

SUCCESSION PLANNING 102

Recruitment and Retention Council
December 2, 2025
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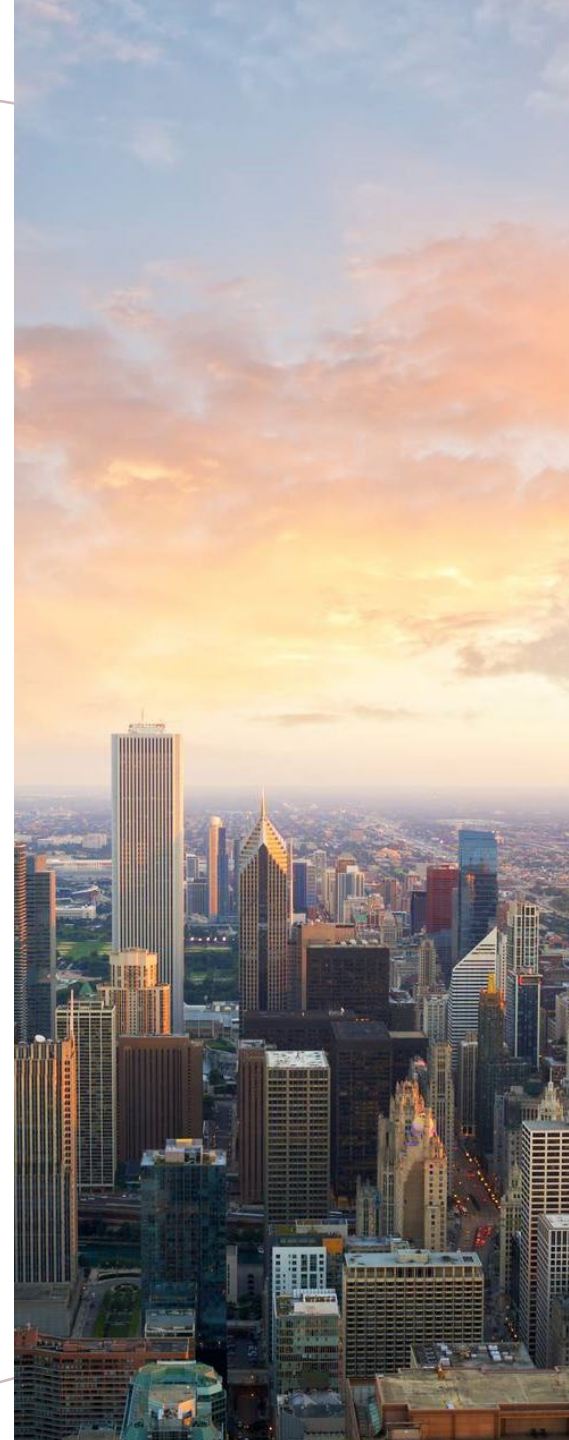
RECAP OF PART 1

Purpose of succession planning
Leadership Assessment
Leadership Development
Access Points for Future Leaders



Agenda

- Developing a Plan
- Planning a Timeline
- Developing Organizational Charts
- Monitoring and Evaluation





DEVELOPING A PLAN

- Identify Critical Roles
- Define Key Skills & Competencies for *These* Roles
- Building a Talent Pool
- Development Pathways

1) WHAT ARE CRITICAL ROLES
FOR YOUR LOCAL'S OPERATION
AND FUTURE?

2) WHAT SPECIFIC SKILLS ARE
REQUIRED FOR THESE ROLES



PLANNING A TIMELINE

➤ Short-Term (0-1 year):

