



Succession Planning Grooming Your Successor

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For the Utah PTA Convention*

THERE IS NO WRONG WAY TO PTA



Our Shared Mission

*To make every
child's potential a
reality by engaging
and empowering
families and
communities to
advocate for all
children.*

P.T.A.

VERB /PEE-TEE-AY/

TO SUPPORT YOUR CHILD'S POTENTIAL IN
ONE OR MULTIPLE WAYS:

- 1) To invest in your child's potential.
- 2) To volunteer for your child's potential.
- 3) To advocate for your child's potential.



PTA Values

- **Collaboration:** We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

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Learning Objectives

- Understand the importance of developing your successor
- Learn the why, what and who of developing the leader next in line
- Build on the benefits of developing a successor
- Acquire the skills, traits, and best practices to train your successor
- Master strategies for succession planning that represent meaningful diversity, equity, and inclusion.
- Feel confident with delegation, development, and letting go!

Succession Planning Is:

- A process for replacement planning and passing on leadership roles
- It is used to identify and develop up and coming leaders to ensure continuity when they take over
- It is used to ensure the smooth transfer of power and responsibilities
- PTA should have an internal succession plan to identify potential to fill key, hierarchical positions in the association.



Five Essential Traits for Developing your Successor

- 1. Character:** Upholding integrity and a strong work ethic.
- 2. Confidence:** Demonstrating self-assurance and trust in relationships.
- 3. Capability:** Possessing innate leadership qualities and people skills.
- 4. Competence:** Exhibiting proven proficiency within the association.
- 5. Community Engagement:** Embracing a stewardship mentality and prioritizing collective well-being.

Why is succession planning important?

- It prepares your volunteers for growth,
- It improves opportunity for advancement, engagement, and retention among volunteers
- It allows you to plan for turnover, avoiding gaps that often occur as you recruit new volunteers for the right candidate and then bring them up to speed on your mission, vision, culture, and operations.
- Because succession planning is a relatively transparent process, it can be less disruptive to your association than unplanned turnover and an external candidate

The Benefits of Developing Your Successor

- Talent retention and cost savings
- Increased productivity
- Continuity and engagement
- Roles are defined
- Creates clear communication and alignment
- Builds leadership pipelines
- Mitigates risk
- Helps prevent confusion
- Makes a leader's departure run smoothly

A good succession plan starts with you!

- Do you have a succession plan?
- What does it look like?
- Who leads it?
- Where is it taking you?
- Does it have positive intentions?
- Is it cost effective?
- Is it in line with your strategic plan?
- Do you see potential growth in leadership within your PTA?



Moving on and Letting go!

- The day you take office is when you begin developing your successor
- Delegation is essential in grooming your successor
- Micromanaging hurts the entire association
- Think big!
- Align with your strategic plan and your bylaws
- Always be openminded- listen to learn
- Step aside for the next in line
- Know when to lend a supportive hand

It is a marathon, not a sprint!

- Associations are designed to pursue high level value that requires consistent organized attention over time.
- Special challenges for associations: The route keeps changing and there is NO finish line.



Flexibility is required!

- Associations must evolve.
- Be less like a roadmap (static) and more like a GPS.
- Use hindsight, foresight and insight.
- Change is hard, having a succession plan will keep you moving forward.
- Flexibility is key!



How do I begin develop my successor?

- **Succession planning starts by bringing your association together to create a shared vision for your future.**
- **Rather than relying on traditional succession planning tactics, harness talent to identify the next generation of leaders.**
- **Think outside the box but do it in a collaborative way.**

Inclusive Practices are a must!

- **DEI Audit:** Set benchmarks and evaluate your current diversity and inclusion efforts. Are you being intentional?
- **Diversity Strategy Development:** Collaborate with key interested parties to create a diversity strategy aligned with your association's goals.
- **Implementation Rollout:** Facilitate seamless training, online learning, policy development, and effective communications.
- **Internal and External Communications Support:** Develop a clear and impactful plan to communicate your DEI initiatives.

