

**July 20, 2004**  
**North Pacific District Leadership Teleconference**  
***Succession Planning in Your Chapter's Leadership for 2005-***  
***The Future is Now***

**DISCUSSION SUMMARY - 3 PAGES**

Speakers:

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Moderator: Dianne Danowski Smith APR, Chair, PRSA North Pacific District

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**A. Theme:**

*Turning crisis into opportunity - effective succession strategy.*

**B. Four key recommendations to consider during succession planning**

1. *Conduct a chapter strategy meeting with your current and future chapter leadership three months before you begin your next year.*

- Set your goals and objectives for the year, ensuring that you line up with the goals and objectives of national for that year. Then: tailor to your specific chapter needs. If you don't know what national's objectives are and what your chapter's needs are, find out and then do it.

- Key: value those who dissent, embrace their feedback, but stick to chapter goals and objectives.

- Realize that your plan will not go according to plan. OK. Be willing to step back and punt, if you cannot get a touchdown. A well thought out punt that succeeds is probably better than a touchdown that totally fails. Failure is OK. Get after it and work at it until the chapter succeeds. Never, ever give in. This may take months, even years.

- Key: quick wins are fine, but make decisions with the long term in mind. Be willing to look at a smarter way of punting. Accepting someone's key recommendation which

is a better way to solve a problem will probably encourage them to stay with the chapter and aspire to leadership. We have chapter members who conceive better ideas than any of mine every day.

- Revisit your strategy mid year. Where are we doing well? Where are we failing? Why? Then take action to correct. Be honest. This does not necessarily mean removing someone who may not be performing - try a co-chair solution first. My theme: You're hired!

- Bottom line: by setting a strategy for your leadership and following through - especially when the going gets tough - you will have a basis for your people to work off of, helping to keep your board intact and more effective throughout the year.

*2. From the very beginning of your term, include members of all levels of experience in your planning and activities.*

- Seek out members who will put the best interests of the chapter above all else.

- A young practitioner who wants to do a great job in a chapter leadership position will do great! We have many in our chapter. Seek them out - they may assume that unless you are a long standing chapter member, there is little chance of being involved at committee or board levels. Ask them, in a one on one conversation: How would you like to be a board member at large this year? Here is why we think you would be great.

- Seek out the experience of the senior chapter members. They are super people who are incredibly dedicated professionals - who believe in public relations and PRSA. We also have many of these folks in our chapter.

- Bottom line: be inclusive of all. Diversity is strength. By doing so, you will - on average - have more leaders available in the future years. Think 2005, 2006 and 2007 now.

*3. Consult with PRSA National on a regular basis.*

- Pick up the phone now, and make that call. Don't be afraid to honestly and sincerely share a situation with the appropriate national staff member. The PRSA national staff is a wealth of knowledge - they do a great job.

- PRSA Leadership Rally: ensure someone attends every year. Reread the handout materials periodically throughout the year. I do. It is amazing what you may forget in a few months. A simple read of the materials can really help - again.

*4. Consider merging two/three chapters.*

- This is easy to say we know. For example, a particular geographic area may be economically challenged. There simply is not enough people to support the chapter membership this year, never mind developing leaders for the future years.

- Realities: potentially more driving time for some members. Fair? Possible? Merging of bank accounts. Deciding which city to merge to in the distressed region. Who will

assume leadership right away?

- With e-mail, internet and some extra driving time for some, think it can be done.
- Bottom line: what is best for PRSA and the PR profession in the given distressed region? Two/Three chapters that refused to team then disappeared, or one chapter which, through some hard work and careful planning, began to even thrive.

### **C. Real World Example**

- A board member resigned due to personal reasons - what do you do? Thought: Immediately replace that individual to keep momentum going. Engage your Nominating Committee at the ready throughout the year, not just at the end when looking to the next year. Convene your NomComm regularly to provide perspective on active chapter members, committee volunteers, chairs, etc.
- "Two in the Box" - Create a tight working relationship between the President and President Elect, so board members and chapter members see two leaders. This helps in the annual transition. Have the P-E lead the Board training.
- The most engaged members are the most satisfied.
- Succession planning should continually be in force as "succession training."
- In Chicago, those that attend the Leadership Rally came back and presented the Leadership Rally content to the rest of the Board. Also, per Kelly Albanese, 2004 Leadership Rally materials will be sent to each chapter that didn't have representative attend.
- Get Board members all active on one national committee.
- Make the time and effort to do a comprehensive Board training at your first Board meeting. PRSA has experts at this.

A final thought: enthusiasm works. Members are very perceptive and can tell if you are genuinely enthusiastic towards PR and PRSA . If you are enthusiastic, they will be more apt to stay with the chapter, and ongoing opportunities will prevail throughout the year amidst the toughest crises.

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