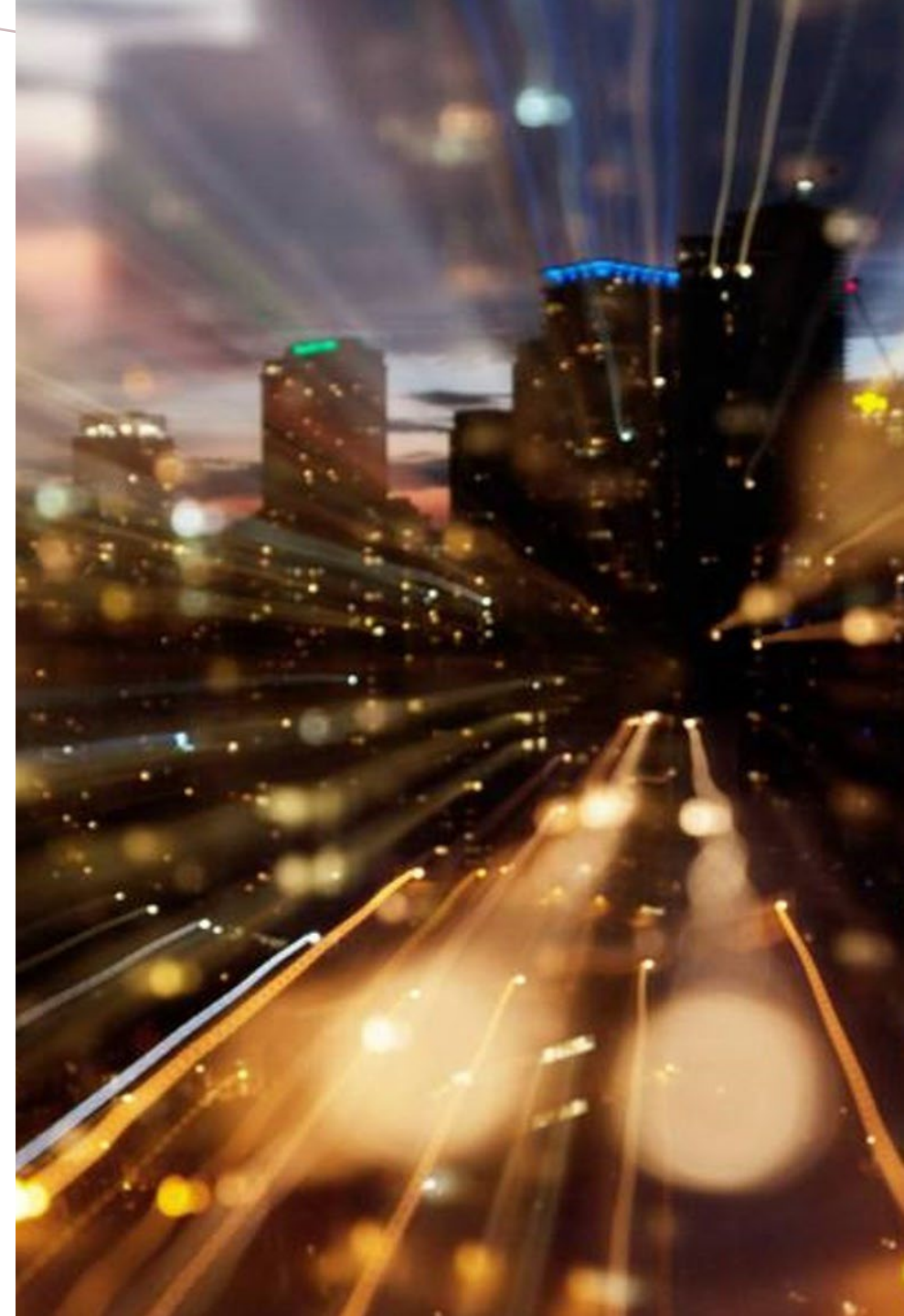
Focus on immediate needs, existing high-potentials, filling known vacancies, initial mentor pairings.

➤ Mid-Term (1-3 years):

Developing a wider pipeline, structured training programs, rotational experiences.

➤ Long-Term (3-5+ years):

Anticipating future needs, strategic growth, diversity goals.

