SUCCESSION PLANNING

*Now more than ever there is a need for clubs to consider their futures. Where will they be in 5 or 10 years time and where will their volunteers be? Clubs must ask themselves: what if key volunteers leave? Will all their knowledge and experience go with them. Who will carry the club into the future. Who will take on the key roles to ensure that the club survives and continues to grow? How will this process of change and handover happen?*

Succession planning is about looking at where your club has come from, where it is now, where it needs to go and what your club can do to get it there. Ultimately succession planning should help you achieve the club’s objectives over the next 5, 10 or 15 years by ensuring that your club has the right volunteers with the right skills in the right positions at the right time.

It is about putting a system in place to ensure that when someone leaves (such as the chairperson, secretary, coach or manager) the club is not left with a massive black hole of knowledge and expertise and that there is someone in the wings ready to step into that role. Most volunteer turnover occurs at the end of the season or at a time around your Annual General Meeting (AGM). A succession plan is necessary to provide opportunities for potential leaders within clubs to be identified and developed in readiness to move up into leadership positions. Clubs that plan for smooth transitions of leadership positions are less likely to experience disruptions to their operations and can better position themselves to replace volunteers who vacate their current positions.

Succession planning is vital to the continuity of your club. It ensures your club can continue to be successful and provide members with what they need. While some turnover of jobs is normal, high turnover rates can be a problem.

If the workload falls to only one or two people, the quality and fortunes of the club can quickly decline when those people leave. A succession plan will ensure that if someone steps down, someone can step into their shoes and pick up where they left off. Clubs that plan for smooth transitions of leadership positions are less likely to experience disruptions to their business.

**Keys to a good succession plan**

Many of the components of a good succession plan will also help other areas of the club. These will usually cover how things are done in the club, such as:

* having job descriptions so that current volunteers know what they should be doing, and what might be expected of new volunteers
* having a business or strategic plan so that anyone who is new to a committee can find out exactly what the future priorities are
* having a policies and procedures manual so that volunteers know how everything should be done.

The second part of good succession planning is human resources. Many of the above issues relate to people, whether it is fearing change, staying around for too long, or being the ‘gatekeeper’ (see description below). Trying to avoid any of these situations is as important as trying to groom successors for certain positions. This ensures that when the time for a changeover comes, it can be managed with a minimum of disruption and fuss. The ideal succession plan will allow existing volunteers to walk away without being missed.

**Barriers to Succession Planning**

There are some barriers to succession planning that your club might face. There may be some committee members or volunteers who are behaving in a certain way, or the committee may have processes that will not make succession planning easy.

Some common hurdles that might prevent effective succession planning are:

* **The gatekeeper** — a person on the committee who has probably been around for a while who holds all the knowledge and runs a system only they understand.
* **The irreplaceable person** — a member who believes they are irreplaceable and the committee will not function without them. This person usually has been on the committee for years.
* **Poor record keeping** — if important information, such as financial data or minutes of meetings, is not documented and made accessible, it is only retained in the memories of those involved in the process. Once these people leave, so does the information.
* **Seniors take all** — clubs that believe that those around the longest deserve the best positions will always have trouble with succession planning. Positions should be awarded to those best able to do the job, including newer or junior members if they have the required skills.
* **The longtime committee member** — a member who has reached their ‘use by date’.
* **Fear of change** — if the committee is fearful of change, there will be a reluctance to have a succession plan in place.

**Succession Planning Process – 5 Key Steps**

1. Examine your club’s position (current needs, critical roles and expected vacancies)

To commence succession planning it is vital for you to understand exactly why your club needs a plan for the future and what you hope to get out of it. This involves clarifying your club’s current position to identify its needs for the future. There are three stages to this first step:

1. *Identify your club’s current and future needs*

Consider your club in its current form. Think about the following three areas: club management, club activity and club people. Thinking about this helps you to understand your club’s current position and why you are beginning to make a plan for succession.

1. *Identify critical roles within your club*

Once you have identified your club’s current position and needs it is essential to identify the key roles within the club that will serve to address these needs now and into the future. That is, what do you see as the vital roles to your club’s success in the future?

1. *What vacancies are expected in these positions?*

Once you have established the critical positions within the club you need to assess (to the best of your ability) the risk of turnover in these positions in the near future. Who is retiring? Who is moving away? Who has been in a role too long and is sick of it? Make a list and rank the expected departure/vacancy of key positions as either ‘immediate, ‘short term’ (in next 12 months to 2 years) or ‘long term’ (in two years’ time of beyond). The more you know about the timing of handover the more prepared you can be to ensure the transition is as smooth as possible.

1. Identify skills required to fill critical roles in your club

The second step in succession planning is to break down the roles, responsibilities and required knowledge for the critical roles you identified in Step 1. It is recommended to begin with the roles you marked as ‘immediate’ expected vacancy, then move on to ‘short term’ and finally ‘long term’.

You need to devise a role description, in cooperation with the current volunteer in those roles, for each critical role. Record what skills and experience are required for key positions which will help the club in the future. If a role description exists, it provides a level of continuity in that role as the new volunteer continues in the position knowing exactly what is required of them and what the position is all about. Secondly a position description outlines exactly what you are looking for when you start to recruit volunteers to fill the position. It is important to revisit these descriptions regularly and make appropriate updates.

