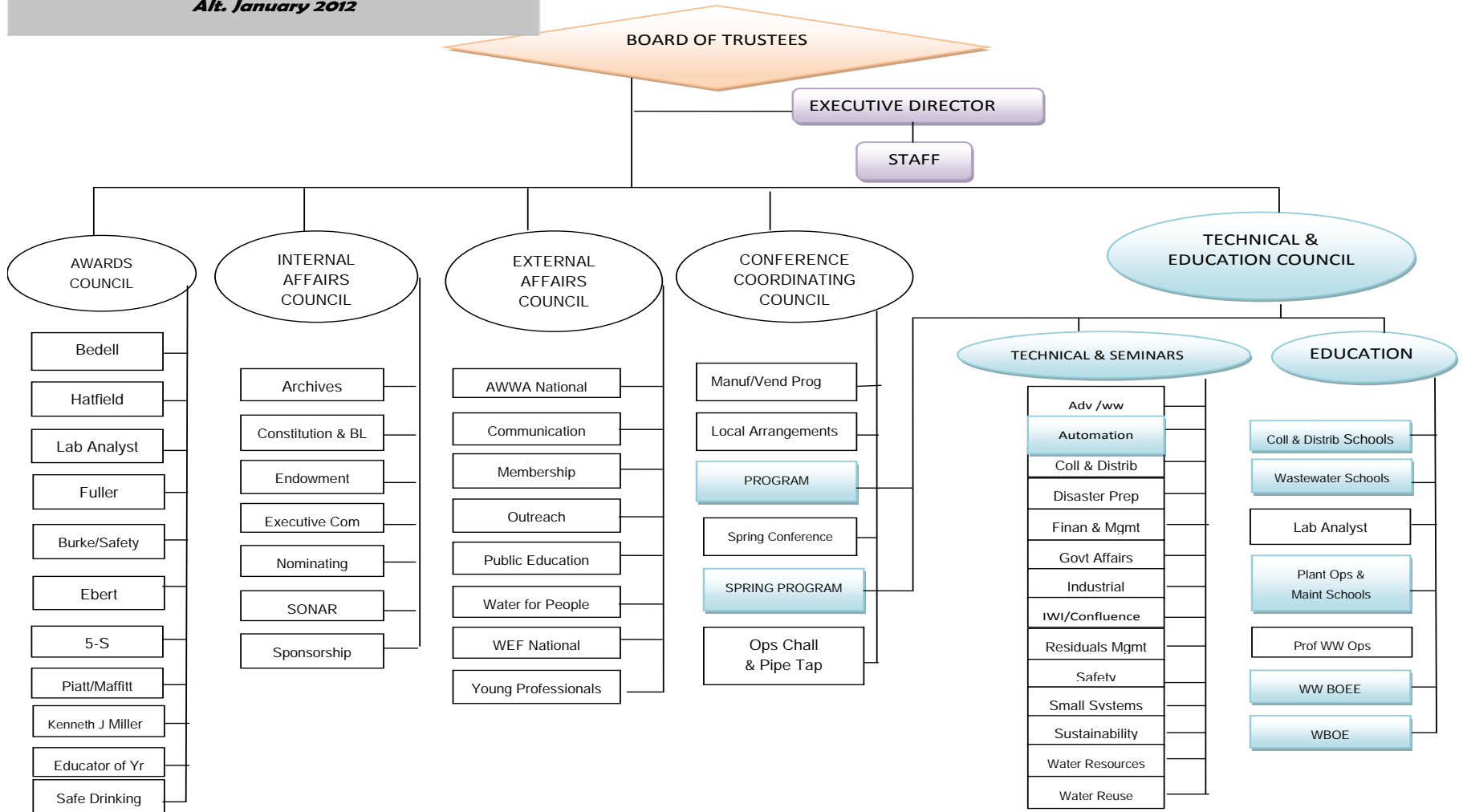


TOOLS TO ENHANCE COMMUNICATION

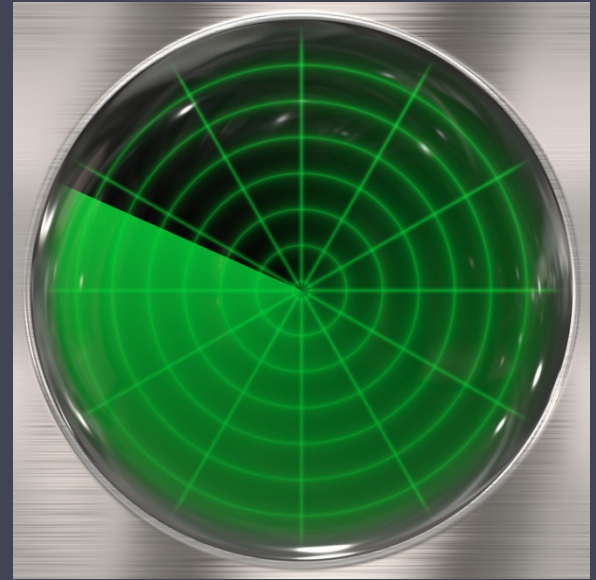
- Use of teleconferencing
 - Toll free dial-in teleconferences
- Web conferences, using Skype
- Establishment of Councils
 - Enhances coordination between Committees
 - Leverages human and financial resources
- Liaisons
 - Streamlines communication
 - Single point-of-contact for Committees and staff