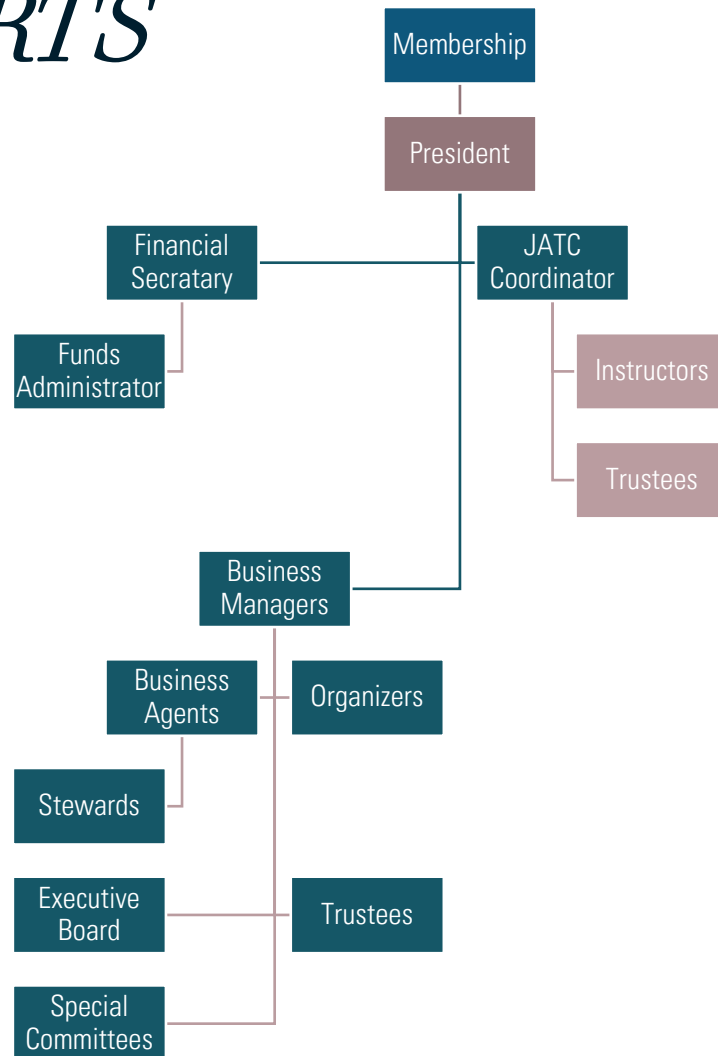


1) WHAT IS AN EXAMPLE OF A
SHORT-TERM DEVELOPMENTAL
ACTIVITY?

2) WHAT IS AN EXAMPLE OF A
MID-TERM GOAL?



DEVELOPING ORGANIZATIONAL CHARTS



Sample Organizational Chart Outline:

I. The Membership

- **Ultimate Authority:** Elects officers, votes on Collective Bargaining Agreements (CBAs), constitutional changes, and major policy decisions.
- **Rights & Responsibilities:** Attends meetings, participates in discussions, votes, and adheres to the Local's bylaws and constitution.

II. Elected Leadership / Governing Bodies

- **General Membership Meetings**
 - Forum for all members to participate in decision-making and receive updates.
- **Executive Board** (often the primary governing body between general meetings)
- **President**
 - Presides over all meetings (General Membership, Executive Board).
 - Chief executive officer of the Local.
 - Represents the Local externally.
 - Ensures adherence to the Local's constitution and bylaws.
- **Vice President**
 - Assists the President and assumes duties in their absence.
- **Financial Secretary-Treasurer**
 - Manages the Local's finances, dues collection, disbursements.
 - Prepares financial reports.
 - Responsible for financial compliance.
- **Recording Secretary**
 - Records minutes of all meetings
 - Handles official correspondence and record-keeping.
- **Business Manager / Business Agent (often a combined or chief role)**
 - Manages daily operations of the Local.
 - Negotiates and enforces CBAs.
 - Handles grievances and represents members in disputes.
 - Supervises other Business Agents/Organizers.

* *Note:* In some Locals, this is an elected position; in others, it might be an appointed position reporting to the Executive Board or President.*

- **Trustees**
 - Oversee the financial books and records.
 - Conduct audits to ensure financial integrity.
- **Executive Board Members-at-Large**
 - Represent the general membership on the board.
 - Participate in decision-making and policy formulation.
- **Sergeant-at-Arms**
 - Maintains order at meetings.

