

Succession planning refers to the comprehensive strategies and procedures organisations put in place to ensure continuity in both operations and leadership. It's more than just identifying future committee members; it's about implementing processes that minimise disruptions during transitions. This includes strategies for identifying and recruiting potential committee members, creating robust onboarding and handover protocols and establishing methods for upskilling and training, such as mentoring, shadowing, professional development and formal training programs.

Organisations should view succession planning as an ongoing process, beginning these efforts at the start of committee members' terms rather than just as their tenure concludes. Yet, many organisations still neglect this practice, missing the opportunities that a well-structured succession plan can offer in simplifying committee changeovers.

## Good succession planning

**Ensures continuity of leadership:** By identifying potential committee members in advance, you can ensure that the committee's work continues with minimal interruption when their term is over.

**Maintains institutional knowledge:** Organisations should have long-term goals and these require continuity of leadership. A succession plan ensures that the knowledge and experience gained by current committee members are transferred to incoming committees.

**Facilitates transition of decision-making authority:** Succession planning can help prevent disruptions and potential conflicts that may arise during changes of leadership.

**Streamlines handover of administrative tools and accounts:** An effective succession plan ensures a smooth transition of digital assets, databases, software and other administrative tools. This includes setting protocols for transferring account credentials and permissions, safeguarding continuity in the organisation's operations and protecting against potential security vulnerabilities.

## Tips for developing a succession plan

Succession planning involves more than just preparing for the departure of current committee members. It should begin when you start your role as a committee member. Waiting until a committee member is ready to leave before identifying a replacement can result in a rushed or ineffective transition. Early succession planning helps to create a culture of leadership development and encourages ongoing learning and growth. Potential successors can be identified, a plan can be developed for continuity of leadership and a pipeline of future leaders can be created.

## To create an effective succession plan:

**1. Identify key positions:** The first step in succession planning is to identify the positions that will need to be filled. These positions are those that are critical to the organisation's success and have a significant impact on its overall direction. Typically this would include all committee members, key operational positions (e.g. head coach) and any staff.

**2. Develop the succession plan:** A succession plan can be very simple. It should outline the steps necessary to identify, train and transition new committee members into key positions. It can include:

**a. A timeline of terms** – A timeline for when current committee members will reach the end of their terms in office and new committee members will be required.

**b. Position descriptions** – including the specific responsibilities and typical activities of each position.

Position descriptions will help you identify people with the relevant skills and they can help potential new committee members understand what their role would include.

**c. Steps needed to identify suitable successors.**

It's important to personally and actively engage with your members – meeting other members and parents is the best way to find people with the skills and experience to take on a committee position.

**d. Handover process** – Include a handover process to ensure a smooth transition. The handover process can include a policy for mentoring after leaving a role and training prior to taking on a role.

The handover is an opportunity to talk about your personal interpretation of the role along with what is expected, and the culture and objectives of the organisation.

**e. Professional development opportunities** – Strategies for developing the skills and knowledge of future leaders to prepare them for leadership roles.

**f. A process for reviewing and updating** the succession plan.

# Succession planning

Keep an up-to-date list of relevant processes and documents and clearly identify where they are saved so new committee members have access to everything they need for their role. See the Handover Checklist on the following page for an example of what may need to be shared.

**3. Build a pipeline of potential leaders:** To ensure that there are qualified candidates available to take over key positions, build a pipeline of potential leaders. This can be done through informal mentorship programs, leadership training, or by current committee members identifying potential successors and encouraging them to nominate for elections.

**4. Communicate** the succession plan to members to ensure that the right people are aware of the plan and understand their role in making it a success.

Succession planning is a great way to smooth out the bumps of committee change overs. Keep it simple so it's easy to follow as you identify and develop future organisation leaders.

Directly asking someone to consider a leadership role in your organisation is a great way to inspire the right people to nominate. Asking early gives them a chance to start to prepare for the role.

## Handover Checklist

A handover checklist can help ensure a smooth transition between outgoing and incoming committee members. It helps to maintain continuity and efficiency in the organisation's operations. Here are some key elements that should be included in your committee handover checklist:

Constitution, bylaws and any policies and procedures (e.g. Codes of Conduct)

Financial records

Bank accounts (including transferring signatories)

Insurance (e.g. public liability, building and contents, volunteer workers insurance)

Lease and any other tenure instruments

Licence details (e.g. liquor, gaming, food handling)

Legal contracts or agreements

Safety and statutory inspection details (e.g. fire, electrical, asbestos, gas, plumbing)

Maintenance obligations and maintenance schedule

Property and inventory

Strategic plan

Document templates

Previous meeting agenda, minutes and schedule

Member list

Calendar of events

Important dates (e.g. affiliation, purchasing)

What worked well and what should change

Important contact details (e.g. sponsors, suppliers, Council)

Login credentials or admin access and payment/renewal details for:

- Website
- Email
- Social media accounts
- Cloud file storage
- Other subscriptions and software (e.g. payment gateways, financial software, membership management system, competition management software, survey software, design software)

Update all passwords and remove access for non-current volunteers and staff

Details of external relationships (e.g. local elected representatives, peak bodies, Council and government officers, sponsors, suppliers, venues)

Details of regular activities required under each role

Details of ongoing support available to incoming volunteers

Update contact details and user accounts for grant portals

Update contact details with governing bodies and government agencies