Succession Plan Template:

**(*Insert club name)***

**Succession Plan**

(***Insert year period e.g. 2018 – 2023*)**

**This plan was created on:** (*insert date that the plan was originally created)*

**The plan was last updated on:** *(insert date)*

**The main objective of this plan is:** (*insert the main purpose of the succession plan for your club).­­­­­­­­­­­­­­­­­­­­*­­­­­­­­­

**The execution of this plan is the responsibility of:** *(insert position or body responsible).*

**This plan will next be reviewed on:** (*insert date)*

**The Club’s Position:**

When completing the below, consider the following:

**Club Management:**

* Does your board work well as it is? Has it achieved success and does this have a positive impact on the rest of the club? If not, what is it about the current structure that doesn’t work?
* Do you have enough board members? Do they have the right skills and expertise? Are there skills or expertise missing? How would you like the board to look in 5 years’ time?
* What is the makeup of your board? Do you have women, young people and/or culturally diverse voices being heard? Does your board reflect your membership base?
* Are there clear lines of communication between club members, volunteers, subcommittees and the board?
* What is the board turnover like? Have board/committee members been there for a long time? Is it too long? Or do people come and go too quickly? Consider the reasons for this pattern.
* Are any board members planning on retiring soon? What will this mean for the club?
* How would you like the club board and committees to look in 5-10 years’ time?

**Club Activities:**

* What does your club do really well?
* How many members do you currently have?
* Do your members have access to good development or coaching?
* Do your trainings happen regularly enough?
* Do you have the appropriate venue for your service deliver/training/events?
* Does your club have access to enough resources (money, transport, uniform, equipment etc.)? Or do you need to access better/more resources?
* Is your club thriving?
* What changes do you want to see to the service, competitions, venues or members in the next 5-10 years?

**Club Members:**

* Do you have enough members to make your club viable? Are member rates satisfactory or are you looking for new members?
* Do you have enough staff or volunteers or do you need more?
* Do your staff/volunteers have the right skills and experience?
* Are your members happy with the club? Why/why not?
* Does your club have a positive club culture?
* What skills/expertise might you have access to through your members or volunteers that you are not making the most of?
* How long do most volunteers stay in the club?
* Do you have trouble attracting members or volunteers or is your recruitment process working well?
* Do you have trouble retaining your members and/or volunteers or do they often stay in the club for the long term?
* Do you currently provide support to your volunteers and invest in their development through offering training, accreditation opportunities etc?
* What might happen in the next 5-10 years that will have an impact on your volunteer or membership base (e.g. members going away to university, volunteers retiring, registration fees going up, new businesses moving into town that could create a wider pool of potential athletes or volunteers)?

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| --- | --- | --- |
| **What the club does well** | | |
| **Club Management** | **Club Activities** | **Club Members** |
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| **What we need to do differently or better** | | |
| **Club Management** | **Club Activities** | **Club Members** |
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| **What changes need to be made in the next 5 – 10 years** | | |
| **Club Management** | **Club Activities** | **Club Members** |
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**Critical Positions in the Club**

Roles that are critical to the things we do well:

Roles that are critical to address the things we need to do better/differently:

Roles that are critical to contributing to change in the next 5-10 years:

Other roles that our club cannot do without:

**Expected Vacancies in Critical Roles:**

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| --- | --- | --- |
| **Time Frame** | **Role** | **Expected date of vacancy** |
| Immediate (within 3 months) | **1.** |  |
| **2.** |  |
| **3.** |  |
| Short Term (within 12 months to 2 years) | **1.** |  |
| **2.** |  |
| **3.** |  |
| Long Term (in 2 years or beyond) | **1.** |  |
| **2.** |  |
| **3.** |  |

**Knowledge required to fill critical roles**

Role descriptions of critical roles within the club are important as they identify the key roles and responsibilities for members who take on these roles, as well as identifying what skill sets are required by the club to fill these roles. Furthermore, role descriptions outline what knowledge and personal qualities are required to successfully carry out the key volunteer positions within the club as well as the key responsibilities and accountabilities for each position*.*

*Refer to Resources for a list of key Role Descriptions*

**Proposed successors for critical roles**

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| **Urgency** | **Position** | **Internal Successor** | **External recruitment required?** |
| **Immediate** |  |  |  |
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| **Short Term** |  |  |  |
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| **Long Term** |  |  |  |
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**Recruitment of successors**

The key person/role/body responsible for recruiting successors is:

They will be responsible for reporting progress to:

The club aims to have the following positions filled within the following time frame:

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| --- | --- | --- |
| **Position** | **Time Frame** | **Deadline** |
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The club will particularly focus on recruiting people with the relevant skills, qualities or required knowledge in order to ensure good quality candidates are filling critical roles over the next 5-10 years. (*You might also like to outline here if you plan to achieve a diverse volunteer base and how you might do this).* Strategies for achieving this are outlined below.

