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Strategies for International Board Successions and International Scholarship Program Development

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Abstract

Executive Boards and Councils must plan for systematic, well-ordered succession and revitalization processes to uphold and support the organization over the institution's lifetime. Considerable disruption can occur when an organization unexpectedly loses an executive leadership team member. The author presents several proven strategies and steps for designing and implementing a Board Succession Plan to realize a non-profit organization's long-term effectiveness and success, such as Phi Beta Delta International Honor Society International Board or the Executive Board of one of its chapters. Additionally, to aid the successful growth and development of the Phi Beta Delta organization during the organizational life cycle stages (start-up, growth, maturity, and decline), the author recommends fostering proactive board member development and nurturing with the initiation and evolution of a scholarship development program.

Keywords: Executive Boards, Leadership, Successions, Board Strategies, Scholarship Development, Leadership Development, Organizational Structures, Organizational Life Cycles

Background of the Work

Executive Board and Council development efforts and succession strategies can provide key performance indicators for an ongoing non-profit organization. However, earlier research has suggested that little attention is paid to the area of organizational structure known as succession planning in nonprofit organizations. It was noted in a study conducted by Frolich, McKee, and Rathge and cited in the *Nonprofit Management & Leadership Journal* (2011) that although the success of a nonprofit organization is heavily reliant on the executive leadership at the top of the organization, the planning and groundwork for the transition event did not equal the degree of interest and concern voiced by the executive directors of 501C3 charitable nonprofits and CEOs of 501C4 operations. It was stated that “although the replacement of long-serving leaders is acknowledged as difficult, few proactive steps are undertaken” (p. 3).

As Tyler (2022) reported, in a survey of 580 Society of Human Resource Management (SHRM) members actively employed as human resource professionals, only 21% of the respondents stated their organization had a formal board succession plan, with 24% suggesting an informal plan was in place.

In a study led by Sargeant and Daly (2018) exploring organizational practices associated with succession planning in nonprofit organizations, the authors discovered that over 75% of the study participants reported no formal succession planning within their nonprofit organizations. It

also pointed out that planning for succession in key leadership positions was often absent. The study described that as few as 40.8% of U.S. nonprofit organizations identified prospective leaders in advance of their need to replace the key members in these positions. In summary, this study concluded there was a lack of succession planning in nonprofit organizations in the United States, and it is very likely that only a small percentage of these organizations engaged in any succession planning.

Practical Applications

A leadership deficit can harm the current and future life of the organization. For nonprofits to survive in today's uncertain environment, an appropriate leadership development protocol, membership engagement, and succession strategies should be employed.

Nature and Purpose of the Paper

This paper presents several succession strategies and steps for designing and implementing a Board succession plan to realize the long-term effectiveness and success of a Phi Beta Delta International Honor Society International Board or the Executive Board of one of its chapters. Additionally, to aid in the successful growth and development of the Phi Beta Delta organization during the organizational life cycle stages (start-up, growth, maturity, and decline), the author recommends fostering proactive board member development and nurturing with the initiation and evolution of a scholarship development program.

Discussion

The Phi Beta Delta Organization

Phi Beta Delta Honor Society for International Scholars (PBD) (n.d.) is an academic honor society, a non-profit international educational institution established in 1986 with one hundred and ninety-five United States chapters and eleven international chapters. The Phi Beta Delta organization guides the successful establishment of a chapter, the creation of an organizing committee, and suggestions for selecting members. The standard guidelines also provide a template for by-laws, rules, and regulations. A section of the Bylaws provides chapter governance and introduces the functions of chapters, duties of officers, powers and responsibilities, and the rules related to eligibility for membership. These insights into the proper structure and organizational design of the chapter institutions are instructive and greatly assist interested parties in starting new chapters and smoothly organizing and operating the club. Creating and implementing a board succession strategic plan to develop and initiate new leaders into the chapter's top-tier board positions should be considered to further assist the Phi Beta Delta chapters in continuing to act responsively throughout the life of the chapter. A proactive step in nurturing the organization's growth and development is the establishment of a Board Succession Plan.

