

Ten Steps for Establishing a Succession Plan Addressing Volunteer Disengagement

Abstract

What happens when volunteers disengage from an Extension program? What steps should Extension professionals take to fill a vacated role? There is a robust amount of research regarding best retention practices once volunteers are plugged into a program. However, there is a gap in current volunteer literature regarding practical applications to prepare existing volunteers to take on new roles. Incorporating proven strategies through practical applications would allow Extension professionals to address volunteer disengagement before it happens. Extension professionals can consider 10 steps to develop a succession plan to address volunteer disengagement.

Keywords: [succession plan](#), [volunteers](#), [sustainability](#)

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Recruiting volunteers to perform educational outreach is an established Extension tradition that sustains clientele reach. The large number of volunteers engaged in Extension programming across the country indicates that Extension professionals are effectively recruiting volunteers (Culp et al., 2007; Gagnon et al., 2015; Lockett & Boyd, 2012; Washburn, 2017). The Expanded Food and Nutrition Education Program (EFNEP) was delivered by 19,467 adult volunteers in communities across the country in 2017 (EFNEP, 2017). According to the National 4-H Council, over 500,000 volunteers led 4-H programs in 2019 (National 4-H Council, n.d.). In 2018, 86,076 master gardener volunteers facilitated educational programs (Extension Master Gardener, 2019; Langellotto et al., 2015).

There is a robust amount of research regarding best retention practices once volunteers are plugged into a program (Culp, 2012, 2013; Strauss & Rager, 2017). However, the assumption that Extension programs can retain a volunteer forever is unrealistic. Volunteers disengage from programs, affecting sustainability and clientele reach of Extension education (Rothwell, 2016; Washburn, 2017). Often volunteer managers invest so much time training existing volunteer leaders that other volunteers with potential to transition into leadership roles do not receive enough training until a role is vacated. There is a gap in current volunteer literature regarding strategies practitioners can use to prepare existing volunteers to take on new leadership roles

within an Extension program.

Incorporating proven strategies through practical applications would allow Extension professionals to address program interruption caused by volunteer disengagement before it happens. If transitions among volunteer leaders are planned, the likelihood of disruption of educational programming is decreased (Rothwell, 2016). Extension professionals could use succession planning research as a guide for increasing sustainability of a volunteer-led Extension education program once volunteers disengage.

Definition and Benefits of Succession Planning

Succession planning is defined as a standardized process an organization implements to fill vacated leadership roles with individuals who are prepared, reducing operational interruptions for continued sustainability (Parfitt, 2017). The need for succession planning assumes that leaders are not permanent fixtures and that eventually they depart or retire from their positions (Klein & Salk, 2013). Establishment of buy-in, leadership training and development opportunities, transparency, talent identification, clearly communicated messaging, and evaluation are all vital procedures included in a succession plan (Barton, 2019; Campion & Bond, 2018; Froelich et al., 2011; Parfitt, 2017; Pedersen et al., 2018; Richards, 2009; Rothwell, 2016; Russell & Sabina, 2014).

When organizations establish a succession plan, they are intentionally forecasting change (Day, 2007). The use of succession planning is beneficial, as research has suggested that the threat to sustainability is decreased as change has been anticipated and organizations are prepared for such changes (Culp, 2013; Rothwell, 2016).

Limitations of Succession Planning Research

Although research has been conducted on the benefits of using succession planning with salaried employees in business, nursing, teaching, and higher education fields (Barton, 2019; Day, 2007; Rothwell, 2016), there is a notable gap in research with volunteers.

Applications for Extension Professionals

Although gaps exist in the volunteer literature and succession planning literature relative to succession planning for volunteer roles, Extension professionals can leverage pertinent findings from the succession planning research to inform practical applications for addressing volunteer disengagement. Table 1 outlines 10 research-based steps for establishing a succession plan with a volunteer group.

Table 1.
Steps for Establishing a Volunteer Succession Plan

Step	Description
Step 1: Write it down.	As organizations adopt volunteer succession plan practices, the design must be written down. The goal of the succession planning drafting process is to write a complete plan that provides steps to follow, transparency, and clear messages (Rothwell, 2016). Record keeping is key while drafting a succession plan.

