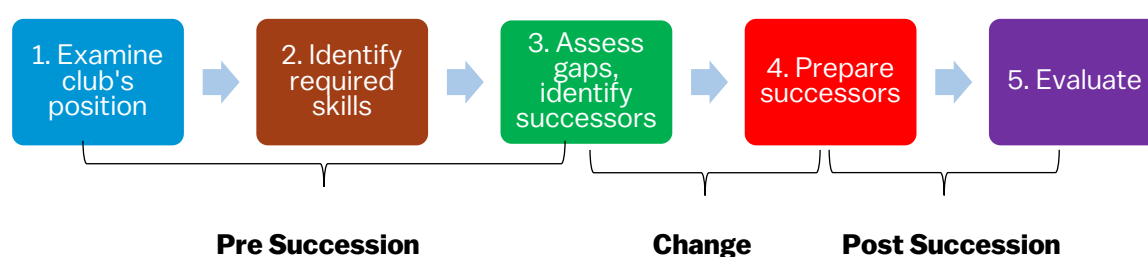


Succession Planning Process

Succession planning is a proactive and long-term plan involving the process of identifying and developing individuals with the potential to fill key leadership positions when existing volunteers leave the position. It ensures a club will continue to operate efficiently without the presence of people who were previously holding key positions.

Succession planning has added importance for university sport clubs, given that numerous leadership positions are held by students, who only have a finite amount of time within the institution. For many clubs, succession planning occurs on an annual basis.

There are a series of steps a club should take in the succession planning process:



Step One: Examine the club's position

- Identify critical roles
- Identify when roles will become vacant
- Consider splitting roles or redistributing tasks

The club should start with identifying current critical roles within the club, who (if anyone) is in the role and when the role may become vacant. The club should also refer to the strategic plan and the club constitution to determine if any additional roles need to be added to the club structure.

In developing the list of tasks associated with a particular position, identify opportunities to reduce the demands by splitting roles or redistributing tasks to general volunteers or working groups.

As an example, roles could be split as listed below.

Executive Committee	Other committee members	Operational roles (don't need to be on the committee)
Strategy	Grant applications	Event set up
Meetings	Event planning	Event clean up
Constitution review	Marketing	Cooking the BBQ
Risk management	Meeting new members	Working at the bar / canteen
Asset management	Complaints handling	
Budgeting	Merchandise	
	Stock control	
	Social media management	

Step Two: Identify skills required to fill critical roles

Next, identify what each critical role is for and what is needed to be successful in the role.

Answering the following questions will help in this step:

- What are the main objectives of this role?
- What skills are needed to do this role?
- What training and education options are available for the role?

This information can be used to develop or review the job descriptions for each of the positions. Position descriptions are crucial to effective succession planning and volunteer management.

The UniSport Club Toolkit has a range of position description templates that your club can adapt and use as their own, including the following:

[President](#)

[Treasurer](#)

[Member Protection Integrity Officer](#)

[Vice President](#)

[Sponsorship Manager](#)

[Welcome Officer](#)

[Secretary](#)

[Communications Manager](#)

[Committee Member](#)

Step Three: Assess the skills gap in your club and identify potential successors

- Compare skills required with skills of current committee
- Identify successors as early as possible
- Ensure committee member strengths complement one another
- Consider a range of options when recruiting
- Sell the merits to prospects
- Provide position descriptions to prospects

Identify vacancies and potential vacancies in the short term and identify potential successors for the role. Compare the skills required for the role with the skills of current volunteers, to identify any potential internal successors. The club may need to look externally for new successors.

Identify successors as early as possible

Recruitment discussions should start as early as a year before positions open, because good people are usually busy and often don't want to commit immediately (or can't). Good or bad, the recruitment process is going to take time and the successful candidate may need several months' notice.

Ensure committee member strengths complement one another

When building a leadership team, it's important to weigh the strengths of each potential team member and ensure that they complement, rather than replicate, each other, as well as your own. Consider not only personality and leadership style but also diversity in graduation year, gender, age, course of study, and experience.

Consider a range of options when recruiting

When recruiting for leadership roles, where possible, you can consider the following:

- Having current leaders responsible for selecting their successor
- Looking outside your club for leaders
- Having alumni as committee members
- Look at appointing those who are already volunteering in another role

You could consider having each current leader responsible for selecting a successor for their own position. In order to avoid bias, all successor selections should be approved by the executive committee.

Consider looking outside your club for leaders. Reach and out find people you believe will push the club forward. By doing this, you bring in more people to the club itself and you even bring people who may not think they could be a leader. When picking a successor to lead your club, you do not necessarily have to pick someone you believe will finish the job you started. Consider choosing a leader who is different from you, in doing this, you ensure that new ideas are coming into the club.

If your club is permitted to, you could consider alumni to take on a position on the committee, particularly those who have previously been a part of the club. They already have knowledge of the club and may have since developed their skills to be able to assist in a leadership capacity on the committee.

For Executive Committee roles, consider those people who are already assisting as volunteers in other ways. Do they potentially have the skill set and ability to step up and take on a leadership position?