The Role of the Board Succession Plan

A well-designed Board Succession Plan allows a committed executive board to effectively match the organization's immediate and future needs with the existing membership and recruit chapter members. Board succession planning successfully coordinates the member's talents and interests with the organization's future vision as it matures. A board succession plan is analogous to a ship's rudder. A ship's rudder is integral to the boat's steering and navigation mechanism. It is a movable piece of metal or wood attached to the stern of the ship and used to maneuver and guide the boat. The rudder is a vital element of a ship's steering system, allowing it to navigate safely and effectively. In mythology, the rudder represents the ability to control life's variable and erratic fortunes. Therefore, like the rudder of a ship, the Board Succession Plan of an organization is designed to steer the organization effectively and is intended for successful navigation through the unexpected occurrences in life that can leave an organization with vacancies in critical key positions. A well-constructed Board Succession Plan provides the non-profit organization such as the PBD Chapter with an effective rudder, a backup motor, and perhaps even wooden boat paddles in cases of an unforeseen situation or emergency that occurs while sailing the organizational uncharted waters. It helps to maintain a balance of power and pivots and directs more seamless transitions to safely minimize any potentially damaging impacts to the organization while moving forward.

Three Steps for Long-Term Board Succession Effectiveness

Three steps are urged for long-term effectiveness in the Phi Beta Delta Chapter Organizations. The chapter Board members spearhead these steps.

Assess Current Capabilities

The first step is assessing the Board's current capabilities and composition. Conduct a comprehensive evaluation of the Board's strengths and weaknesses. Recognizing what areas of leadership strengths are evident and material and realizing the gaps in skills and competencies related to Board membership is an exercise in prudent self-governance. Having the ability as a group to regulate itself without external assessment, self-reflect, analyze, and present a plan moving forward to alleviate shortcomings is an honor and a challenge. However, assessment templates and tools are available for Boards desiring to evaluate talents and needs. Candid informal and formal Board discussions identifying strengths and weaknesses, opportunities, and threats can be equally helpful in this task. A SWOT (strengths, weaknesses, opportunities, and threats) analysis of the PBD Board and Organization can be a valuable tool for self-evaluation. SWOT is an organizational framework used to evaluate an institution and help develop overall strategic plans focusing on the current and future potentials of the organization.

Determine Future Needs

The second step is determining the organization's and the Board's future needs. An annual Board evaluation provides accountability and positive benchmarks for growth and success. A performance analysis of how the organization is doing and how effectively the Board is moving

toward meeting the Chapter's goals is a valuable way to gauge Board functioning and to improve Board practices. This is an exciting opportunity at no cost to create strategic actions to encourage and empower leadership growth and effectiveness. Carefully map out skills and experience. Engaging in change management is favorable when performed honestly and as well-intentioned, purposeful, professional Chapter development. Determining future needs requires Board members to consider developing new recruitment strategies while continuing to grow and build existing and new relationships in the Phi Beta Delta spirit. That is, as stated in the bylaws Article 1, Section 2, Paragraph 2.1.4 of Phi Beta Delta Honor Society for International Scholars, Inc., to "connect individuals on university campuses and throughout the world involved in the international experience" (p.1). As the Chapter matures, for organizational growth to be realized, try challenging Board assumptions, be amicable toward unique perspectives on age-old topics of discussion, and see if the Board's openness to new and different ideas prompts the emergence of potential new Chapter Board leaders.

Build Relevant Experience

The third step in successfully preparing for the future through a Board Succession Plan is to build relevant experience. For change to happen, an open mind and a shared understanding of the positive impact the change will have on the organization are valuable. Authors Al-Asoufi and Akhorshaideh (2017) reported in their study on The Impact of Employee Empowerment on the Success of Organizational Change that employee empowerment has a "significant impact on organizational change" (p.87). Factors such as talent management, leadership styles, employee training, and rewards impact the success of organizational change. The results also highlighted the necessity of "providing sufficient information about the nature of the change and its positive impact to raise readiness and reduce resistance" (p. 88). Successful Boards are built on recognizing the need for change and adapting to meet this need by fostering relevant experiences and knowledge exchange for potential board members, managing change effectively, and communicating the changes to all stakeholders and members of the organization. Successful Board Successions involve leaders willing to empower others by sharing sufficient information regarding organizational changes as they occur.

Building Blocks for a Board Succession Plan

Realizing that there are three significant steps to long-term board succession effectiveness, let us examine the specific actions required for a successful board succession plan.

Established Vision

A well-designed Chapter Board Succession Plan begins with two significant actions. First, it requires an established long-term vision for the Chapter and selecting the best-qualified executive members to carry out this vision. Strategic vision is a forward-looking snapshot of the organization that delineates the Chapter's long-term goals and desires for the future. It sets the direction the chapter intends to take to achieve these aspirations and is an essential guide for

leadership decision-making and strategizing. Each Phi Beta Delta Chapter should begin by honoring the primary objectives of Phi Beta Delta, which are to “recognize achievement in international educational exchange” while catalyzing to increase the international experience, developing international networks for students, faculty, and staff, creating academic international programs, and connecting individuals on campus throughout the world.