- Step 2: Create positive messaging. Adopting succession plans within volunteer groups may create negative feelings if the concept is misunderstood (Richards, 2009). As succession plans are drafted, clearly communicating their purpose to volunteers is vital. Messaging should focus on the need for shared workloads, stress reduction, and program sustainability and preparation (Barton, 2019; Froelich et al., 2011; Richards, 2009; Rothwell, 2016).
- Step 3: Involve others. Current volunteers should be involved in the drafting of the plan (Froelich et al., 2011). Including volunteers helps ensure that the organizational culture is ingrained in the plan (Barton, 2019; Campion & Bond, 2018; Pedersen et al., 2018; Richards, 2009; Rothwell, 2016). Also, by involving volunteers, the propensity for buy-in from the volunteer group increases (Richards, 2009).
- Step 4: Develop around culture. A volunteer group's succession plan should reinforce the group's organizational culture (Rothwell, 2016; Russell & Sabina, 2014). Organizational culture includes the group's missions, ethics, goals, values, norms, competencies, and strategic plans (Parfitt, 2017; Richards, 2009; Rothwell, 2016; Russell & Sabina, 2014). Succession procedures should align with the values, principles, and policies of the Extension program (Richards, 2009).
- Step 5: Identify priority needs. It is important to prioritize volunteer roles that would cause the greatest interruption in program delivery if vacated. Succession plan drafts should be focused around the procedures that would need to occur to fill the priority role with a volunteer already engaged in the program, thereby creating a seamless transition (Barton, 2019; Campion & Bond, 2018; Culp, 2012; Rothwell, 2016; Strauss & Rager, 2017).
- Step 6: Consider future needs. Priority needs are important to consider; however, considering future needs is beneficial as well. A key is to look forward to future volunteer needs of the program. Succession planning helps train future leaders within a volunteer program, even for roles that may not currently exist (Richards, 2009).
- Step 7: Select volunteers. Succession planning is designed to target future leaders (Richards, 2009). As a succession plan is drafted, the procedures for which volunteers will be selected to take part in the succession plan must be clear and transparent. One transparent strategy to include in a succession plan is selecting volunteers on the basis of self-reported leadership aspirations expressed through evaluations or interviews (Pedersen et al., 2018). Assessing aspirations will facilitate choosing volunteers to participate in the plan as well as allow for individualized training and development for volunteers (Culp, 2012, 2013; Strauss & Rager, 2017).

Step 8: Conduct training.	A succession plan must include leadership training and development opportunities, beyond established orientation and program-specific trainings (Barton, 2019; Pedersen et al., 2018). Existing volunteers and Extension professionals should deliver leadership training related to the succession plan (Froelich et al., 2011). It is important to rethink traditional leadership development curricular training methods (Russell & Sabina, 2014). One should consider new role-embedded training approaches for volunteers, including virtual space dialogues, lesson studies, role shadowing, internships, role rotations, and special assignments (Barton, 2019; Froelich et al., 2011; Pedersen et al., 2018; Rothwell, 2016; Russell & Sabina, 2014; Smith, 2008).
Step 9: Introduce the plan.	Once a volunteer succession plan is finalized and ready to be executed, the next step is introducing the procedures through a carefully crafted message to all volunteers (Richards, 2009). Communication should be encouraged throughout the execution of the plan (Campion & Bond, 2018).
Step 10: Evaluate the plan.	Succession planning processes and strategies should be continuously evaluated for effectiveness in developing prepared volunteer leaders (Froelich et al., 2011; Richards, 2009; Rothwell, 2016). Evaluations should be continuous and include the appraisal of individual volunteers participating in the plan, the plan itself, and those involved in each step of the succession plan process (Richards, 2009). As problems are identified, volunteer leaders and Extension professionals can work to improve the plan by implementing improved strategies (Froelich et al., 2011).

Conclusion

Succession planning is a great forecasting tool Extension professionals can use to ensure that programs are continued when a volunteer disengages. It is important to keep in mind that succession planning is training volunteers for future roles. Future volunteer leaders may not have a role to transition into for some time, ensuring that there is adequate time for implementing quality leadership and development training.

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