1. Assess the skills gap in your club and identify potential successors

You should now have a good idea what positions you see as vital for the future success of your club and what skills and expertise are required to fill these positions. Now it is essential to identify whether your current volunteers possess the skills and expertise or whether skill gaps exist; in which case you will need to train and develop certain club volunteers to allow them to step into the role or alternatively recruit new volunteers with the appropriate expertise. Whether new or existing volunteers you club must begin to identify individuals who could step into the roles when current volunteers leave.

1. *Assess existing volunteers’ skills*

The first step is figuring out what skills, experience or relevant qualities existing volunteers might have. Think about your current volunteers. Even though you may not have considered someone a good fit for the Treasurer role because they have always been involved on the coaching side of things, perhaps they run a small business and would have great skills to manage the club’s financial needs. You need to identify the expertise and valuable qualities of your existing volunteers in case this fits well with one of your critical roles outlined in step 1.

1. *Identify Potential Successors*

Refer to the role descriptions you created in Step 2. Try to match the skills, characteristics and expertise of volunteers or members of your club with those outlined in these descriptions of your club’s critical roles.

Once you have identified which volunteers match up with which positions it is also necessary to think about the following:

* Who has done good work in the past?
* Who has the qualities that fit well within our club?
* Who is a fast learner and easily adaptable to change?
* Who do you see as the leaders of the future in your club?
* How can we create a diverse volunteer base?
* Which volunteers have received positive feedback in the past?

These questions will help you distinguish between two potential successors with the same skill level or perhaps justify the placement of a volunteer who may not currently have the skills but demonstrates the potential to learn the skills quickly.

Now you should have an idea of whether you can fill the critical roles with existing club members or if need to recruit new volunteers to fill gaps.

1. *External Recruitment of Potential Successors*

Good recruitment practice is a vital aspect of effective succession planning. Firstly the club needs to actually find potential volunteers. Consider the following:

* Where could we find people in our community who possess the relevant skills?
* Where do the best volunteers come from? How can we reach them?
* Are there people who have said ‘no’ to volunteering in the past because they were too busy but may be available now?
* What kind of volunteers will we need in the next 5-10 years?
* Are there promising young people whom we could engage?
* Are we searching broadly enough or are we being too exclusive?
* Can we be more inclusive?
* Should we be implementing fixed terms for key positions and a limit to successive terms to avoid burnout and safeguard the club against poor volunteers being in positions for long periods?

Secondly once you have identified avenues of recruitment, or individuals you would like to engage, it is a good idea to set out a screening process to make sure the people you are recruiting are right for your club. Some clubs will put a recruitment committee in place to recruit, screen and induct volunteers so it is not one person completely responsible and this can also avoid the issue of personal friendships and relationships influencing decisions. It is then essential to induct new volunteers to make sure they understand exactly how their role fits within the ‘big picture’ of the club.

1. *Develop and prepare potential successors*

Sometimes your club may find the perfect volunteers with exactly the right skills to fill your critical positions, chances are though that most people will not possess all the skills or all the knowledge required of them. As a result it is crucial to continually invest in the development of your volunteers and take time to prepare them for roles in the future. By doing this, your club will be creating a greater depth of capability in your volunteer base, making it much easier ti find suitable successors in the future. Sometimes providing training and development can be expensive and each club will need to decide what limitations they have. However before you decide you cannot afford it or you do not have the time, think about the outcome of having highly qualified volunteers for your club. You must try everything to get the best out of your people and to educate them so they can contribute to club success in the long term.

Training and development can be particularly important for potential successors to ensure they have the required expertise for when these positions become vacant. Mentoring can be very beneficial for this particular group.

1. *Evaluate your succession plan*

The final step in developing a succession plan is to evaluate and review how it has worked and what (if any) adjustments need to be made. Evaluation of your club’s succession plan needs to be ongoing. It is about constantly monitoring movements within your club and making sure that you are prepared for what has to come. A succession plan is not something that you complete and then don’t look at for a few years. It should be reviewed and evaluated on an ongoing basis to make sure it is keeping up with the changes within your club.

There are two aspects of evaluation; reviewing how the plan itself is working and reviewing movements or changes within your club that could influence the plan.

First and foremost it is vital that you know whether the plan itself is actually having a positive impact on your club. In order to gauge this your succession planning needs to be measurable and have clear indicators that measure the effectiveness and success of your plan. Someone needs to be accountable for the performance of the plan (e.g. chairperson or executive) and this will ensure a better level of commitment from them and encourage them to invest time and energy into making the plan effective.

Your club should choose measurable indicators that reflect your main priorities for the plan. Some may be measured purely with numbers but other indicators might require you to use surveys, informal chats or conduct interviews with volunteers. Some indicators could be:

* Volunteer turnover (how frequently your volunteers come and go)
* The number of existing volunteers who have stepped into new roles when they have become vacant and the number you had to recruit
* The time it has taken to fill vacant positions
* Feedback (from members, volunteers, committees, new recruits)
* Retention rates of volunteers (how long are they staying in your club?)
* Volunteer satisfaction (are they bored or overworked?)
* Reasons given for volunteer departure
* The nature of role transitions (smooth takeovers?)

There are other indicators that you can use to measure the success of your plan but it is essential that you decide at the start what these indicators will be to ensure you can record as much information as possible as you go along. Again this should not be too difficult and it should not add a whole new workload to already busy volunteers.

Secondly evaluation is about keeping your finger on the pulse. This is by constantly reviewing how things are going and taking notice of movements within your club, you can better predict what is likely to happen in the near future and prepare for it. The evaluation process is a crucial step to ensuring future growth of your club.