



## Succession planning

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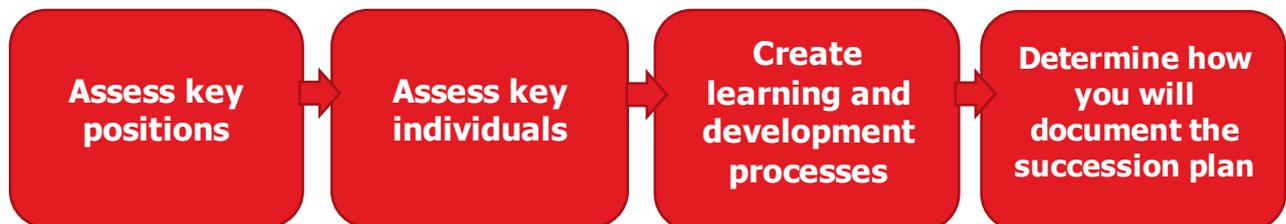
Succession planning is planning for when a person who currently holds a key position or important skills, moves on or is no longer available.

Succession planning is also about retaining current volunteers as well as engaging new volunteers and sharing skills and corporate knowledge.

Be proactive around succession planning, you never know what is ahead.

Identify what roles can have a succession plan in place, and ones that cannot.

Include your volunteers in this succession planning conversation, and reduce the fear around being replaced – succession planning isn't about this.



When following the best practice volunteer management framework:

- Be proactive around succession planning.
- Begin the volunteer journey with the end in mind.





## Tips and ideas from the sector

- Be proactive in finding the right person for the role.
- Time well spent in your succession planning at the beginning will pay off in the end.
- Have an up-to-date position description for the role.
- Be flexible in your review of the role and volunteer requirements. Leave room for the new volunteer to bring their sense of identity to the role (as appropriate). Look at ways to make this more accessible.
- Find ways to involve the outgoing volunteer in the succession planning process where appropriate. Some people can end up feeling trapped when they are not able to see a replacement.
- Ensure processes for the role are recorded, including passwords for computer programs, subscriptions, social media accounts, etc.
- Regular knowledge sharing helps with succession planning. Find ways for team members to share what tasks or projects they are currently working on. i.e., during regular team meetings, through toolkits/manuals, task lists, procedures, policies, sharing contacts and knowledge. Look at ways to incentivise this.
- Encourage the volunteer to create informal videos i.e., YouTube how-to clips, instructional videos, snapshots of how work is undertaken, steps involved, infographics, etc.
- Ensure saving of resources and documents to organisational systems and files, not to individual computers. Encourage consistent file naming conventions for ease of finding information.
- Job sharing, work shadowing and having others fulfill the role in an acting capacity during leave period etc. can be successful succession planning activities.
- For committees, assistant committee roles provide a clear succession planning pathway.