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## **Using Playbooks to Guide Leadership Transitions in Voluntary Groups and Community Organizations**

### **Abstract**

Leadership changes can result in confusion for voluntary groups or community organizations. Traditionally, new leaders have received board training or been expected to learn by doing or reviewing existing policies. The National Association of Community Development Extension Professionals (NACDEP) took a new approach, with those in leadership roles developing "playbooks" to guide incoming leaders. The process has proved to be successful for NACDEP and is now being replicated by other organizations.

**Keywords:** [leadership](#), [succession planning](#), [transition](#), [playbooks](#)

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Leadership changes in voluntary groups or community organizations can bring about a period of confusion. Many times, new board members or committee chairs begin their terms with a limited understanding of their roles and responsibilities. Orientation and training workshops are the standard approaches to handling this dilemma. Recently though, one Joint Council of Extension Professionals (JCEP) organization has moved beyond such methods with a more systemic approach that has shown beneficial results in the brief time during which it has been implemented.

### **Background**

The National Association of Community Development Extension Professionals (NACDEP) created "playbooks" for its board members and committee chairs in 2016. This was an initiative of Kelly Nix, who served as president-elect in 2015–2016 and president in 2016–2017. The purpose of developing the playbooks was to smooth organizational transitions by capturing the knowledge of previous office holders and committee chairs. The assumption was that doing so would decrease the learning curve (and learning time) for those moving into new leadership positions and improve organizational efficiency.

Those who held key positions received a template to fill in, the content of which was based on ideas developed

during a board retreat in the fall of 2015. The 2015–2016 organizational officers and regional representatives developed the initial playbooks. Then the process expanded to include the 2016–2017 committee chairs. Kelly Nix and Stacey McCullough, 2015–2016 president, answered questions and reviewed the playbooks to ensure that they contained all required information.

The information included in the playbooks expanded on the standard listing of organizational policies and procedure with descriptions of the responsibilities and expectations of each position. This information included a detailed breakdown of activities—what was to be completed and when. Inclusion of such material made the guides true "playbooks" that could be followed by those who came into leadership positions in 2017–2018. Once the playbooks were finalized, the NACDEP board approved them and incorporated them into the organization's policies and procedures.

A search of the literature revealed no equivalent to the playbooks. The importance of preparing people for board member roles was clear, but the outlined methods for doing so were very traditional. Teuteberg and Brandt (2018), for example, stressed the value of board member orientation for voluntary organizations and suggested that such an orientation could be accomplished during a board meeting. This traditional training approach would include providing guidance on areas such as mission and vision, current direction and goals, organizational culture, governance and decision-making process, performance measures, and basic dos and don'ts.

Others have looked at the importance of preparing individuals to take on leadership positions in other realms. For example, Folkers (2008) examined Nebraska state government and outlined the importance of having succession planning and management in place for all critical positions. However, he found that few state agencies actually had established such practices, even though there were potential impacts on operations and service related to filling critical positions.

In congressional testimony, J. Christopher Mihm, director of strategic issues for the U.S. Government Accounting Office, stated that leading government organizations worldwide go beyond a succession planning approach that focuses on simply replacing individuals and engage in broad, integrated succession planning and management efforts that focus on strengthening both current and future organizational capacity (U.S. Government Accounting Office, 2003). Later, McKee and Froelich (2016) found in research focusing on CEOs that the most common reason nonprofit organizations undertake succession planning is to ensure continuity of activities.

Also, a similar theme can be found in the private sector. Groves (2007) discussed how to effectively marry leadership development and succession planning systems while fully engaging managerial employees in the process. His work focused on identifying and training future leaders through mentorship and reinforcing organizational culture.

## Utilization

Developing these guides was only the beginning. For them to have meaning, it was necessary that they meet two criteria: They must be used, and they must be deemed to be useful. To that end, those holding leadership positions in NACDEP in 2017–2018 received online surveys via Qualtrics about the playbooks. This was the initial group of organizational leaders who had access to the playbooks.

A total of 13 organizational leaders responded to the brief questionnaire—eight elected board members and

five committee chairs. Almost all (92.3%) had served on other boards previously, so virtually everyone came into his or her position with some idea (based on past experience) of what it meant to serve in a leadership capacity. Respondents said that in their previous positions they had learned about their roles and responsibilities by reviewing documents (such as standard policy documents), talking to others (such as a predecessor or another board member), and experiencing on-the-job training (and making mistakes).

Meanwhile, more than two thirds (69.2%) reported knowing little if anything about the role they were taking within NACDEP. So not surprisingly, the playbooks proved to be invaluable. The guides met both criteria set forth above—they were used and they were useful. Almost all the respondents (92.3%) said they used the playbooks at least to some extent, including more than half (53.8%) who said they used them to a moderate extent or to a large extent. Board members and committee chairs said they used the guides to learn about organizational structure, clarify roles, and gain understanding of a timeline and a to-do list for actions. The last of these uses demonstrates how the playbook content goes beyond the standard information organizations generally include in their administrative documents.

Furthermore, even those who may not have used the playbooks as much as others could see their importance. A couple of respondents noted that they did not use the playbooks much because they had written them. Also, one respondent noted that the playbooks worked better for more established positions than for newly created ones.

Overall, more than three quarters (76.9%) said they knew a lot or a great deal about their respective board roles after having referred to the applicable playbooks. Additionally, almost everyone (92.3%) said the playbooks helped them understand their board requirements. Meanwhile, more than three fifths (61.5%) said the playbooks helped them be more prepared for board meetings.

## Outcomes

The use of the playbooks has expanded and evolved since the survey took place. Two cycles of officers, board members, and committee chairs have moved into leadership positions in NACDEP and received access to playbooks that had been reviewed and updated to help with the transition. In mid-2018, Michael Dougherty, then NACDEP secretary, reviewed the playbooks, edited them for constancy, and posted them on the NACDEP website (<https://www.nacdep.net/other-resources>), separate from the organizational policies section, where they can be directly accessed by the membership—including persons considering moving into or seeking board roles or committee chair positions. In mid-2019, Susan Kelly, the 2019–2020 NACDEP president, asked for revisions and updates to the playbooks to ensure that they remained accurate and reflected current practice. This periodic updating should help ensure continued utility for the playbooks.

The process of creating playbooks such as those described here can be easily replicated by other Extension organizations. Two key strategies are needed: Board members must outline the playbooks, and someone in leadership must direct that process. Already, other entities have taken notice and begun to use this model. For example, the JCEP national board implemented the process of using the playbook system for its members (E. Claypoole, personal communication, May 24, 2018). Likewise, Epsilon Sigma Phi has considered doing the same (K. Tweeten, personal communication, November 6, 2018). Essentially, the process of creating playbooks to guide leadership transitions can be used with any group or board with which Extension educators work.

### Author Note

Kelly Nix was an associate professor and Extension leadership specialist in the Family and Community Development unit of the West Virginia University Extension Service when the playbook project started but moved to John Chambers College of Business before this article was written. We want to express our appreciation to Jeremy Lambson, an administrative assistant for West Virginia University Extension Service, who worked on the original literature review for the article.

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