



Election process and succession planning best practices

These best practices illustrate how you can introduce an effective and transparent election process to your section or chapter, and ensure regular officer turnover and effective succession planning to maximize your group's potential.

Get the right level of flexibility

Flexibility is key for maintaining an effective board; the ever-changing industry environment, along with changes within board members' professional and personal lives, may mean they will no longer be able to fulfill their responsibilities and replacements will need to be recruited. Thus it is important to have turnover of officers as and when needed, to ensure all responsibilities are covered, new officers are recruited to bring new ideas, and existing officers are progressed or reassigned to maintain experience within the group and aid overall succession planning.

Introducing a fair and transparent election process

Election processes take many different forms when comparing those from sections and chapters around the world, often influenced by cultural and political differences as well as local laws and regulations. SPE has put guidelines together of an election process which sections and chapters are recommended to adopt where possible, to aid transparency and fair recruitment process.

[Visual of election process](#)

Once you have established how the election process will take place, it is also important to determine how it will be conducted, i.e., in person at the AGM, by post or electronically, and what tools you have at your disposal to make this happen.

As illustrated in the visual, you should allow for around 3 months for the entire election process to be completed. Thus it is also important to think about the time of year to conduct this; whether you will go by calendar year, financial year, or term dates (for student chapters), and also taking into account local holidays and other major events in the calendar that might influence your participation. The officer term times should link into the overall timing of the election process, so these can be consistent across the board.

The importance of a regular turnover and succession planning

It is recommended that board officer terms should be a maximum of 3 years. As with any organization, it is important to bring new ideas to the table and allow members to progress within the organizational structure. This should be no different when it comes to how sections and chapters are run. Having a regular turnover of officers within your board will aid progression and innovation. It will also help keeping your board representative of your membership at-large, and in turn to better align the board objectives with the needs of the members they serve. For example, if the population of young professionals is growing amongst section members, then it is important to give this group a voice on the board and get programs and services in place tailored specifically for them.

For further information visit www.spe.org/sections or email sections@spe.org



Although a regular turnover of officers can be beneficial, it is also important to maintain a healthy amount of expertise and experience on the board to ensure new members are fully supported and integrated in the day-to-day operations. To allow for effective succession planning it is therefore recommended that terms of service are staggered. For example, if the board operates on a three year maximum term of officers, around 1/3 of all officers should be replaced each year. Sections and chapters may decide whether they will reinstate officers to serve in the same role again in a consecutive three year period, permitting they have received a majority vote.

In an ideal world, all officers will serve their full term and fulfill all responsibilities as agreed, however we all know that in reality this will not always be possible. Thus it is important to be prepared and have a plan B (and C and D for that matter). Other commitments your board members may have in relation to their professional and personal lives, will mean that sometimes you will need to recruit and replace them sooner than anticipated. The SPEI operating guidelines recommend that if at any time during the term a board member resigns, the section chairperson will select a member to fill the vacancy for the remaining term. If the section chairperson resigns, the program chair will become the chairperson and appoint another member as program chair. In the case for student chapters, the Vice President will succeed the President upon resignation. Alternatively, your section or chapter may decide to re-elect for the positions instead. Any position that is not a core voting position can be appointed by the board as and when required.

Welcome to the team

Once new officers have been recruited, it is important they are provided with the relevant training and participate in onboarding processes as required, to be able to successfully fulfill their responsibilities further down the line. Especially for the Chair /President position, your section or chapter is likely to have someone working alongside them for some time in the roles of Program Chair and Vice President respectively, before any official handover happens. Other than transferring knowledge and experience through 'on-the-job' training, it is important to get documentation and correspondence transferred too. By utilizing secure SPE tools such as Informz, Membership Builder, SPE email accounts and SPE Connect for file sharing and online discussions, you can protect your section or chapter from losing crucial information during officer transitions. Even when officer turnovers happen quicker than anticipated, and there is little or no handover, SPE staff will be at hand to assist your chapter and section with training on how to use the tools and resources, and access the information you need to get operations back up and running.