When recruiting for potential committee members, you may want to have one person responsible for making the approach to those identified individuals. If your club elects to do this, the person making the approach should be someone who is enthusiastic about their role, is positive about volunteering and can sell the merits of involvement.

Sell the merits to prospects

There are a range of potential benefits to those who volunteer on the committee, including feeling happier and healthier, having a sense of meaning and belonging, making new friends, learning new skills, being a pivotal part of the club, networking, adding it to the CV and an opportunity to support the development of the club. Make sure prospects are sold on these benefits, rather than only seeing it as extra work to take on.

Provide position descriptions to prospects

Provide potential volunteers with a realistic preview of what the job entails – volunteers need to understand the size and nature of the task ahead of them before deciding to commit their time and energy to a position.

If possible, provide a job description including meeting times, major tasks, average weekly or monthly time commitments, benefits and conditions. This will help potential volunteers make an informed decision about whether a job might suit their skills, experience and availability. Links to a range of position description templates are provided in Step Two of this document.

More Information

The Australian Sports Commission's 'Game Plan' succession planning framework may be of assistance when undertaking steps two and three.

The framework template provides a table to help identify your current committee's skills, which will help to identify existing gaps and key skills required of the successful candidate.

[Click here](#) to access the framework template.

Step Four: Develop and prepare potential successors

Once you've confirmed a successor, to help ensure a smooth transition, training and education are recommended to prepare them for their new role. Create a training and development plan outlining the training, coaching, mentoring or work experience activities that a successor will engage in over a certain period of time.

- Have an induction process
- Provide support and mentoring
- Provide relevant documentation for knowledge sharing
- Provide training

Induction

New appointees need documentation, mentoring, and feedback. These should be standard elements of the recruitment process at all levels. Prepare a well-organised folder of materials to give background, context and overall positioning of the organisation.

Mentoring

If possible, consider having the outgoing President serve as co-President, alongside the incoming President, to mentor and transfer knowledge for a period to ensure a strong start.

Documentation

One of the biggest problems facing university sport clubs is ensuring that the loss of one key committee member doesn't mean the loss of all the organisational and operational knowledge they held. The best way to ensure that doesn't happen is to document as much information as possible.

The following handover checklist provides a list of the types of information that should be provided to new executive committee members.

- Constitution
- Financial records
- Bank accounts (including transferring signatories)
- Club property and inventory
- Club document templates
- Previous meeting minutes
- Member list
- Calendar of events
- Important dates (e.g. re-affiliation)
- What worked well and what should change
- Important contact details
- Login credentials or admin access and payment/renewal details for:
 - Website
 - Email
 - Social media accounts
 - Cloud file storage
 - Other subscriptions and software (e.g. Mail Chimp, Canva, payment gateways, financial software)
- Update all passwords and remove access
- Details of external relationships (e.g. sponsors, suppliers, venues)
- Details of regular activities required under each role

A good way to provide this type of information is online, for example as a shared Google Drive, that the entire committee can access.

Training

The next element is the training period. Although it is cited to be the most important element during a corporate succession process, the training period is often overlooked by student clubs. The training period provides time to assess the elected leader's weaknesses and allows a mentor to coach them to a point where they feel comfortable stepping into their new role.

Without a training period, a new leader will probably be overwhelmed trying to figure out how to perform their duties. Most still neglect to have a set training period because often times the "outgoing leadership is not dedicated to training the next leader because they have gone abroad or graduated".

Step Five: Evaluate the succession planning process

Like any plan, the succession plan should be reviewed and evaluated regularly to ensure it is effective and relevant.

The information collected during this period can help a club decide what to change the next time the process is repeated.

- Evaluate the process
- Evaluate the successor's performance
- Review and revise your plan

Evaluate the process

To evaluate the succession planning process, consider questions such as:

- Were critical roles able to be filled?
- Were non-executive roles able to be filled by other people?
- Was enough time allowed to undertake the successor appointment process?
- Were the right people involved in the process?

Evaluate the successor's performance

To evaluate the performance of the successor, consider questions such as:

- How has the successor performed in the roles they've been allocated?
- How has the successor integrated with the other committee members?
- Was the successor provided with enough information, training, support and feedback to perform their role?
- Was the right person chosen for the role?

Review and revise your plan

Based on the information collected during the review, adjust your plans for when undertaking the succession planning process the next time.

References

CPR Group	Volunteering CPR Group Workshop
Our Community	Nothing Succeeds Like Succession: Succession planning for not-for-profits
University Innovation	How to create a strong succession plan for your student initiative - University Innovation Fellows
Harvard Alumni Association	Clubs & Shared Interest Groups Leadership Planning & Succession Toolkit.pdf (harvard.edu)
University of South Carolina	Senior Theses - Student Organization Succession Planning
Michigan Ross Alumni Club Resources	Succession Planning
Sport Australia	Recruiting Volunteers Fact Sheet
Club Help	Hints for succession planning
The University of Sydney	7 Surprising Benefits of Volunteering