Organizational Needs Identified

In addition to the primary objectives of the organization, each Chapter should consider identifying the unique needs, desires, and skills required of its Chapter. Consider what aptitudes, competencies, and experiences are necessary for the Executive Board and the Chapter to be successful over the next five years and spend the requisite time to align Board members and potential Board members with the Chapter’s vision.

The Creation of a Chapter Nominating Committee

Developing talent to meet the organization’s vision, mission, and goals is paramount to a successful Board Succession. After establishing and cementing the PBD organization’s vision and identifying the needs of the chapter leaders, the Chapter leaders should advance and implement a plan, which includes developing a pipeline of talents and abilities for potential Board members. Creating a Chapter Nominating Committee is a natural progression for a Board Succession Plan. The Committee should be comprised of persons impacted by the Chapter vision. This could include a Chapter Board member from prior years, a current Board member, and a person or persons who are vested in the processes and the outcomes, such as developing and supporting international scholars or students. The Nominating Committee should evaluate the immediate talent needs for the Board, such as financial and leadership expertise and global commitment, as well as upcoming vacancies on the Board, but also consider Board composition. The Chapter Nominating Committee will seek to create a balanced Board that includes a variety of known talents and expertise. It will also bring in new members to assume leadership roles to energize and rejuvenate the thinking of the Board and its vision. The roles and responsibilities of each Board position, a job description with known qualifications, should be spelled out and easily accessible for members to review and for persons holding these positions to recognize their responsibilities, needed skill sets, and the added time commitments associated with the Board position.

Embracing International-mindedness and Diversity

Diversity, equity, and inclusion are hallmarks for providing fresh new perspectives that could recharge the organization and bring in new ideas for additional future vision goals. David Weisenfeld published an article in June 2022 on Brightmine, an HR and Compliance Center online commentary and insight site, entitled DEI: 5 Key Issues Facing Employers. Weisenfeld noted that organizations risk losing talented employees from “unrepresented groups” if they do not focus on building on their diversity. The Phi Beta Delta International Society and its chapters

have the unique ability to garner interested international-oriented members simply under the international-mindedness of the institution. The academic organization is created to drive diversity by being directed to develop a global spotlight on internationally talented scholars. It provides a universal nucleus of like-minded scholars nurturing transnational and worldwide experiences and perspectives. However, it is incumbent on the organization to celebrate our differences and work to ensure efforts are made to seek out diverse points of view professionally and organizationally. An international organization such as Phi Beta Delta can look within its university membership to foster a diverse, inclusive leadership of faculty, staff, and students. It can also widen the expanse of influence, inclusion, and diversity by reaching out to distinct communities within its local communities, regionally, state-wide, national, and international geographic boundaries. The Board can consider including interested parties within its leadership ranks from businesses attracted to expanding their footprint across the region and globally. Senior leaders can encourage and promote outside public and societal involvement from neighboring profit and not-for-profit companies. The Phi Beta Delta International Honor Society is a village that promotes and supports international endeavors and welcomes fresh, innovative methods for inviting people to participate and learn about different cultures and environments. The Board membership should reflect on, invite in, and build upon these values that shape potential leaders. A strategically developed Board Succession Plan will include greeting and applauding the many different perspectives and making room for their expression in the organization's leader development and planning process. Board leadership is not an afterthought; It should be a driving thought while creating future-vision initiatives and building leadership circles. Board Succession Plans should be built with diversity and inclusion as blueprints for growing the organization's direction, Board, and membership.

Outreach

Current board members can serve the organization best by developing a plan for recruiting and training new members and making it a priority with an eye toward the organization's future needs. Forward-looking questions should be asked, such as, "What do we want our organization to look like in the future? What representative type of leaders should be promoted to a Board position to accomplish the vision and stated goals? What skill sets are required to balance and meet the needs of its membership and the international community now and over the next five years? Strategic planning for Board Succession involves an inward look at the organization of today and a positional response to its future aspirations for growth and development. Outreach should be considered an integral part of Board development and succession planning. The author suggests The Phi Beta Delta Honor Society for International Scholars is an organization that welcomes scholars from various backgrounds and seeks to ensure there is support and encouragement for members to enjoy fellowship and leadership opportunities for its members. Designing a future-vision board can facilitate the organization's efforts to achieve its vision and goals.

Term Limit Discussion

As per the protocol set for the PBD Chapter, the Nominating Committee will create the slate of proposed Executive Board members, and the Standing Board will formally approve the candidates. The newly elected officers will be presented at the Annual Board Meeting.