Risks of Not Planning Ahead

- ★ Loss of institutional knowledge
- ★ Disrupted programs and partnerships
- ★ Reduced member engagement
- ★ Emergency or last-minute leadership decisions
- ★ No one in your leadership pipeline



Core Principles of Succession Planning

- ★ Start early, not at the end of your term
- ★ Be transparent and inclusive
- ★ Develop multiple potential leaders
- ★ Focus on skills, not just titles



Communicating About Succession

Normalize leadership transitions

Be clear about timelines and
Invite interest openly

Avoid informal or exclusive
processes



Identifying Potential Successors

- 1) Look for engaged, reliable members
- 2) Observe informal leaders and influencers
- 3) Encourage diverse voices and representation
- 4) Pay attention to those who ask questions and take initiative



Mentorship in Action

- Regular check-ins and guidance
- Share decision-making processes
- Invite participation in key conversations
- Model leadership behaviors



Supporting the Transition

- Overlap between outgoing and incoming leaders
- Clear handoff of responsibilities
- Continued availability for guidance
- Respect new leadership styles



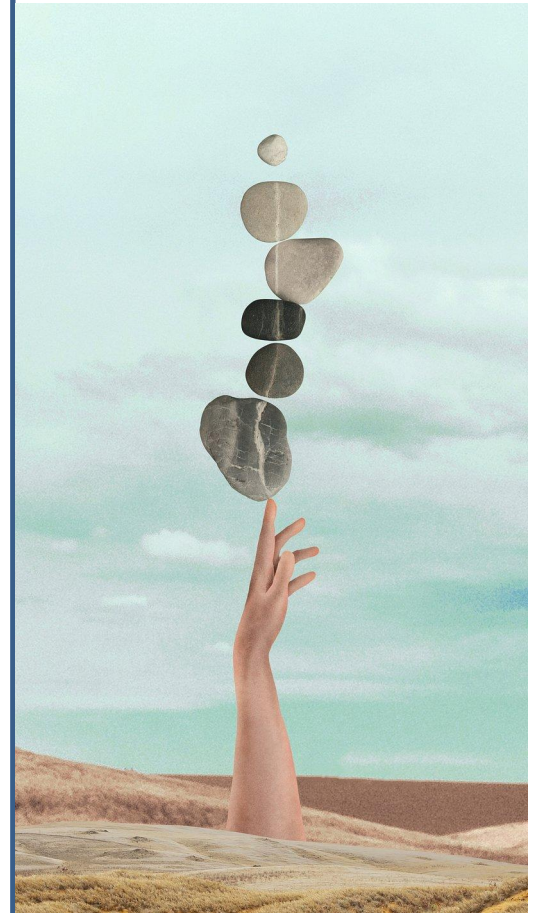
Knowledge Transfer

- **Document processes and timelines**
- **Share contacts and partnerships**
- **Maintain organized files and systems**
- **Create transition guides or playbooks**



Letting Go As a Leader

- Avoid micromanaging successors
- Trust the process you helped build
- Shift into advisory role if appropriate
- Celebrate the next leader's vision



Creating Leadership Pathways

- Committee → Officer → Executive roles
- Task-based opportunities for new volunteers
- Clear expectations for each role
- Encourage gradual growth

Reflection Questions

- ❖ **Who could step into role today?**
- ❖ **What knowledge have you not documented?**
- ❖ **How are you developing future leaders?**
- ❖ **What barriers exist in your PTA?**

Special Considerations for Local PTA Units

- **Smaller volunteer pool**
- **Greater reliance on a few individuals**
- **Focus on relationship-building**
- **Simplify roles to reduce barriers to entry**
- **Families are overscheduled**
- **Limited capacity**



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Strategies for Local Units

***Actively recruit parents and caregivers early**

***Use co-chair or shadow roles**

***Break large roles into manageable pieces**

***Celebrate and recognize emerging leaders**

Tools & Resources

All resources should be translated into both English and Spanish and allow your PTA opportunities to customize for your community.

PTA leadership guides

Training workshops/webinars

Templates for transition documents

Peer networks and mentorship opportunities

At Your Own Pace and Tech-Free

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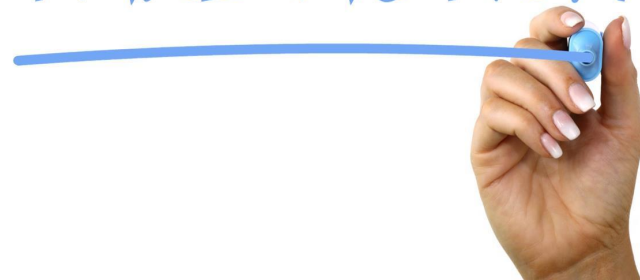
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Action Steps

- Identify at least 2 potential successors
- Delegate one new responsibility this month
- Begin documenting key processes
- Schedule a leadership development conversation

TAKE ACTION



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After this Presentation Consider

- What is one concrete step you now see as your responsibility in building a leadership pipeline?
- How would you explain the difference between replacing a role and developing a successor?"
- Who is one person you currently work with that you could begin intentionally developing and what would that look like?
- What risks do we face as an organization if we don't actively plan for leadership transitions?

“Strong PTAs don’t rely on one leader—they build many.

Succession planning is an investment in sustainability, equity, and impact.”





Thank You!



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