



Succession Plan

Setting up for success beyond the “coach” and the first 5 years of Hometown Pride

Decisions and plans for the future of a community are best made by the people who live, work and sleep there. Hometown Pride aims to build local leadership capacity by growing the pool of individuals who can serve their community proactively and independently. Keep Iowa Beautiful provides funding for the Hometown Pride “coach” for 5 years, but the hope is that the program will continue well beyond those 5 years, under local leadership and funding. **A strategic succession plan begins on day one**, by establishing a firm foundation and strong reputation.

Years 1-5: Building a firm foundation

Establish the appropriate role of the “coach”

Community members are the ones “playing the game,” while the coach is on the sidelines helping the team develop game plans, stay motivated, and connect to resources. The coach works *with* the volunteer team rather than doing the work *for* them. (For example, the coach provides advice on the best ways to raise money for a project, rather than going out and raising the money themselves.) *Empowering volunteers with leadership skills will benefit the community long after the coach’s work is done.*

Cultivate a deep bench of volunteer leaders

Ensure you are not dependent on only one or two people to sustain your Hometown Pride committee:

- Bring in new volunteers every year. Recruitment is a never-ending process!
- Elect officers annually to allow people the opportunity to step up to leadership roles, and equally importantly, to allow established leaders to exit gracefully when they wish to.
- Consider limiting terms to no more than 2 years in the same officer position, to avoid over-reliance on one person. (If volunteers are in short supply, you could rotate your existing officers to different positions so you have more than one person who knows how to do each role).
- Consider having regular regional meetings where you bring together Hometown Pride volunteers from different communities to swap ideas and cheer each other on

Collaborate with existing community groups

Hometown Pride was created to add value, not to compete with what others are doing. Work with groups like the Chamber of Commerce, Community Foundation, “Friends of ___” groups, Service clubs like Rotary, Park committee, School, etc. Support their efforts and invite them to join yours. If multiple groups are committed to the success of a project, that increases the chances it will be sustained.

The coach should help build collaborations by “embedding” themselves in the local community: attending events and following local media and social media. This will help them understand town needs, build trust, and find potential volunteers and partners.

Build up the Hometown Pride Brand

The more that the community knows about Hometown Pride, the more they will be committed to keeping it going. Build up awareness of the program from day one by:

- Consistently using the “Hometown Pride” name in your work
- Posting signs/banners with the Hometown Pride logo at events or on site at your projects and/or having volunteers wear shirts with the name/logo
- Establishing a social media account and assigning a volunteer to keep it active
- Reaching out to news outlets to tell them about your work and encourage coverage
- Sending Hometown Pride reps to other community betterment efforts or organizations (e.g. have a representative on the city’s strategic plan committee, or present at Rotary)

Look for quick wins, while also pursuing big picture goals

Balance big ideas with some smaller projects that can provide quick wins, especially in the first 1-2 years. This will keep volunteers fired up, attract “doers,” and demonstrate progress to the rest of the community.

Report success to local partners annually

Report annually or semi-annually to local officials and funders about the successes of the program and plans for the coming year. This may include presentations to the city council, the board of supervisors, or the local economic development board. These partners can help keep Hometown Pride going in the long term, so they need to know the value of the program. Share things like:

- Success stories and photos
- Number of: projects, volunteers, amount of money raised, and attendance at events
- Partnerships with other organizations and entities

Year 2.5: Halftime report

Gather Hometown Pride volunteers, stakeholders and funders to review the goals that were established by the Hometown Pride Committee(s) at the outset of the program. Hold a meeting to:

- Share community successes and challenges.
- Acknowledge individuals and organizations who have contributed to successes
- Reflect on things that didn’t work as teachable moments and learning experiences
- Discuss strategies to address on-going challenges
- Set goals and envision what success will look like in the next 2.5 years. What will we say at the 5-year mark?
- Discuss how to make the program sustainable: finances, volunteer engagement, etc.

Remember to document the information above in writing for future reference.

Years 2-5: Establish long-term, sustainable funding sources

Consider working with your County Foundation to set up a community projects fund, which can allow donors to give to Hometown Pride projects. Or consider establishing a community endowment, which allows you to build up a large principal and take annual distributions off the interest, so the fund is never depleted. If funding is available for years to come, people will stick around to make sure it is spent well!

Year 3: Explore succession options for Year 6 and beyond

Explore options for post-5-year succession; start early conversations or lay groundwork for possible paths:

- Option 1: Identify an existing organization that could serve as a future “hub” of county-wide Hometown Pride efforts - an organization that would support volunteers, advocate for the program, and/or provide staff support to take over where the “coach” left off at the end of year 5.
- Option 2: Identify potential local funding sources that would allow continued coaching support beyond year 5. This could mean keeping the existing coach if possible, or hiring a new one.
- Option 3: Take steps that will allow Hometown Pride committees to continue independently as volunteer-run organizations (without a “coach” or staff person), such as establishing 501(c)3 status, writing bylaws, and establishing clear volunteer leadership succession plans.
- The above are suggestions only – feel free to create your own unique plan.

Year 4: Make transition plans

- Ask each HP community if they plan on continuing Hometown Pride efforts after year 5.
 - While continuation is strongly encouraged, we should also be practical. If the committee doesn’t plan to continue, make plans to finish or hand off projects to other organizations.
- Ask committees if they want to continue to have a “coach” or some form of staff support.
 - If continued “coaching” is desired, explore options (see above): Get local funding to keep the current coach or hire a new one; or arrange to get staff support from an existing organization.
- Assess current volunteer leadership
 - Will existing volunteers continue after year 5 to help with the transition? If needed, recruit new leadership now to train them before the transition.
 - Regardless of plans of current volunteers, continue on-going recruitment of new volunteers.

Year 5: Enact transition plan, celebrate success

- Finalize and enact transition plan made in years 3 and 4
- Have the coach start to step back, handing off important information and tasks to volunteers, future staff/coach, and/or the new “hub” organization
 - Or, if coach will be continuing: confirm funding, set expectations and sign contract
- Make presentations to partners, asking for continued support and sharing the transition plan
- Celebrate success! Coaches should consider doing one or more of the following to make sure that the first 5 years of success are documented and shared:
 - A report of 5 years of Hometown Pride success, with photos (could be documented on a website, on social media, as a powerpoint presentation, or a written report)
 - Recognition of volunteers and successful projects on social media or elsewhere
 - Reach out to media and elected officials to share the story of the past 5 years
 - Written case studies of particularly successful projects or communities
 - A celebration event or county-wide bus tour to view all of the successful projects

*Based on original document created by Hometown Pride coach Doug Friedli, 2017
Revisions and additions by Keep Iowa Beautiful and Hometown Pride Coaches, 2023*