Another tool to assist with the Board Succession Plan is the deliberation on term limits within the Board. Consideration should be given to evaluating the need or absence of office term limits and experience for any position. For example, for continuity purposes, the PBD Eta Mu Chapter determined the Chapter Coordinator position would not be term-limited, remaining stable as chapter liaison to the Society, its Executive Office, and the Board. The position's stability helps to ensure compliance at the chapter level with Society's rules and regulations, policies, and reporting requirements. However, the President's position is term-limited to one year. The President-elect is expected to be at least an observant member of the Board President for the year before assuming the role of President. It would be an added advantage for an easier transition to the highest leadership role of the President-elect to enter into an active leadership headship in preparation for the President position to gain the knowledge, skills, and confidence associated with the leadership position. These additional activities should be determined and agreed upon in advance. A review of Executive Board job descriptions, Board composition needs, and Board term limits should be routinely scheduled to enhance the Board Succession Plan.

Leadership Role Availability

Potential board members and potential recruits for the executive board can be introduced to leadership roles by participating on several internal committees and external Chapter committees, interacting with the campus community, local leaders, and the international community. The President-elect position is an excellent example of a board-rank position that carries with it an opportunity to learn from a "mentoring" Chapter president. Mentoring helps the next-in-line officer to personally and professionally develop the skills necessary to be successful in the role of President. The Board President has the opportunity to assist the mentee in developing the essential leadership skills and social behavior attributes that lead to a more harmonious and directed governing body. A greater sense of self-confidence can be created by the president-elect, who might assume leadership roles during the stint as the president-elect while becoming more confident and assured as they prepare to move into the president position at the beginning of the new term. Another excellent opportunity for growing into the leadership position is working with the president to network and develop relationships crucial to the chapter's continued success. The President can encourage and empower the president-elect during this tenure by sharing knowledge of past activities, successes, and challenges. Being introduced to persons with whom the president interacts on a routine basis and meeting with personalities the president engages with while executing their job helps establish continuity and a more seamless transfer of power and camaraderie among internal university campus faculty, staff, and students as well as members of the stakeholder community. As the Board gains

competencies and the skills required for each position, the organization will become more attractive to its members and increase the opportunities for attracting, enlisting, and retaining top leaders within the Chapter. This mentorship posture helps to develop and secure Board leadership and expertise within the Phi Beta Delta Chapter.

Board Training Provided

The board succession strategy for developing competent Board members is to provide training programs, workshops, and “job shadowing” processes throughout the year. The onboarding process is a well-documented strategy for successful entry into any organization, for-profit or not-for-profit. Onboarding integrates a new board member into an organization by familiarizing the latest member with the vision, activities, and services provided. It is the progressive development of the newest board members to gain the knowledge and skills they need to become influential members of an organization. Having the opportunity to learn the skills needed to perform the duty of a PBD Chapter Board member will create an environment for success. Turman (2024), in an article written based on a white paper collaboratively written with nonprofit leaders of the Knowledge & Thought Leadership Committee of the Network for Nonprofit Search Consultants (NNSC), cited multiple initiatives for onboarding success, among the suggested proposals, included having effective teachers and guides. Mentoring is an example of this suggested notion. Job shadowing is a type of on-the-job training that allows a potential candidate to follow and closely observe the person performing a job or tasks for which they will be performing the same role responsibilities. This can be an effective method for developing future board members. It also allows the candidate to view the activities for which they are being groomed. Although job shadowing is a successful strategy, a more hands-on practical experience plays an important role in a positive learning experience. By allowing the prospective board member to participate actively in a board assignment, for example, the chapter leadership promotes the necessary skills for leadership.

Routine Evaluation

Steps toward a long-term Board Succession Success will include a routine evaluation of the Board’s capabilities with the Phi Beta Delta Chapter’s strategic goals in mind. Periodic reporting and planning efforts to realize the Phi Beta Delta Chapter’s vision and mission are vital to ensuring the Executive Board performs its duties effectively and successfully. This strategy also relays an important message and understanding to the membership. That is, the leadership performance of Board members is taken seriously, and the vision and mission of the Chapter are a priority of the Board and its members.

As the Chapter Board Succession Plan unfolds, the succession plan review and any Board Policy Bylaw changes should be circulated among Board members for discussion and vote. These proposed changes, supported by the membership, should reflect the strength and direction of long-term dedicated Board members. Policy changes that are well thought out at the leadership level and explored at the executive level should reflect the values and goals of the

membership and ensure that varying perspectives are reevaluated and given their just due for consideration. Buy-ins to proposed policy changes are more readily accepted within an organization when it is evident to the membership that perspectives are studied, measured, and well-thought-out before presentation to the general membership.