III. Operational & Representational Roles

- **Business Agents / Organizers**** (Report to Business Manager)
 - **Business Agents:** Work directly with members on job sites, handle grievances, address workplace issues, enforce CBAs.
 - **Organizers:** Focus on recruiting new members and expanding the union's presence in unorganized workplaces.
- **Shop Stewards / Job Site Stewards** (Appointed or Elected, Report to Business Agents/Membership)
 - First line of representation for members on the job site.
 - Monitors contract compliance, identifies potential grievances, educates members.
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IV. Joint Apprenticeship and Training Committee (JATC) / Training Center

** Note: Often a separate, jointly managed trust fund with employers, but integral to the union's success.*

- **JATC Trustees / Board:** Union and employer representatives overseeing the training program.
- **Apprenticeship Coordinator:** Manages the overall apprenticeship program, placements, and member progress.
- **Apprentice Liaison:** (As mentioned in notes) Could be a specific role within the JATC or even on the Executive Board, focused on apprentice engagement and support.
- **Instructors:** Deliver classroom and practical training.
- **Training Center Staff:** Administrative support for the facility and programs.
- **Journeyman Upgrading & Continuing Education:** Programs for existing journeymen to enhance skills and certifications.

V. Standing Committees (Examples) (Report to Executive Board or President)

- **Bargaining / Negotiating Committee:** Develops and negotiates CBAs.
- **Political Action Committee (PAC) / Legislative Committee:** Engages in political advocacy, lobbying, and fundraising. (Might include "SMART Army" activists).
- **Health & Safety Committee:** Addresses workplace safety issues, conducts inspections. * **Organizing Committee:** Supports organizing efforts.
- **Membership / Outreach Committee:** Focuses on member engagement, new member orientation.
- **Finance Committee:** Oversees budgets and financial planning (distinct from Trustees' auditing role).
- **Education Committee:** Develops and promotes educational programs for members.
- **Retirees Committee:** Engages retired members, advocates for their interests.
- **Women's Committee / Diversity & Inclusion Committee:** Addresses specific needs and promotes participation of diverse member groups.

VI. Administrative / Support Staff (Report to Business Manager or Financial Secretary-Treasurer)

- Office Manager
- Administrative Assistants
- Bookkeepers / Accountants
- Communications Specialist (if applicable)

VII. Affiliations & Delegates

- **International Union (SMART - International Association of Sheet Metal, Air, Rail and Transportation Workers):** Locals are part of a larger international union.
- **Delegates to International Conventions.**
- **State / Local Labor Councils (e.g., AFL-CIO):** Representation at broader labor movement bodies.
- **Building & Construction Trades Councils:** Collaboration with other construction trades unions.
- **Regional Councils / Conferences:** Participation in regional SMART gatherings.

SAMPLE ORGANIZATIONAL CHART OUTLINE

1) IMAGINING YOUR
ORGANIZATIONAL CHART, WHAT
GAPS IN THE LEADERSHIP
PIPELINE DO YOU SEE?

2) CAN YOU THINK OF A FEW
PEOPLE IN YOUR
ORGANIZATION WHO COULD
ONE DAY STEP UP INTO
LEADERSHIP ROLES?



MONITORING AND EVALUATION

- Readiness
- Participation
- Diversity
- Feedback



1) WHAT WOULD SUCCESS LOOK
LIKE TO YOU?



KEY TAKE AWAYS

Identify critical
roles, skills and
talent

SMART Timeline

Transparent
Pathways

Vision of Success



RESOURCES

SMART University – TD

<https://www.smart-union.org/smart-university-td-membership-101-available-in-member-portal/>

SMART Production Institute

<https://www.smart-union.org/new-production-institute-training-helps-local-leaders-better-serve-production-workers/>

SMART COMET 2.0

<https://www.smart-union.org/local-18-empowers-members-with-comet-classes/>

International Training Institute

<https://www.sheetmetal-iti.org/Default>

SMOHIT MAP Peer Training

<https://www.smohit.org/smart-map/>



THANK YOU