

Easy stages guide to Succession Planning

What is succession planning?

It is best described as a process where one or more "successors" are identified for key jobs, and development activities are planned for these successors. Successors may be fairly ready to do the job (short-term successors) or seen as having longer-term potential (long-term successors).

Why have a succession plan?

The main objectives and advantages of succession planning are:

- Improved filling of key positions through a broader proactive candidate search
- Active development of longer-term successors by making sure they get the range of experiences they need for the future role
- Encouraging a culture of 'progression' through developing members who want to share their skills, experiences and values for the future of the club and organisation

It is the active development of a strong 'talent pool' for the future which is often viewed as the most important. Increasingly, this is also seen as vital to the attraction and retention of members in a service organisation.

How are succession and development plans produced?

- Identifying possible successors
- Challenging and reviewing succession plans through discussion of people and posts
- Agreeing job (or job group) successors and development plans for individuals
- Review

What resources are available?

- The 5-year planning tool on the next page will help to identify when roles will become vacant
- The job descriptions can be found on the SIGBI website [Club Governance-Role Specifications for Club Posts](#)
- Days of Reflection can be used to discuss succession planning and identify those with aspirations to take office. See the easy stages guide on the website

How might you go about it?

At the start of each year, the Club Executive might arrange a meeting to review results from the previous year's succession planning efforts and to plan for the present year's process.

The Club Executive will circulate to members the roles and when they will become vacant with a request for expressions of interest from the membership.

The Club Executive will review the results to analyse how successful the club has been in attracting members into positions and to pinpoint individual development needs.

The results of the analysis will be reviewed, appointments made and development plans agreed.

Development plans are put into action.

Throughout the year, the Club Executive will review progress in developing identified successors.

How you might encourage and enable members to take office?

Advisory Capacity: All members have skills. The person with accountancy qualifications does not always want to be the Treasurer but they might consider an advisory capacity supporting the club member who is the Treasurer?

Shadowing: We already use this system for the President's role with the Vice President and President Elect shadowing her. Could this idea be transferred to other roles in the club? A development opportunity may be to shadow the current officer and learn from them and when they finish in post they can support the 'new person to role' as required.

Job Sharing: This can simply be organised by 2 or 3 members taking on the role and sharing the tasks between them.

Trying out tasks: One club did not have a President so club members took it in turns each month – this really gave the opportunity for members to see what was expected.

How you might encourage and enable members to take office? (Continued)

All taking a role: If all club members are responsible for a small task, then they have ownership of the club and the load is spread and you don't find just a few members doing everything.

Training: Several Regions, National Associations and Networks have regular training, as part of their meetings for officers coming into post. Other Regions, National Associations and Networks respond when members ask for training. Many Regions, National Associations and Networks have peer group meetings, usually as part of the meeting (before or after) to bring together all Club Secretaries, Treasurers etc to share issues, experience and good practice. Federation also provides training modules for use in workshops. Do you have simple, short written descriptions of each role so that, "wheels do not need to be reinvented."

Club Expectations/sharing the load/allowing for change: Is your club creative/ open to discussion/change in what is expected of each member when they take office. A new, younger member who was very enthusiastic and kept asking – "Why are you doing it like that?". The club members thought about it and asked themselves 'why'? It turned out many of the things they were doing were just 'how they had always done it'. The club talked and changed their practice and now it is a far more stimulating club, taking programme action as the focus for the meetings. The new member feels valued.

New roles: The Club can be creative in thinking about roles. In one Club, a member, who had not attended recently due to illness, felt very supported by Club members and offered, when she was able to attend again, to be the pastoral co-ordinator. She now keeps in touch with members who are not able, for whatever reason, short or longer term, to attend meetings.

Remember

- Recycle to give breathing space
- Encourage members to see the wider picture of Region and Federation at conferences.
- Ensure an open and welcoming atmosphere and culture in the club: all ideas welcome from all members, respected and used
- Be aware of members' circumstances
- Ensure there is time for food, fun and friendship

Five Year Successional Planning Grid

	Year 1	Year 2	Year 3	Year 4	Year 5
President					
President Elect					
Vice President					
Immediate Past President					
Programme Action Officer					
Treasurer					
Secretary					
Executive Members					
Development Officer					
Communications Officer					
Website Officer					