Establishing Networks

Establishing and maintaining robust networks and relationships with executives and stakeholders such as the Society, Chapter membership, university, and local, national, and international communities is an essential strategy for successful Chapter Boards. It is crucial to remember that Phi Beta Delta Chapters are the outreach posts and flagships for this International Honor Society. Board members and members alike represent the Phi Beta Delta Society and should consider maintaining existing members and recruiting new ones as an essential mission for the organization. Establishing a diverse pipeline of potential Board members will best position the Chapter organizations to reset for resilience when needed and thrive in the long run.

Student Scholarship Development Program

As crucial as these Board Succession Plan strategies are in securing the future life of the Phi Beta Delta Chapter organization, consider the valuable contribution of developing and implementing a Student Scholarship Program and Fund to secure the future. New blood can be the lifeline for continued success in an organization. The Phi Beta Delta Chapter organization is uniquely positioned to develop and grow further in its mission and expressed values to meet and engage the international scholars of the world. Consider exploring the avenues to growing Chapter membership by reaching out to international scholars (faculty, staff, and students) and inviting them into the inner circle of Phi Beta Delta membership via a scholarship expressly designed to reward the inquiring international mind seeking to explore an academic international study opportunity.

The PBD Chapter Scholarship Development Program is a philanthropic venture designed by the Chapter Board to raise opportunities and monies for academic and cultural exploration for students abroad and those at the Chapter university. There are a variety of ways to bring this effort to fruition. One such effort is to explore fundraising ideas, such as creating a Language and Culture Awareness Series. For these events, invite community members, university students, and faculty to register for an international experience with a guest lecturer highlighting the chosen country for exploration. The price is a small entrance fee for an evening experiencing the selected country's sights, culture, music, culinary delights, and dance. All proceeds are donated to the PBD Chapter Scholarship Program. The fund grows, scholarships are awarded, and all enjoy the experiences. The PBD Eta Mu Chapter has experienced great success with this fundraising opportunity and increased international awareness of the highlighted countries worldwide. The Language and Culture Series was a Board initiative that has proven successful in its mission. The Scholarship Program is being expanded and is reaching out to local business owners seeking to sponsor these events promoting international scholarship.

This self-perpetuating recruitment tool allows new and current members to meet the Chapter's mission goals and promote scholarship worldwide. It is also an avenue for generating new Executive Board leadership. As the Chapter explores new possibilities for expanding the program, revitalizing membership, and growing the Scholarship fund, potential members discover fresh ways to explore and learn more about the uniqueness of our cultures and countries abroad.

Conclusion

In summary, successful executive boards devise succession plans and strategies to recognize and select board members for leadership positions and implement steps to revitalize the organization's leadership and membership. Actions taken by the Succession Plan include long-term vision setting and choosing the best-qualified executive members for the Board team. Any significant changes to the Chapter organization should reflect the Chapter's vision and be reflected through the dedication of the Board members. Reviewing existing policies, procedures, and bylaws is an integral responsibility of current Board members. The Nominating Committee is essential in selecting appropriate board members by job descriptions and easily identifiable roles and responsibilities. Terms for engagement as a Board member should be determined in advance by the Board and represented in the Bylaws. A priority responsibility and step toward long-term success will include a routine evaluation of strategic goals and a robust pool of qualified candidates for integral leadership positions. Maintaining a network of connections within the organization, the university, and the community of local, national, and international scholars is paramount for Board members. Board members should be encouraged to build and support these networks to thrive long-term. As change occurs within the organization, vision and mission goals and objectives shift; it is critical for the Chapter's success to vet these changes thoroughly and implementation plans be shared with the membership to minimize resistance and bolster support and morale within the organization and the community.

Three proposed steps toward long-term Board effectiveness are: First, accurately assess the Board's current capabilities and adjust its composition to reflect a balanced Board of thought and diversity. Second, determine the chapter's future needs. Third, build relevant experience and knowledge sharing to empower others as organizational changes occur.

The development of a PBD Scholarship Program can accomplish multiple goals interchangeably. The Scholarship Program can broaden the horizons for international interest through internationally oriented events and provide funding support for students seeking to explore other countries culturally and academically. A scholarship program can also embrace the local community and engage them to support these scholastic international endeavors.

Phi Beta Delta Chapter organizations can plan executive board successions that prepare leaders for positions of great import to the organization and support the Chapter's organizational mission, vision, and goals for its current needs and future aspirations. Active management of internal and external stakeholders such as campus students, faculty and staff, alums, business, and donor groups are an integral part of the Board's responsibilities as an executive council. A

strategically mapped out course of action for Board leadership development allows the PBD Chapters to function in the present and adequately prepare for the expected and unexpected future realities.

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