**Partnerships**

In order to recruit these successors the club will form partnerships with the following organisations:

1. (*e.g. local swimming school*)

**Promotion**

The following promotional opportunities will be exploited in order to promote volunteering in our club:

1. (*e.g. club open day*)

**Communication**

The following communication tools will be employed in the recruitment process:

1. *(e.g. Facebook*)
2. (*e.g. Pamphlet drop*)
3. (*e.g. school Newsletters*)

**Incentives**

We will offer people the following incentives for volunteering with our club:

1. (*e.g. exemption from club fees)*
2. (*e.g. access to training*)

**Volunteering Screening**

To ensure successors are well suited to the role and the club, potential successors will be screened. The screening process will involve the following steps:

1. (*e.g. informal interview*)
2. (*e.g. referee check*)
3. (*e.g. police vetting check)*

Following this screening process a recommendation to the Board will be made.

**Volunteer Induction**

All new volunteers will then be comprehensively inducted into the organisation.

**Resources**

The following resources will be allocated to assist with the recruitment and ongoing support of successors:

Financial (*what money can be spent on advertising, events or providing incentives etc.)*:

Facilities/assets (*what existing club facilities or assets could be used for recruitment or club promotion etc.)*:

Human resources (*who will be responsible for this process and who will support successor’s development*):

**Review**

We will review this recruitment process by measuring the following indicators:

* *(e.g. how long it takes to find a replacement for critical role)*
* (*e.g. how well the new volunteer performs in the role)*

**Development of Successors**

The club will provide ongoing training and development opportunities to successors to ensure that they are constantly improving their skills and knowledge in preparation to take on future roles within the club. This involves providing volunteers with broad experience of club activities and targeting training opportunities where necessary. The club will employ the following training and development techniques for volunteers:

1. (*e.g. a mentor program)*
2. (e.g. *regular coaching accreditation courses)*
3. (*e.g. formal training courses)*
4. *(e.g. job rotation*)
5. *(e.g. governance workshop or development)*

Training and development techniques will be applied according to the specific needs of individual volunteers. Individual development plans for each identified successor are outlined in the below table. These will be reviewed at the end of each season by (*insert the position/person/committee responsible)* and reported to the club board.

**Successor development plan**

| **Successor Name** | **Current Position** | **Future Position** | **Skills/Knowledge to be Developed** | **Time Frame** | **Training/Development Required** | **Deadline for Delivery** | **Mentor/Person Responsible** |
| --- | --- | --- | --- | --- | --- | --- | --- |
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**Evaluation of the Succession Plan:**

Evaluation of this plan will be ongoing. The club will consistently monitor changes within the community and club that may have an impact on volunteers now and in the future. Adjustments will be made as required in anticipation of, or in response to changes within the club and community.

**Performance Indicators**

Ongoing evaluation of this succession plan will be the responsibility of the Board. In order to measure the plan’s success the following indicators will be used:

* *E.g. Volunteer turnover*
* *e.g. time take to fill vacant positions*
* *e.g. volunteer feedback*
* *etc.*

**Measurement Tools**

This information will be collected by the following methods:

* *e.g. surveys*
* *e.g. informal conversations*
* *e.g. number of volunteer registrations*
* *e.g. minutes of meetings*
* *etc.*

The below table outlines when this information will be collected:

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| --- | --- |
| **How we will measure how well the plan is working** | **How frequently we will do this** |
| e.g. survey | e.g. at the end of each season or when a volunteer leaves the club |
| e.g. number of volunteer registrations | e.g. once a year at the beginning of each season |
|  |  |

**Monitoring Club Movements**

In addition to the performance indicators, the board members are encouraged to take time to monitor the movements of volunteers, developments in the community and changes in the club which impact on the succession planning process. The club will gather and record this information by carrying out the following:

* (*e.g. the succession plan will stand as a regular agenda item at board meeting so that board members can discuss volunteer developments and/or other factors that influence club succession planning)*