COUNCIL STRUCTURE

NEW ORGANIZATION CHART – COUNCIL FORMAT
Alt. January 2012



3. ACCOUNTABILITY



Tasks

Expectations

Deliverables

TASKS

- Work Plans and Budgets
- “Play Books” - Roles and Responsibilities
- Coordination and Prioritization of all Committee-work Within Councils
- Succession Planning: Vice Chairs
- Timelines and Deadlines

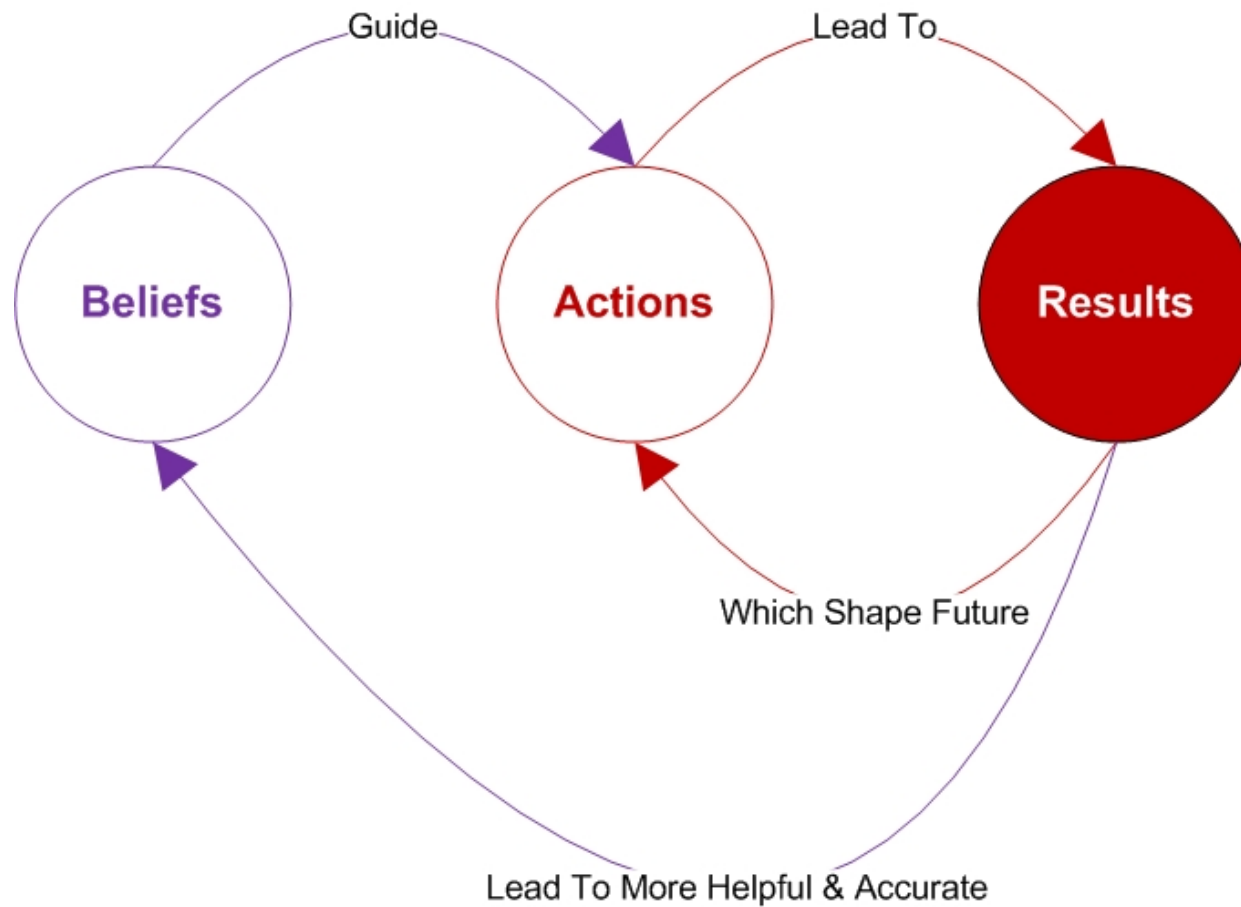
EXPECTATIONS

- Volunteers and Staff
 - Continuing to be a volunteer-led organization requires the volunteers take responsibility
 - Committee Chairs expected to find assignments for each Committee members to help complete Committee Work Plans
 - Accountability and follow-through are vital
 - Volunteers are expected to take and keep meeting notes
 - Board establishes the focus for staff and there's limited time for work that's not Mission-critical

DELIVERABLES

- Work Plan
- Budget
- “Play Book”
- Future leaders
- Mission-critical tasks completed by deadlines
- Communication - meeting notes

"Do-Loops"



QUESTIONS?



ANSWERS!

