



# Succession Planning: Planning for the future of your volunteering team

# Summary

## What is succession planning?

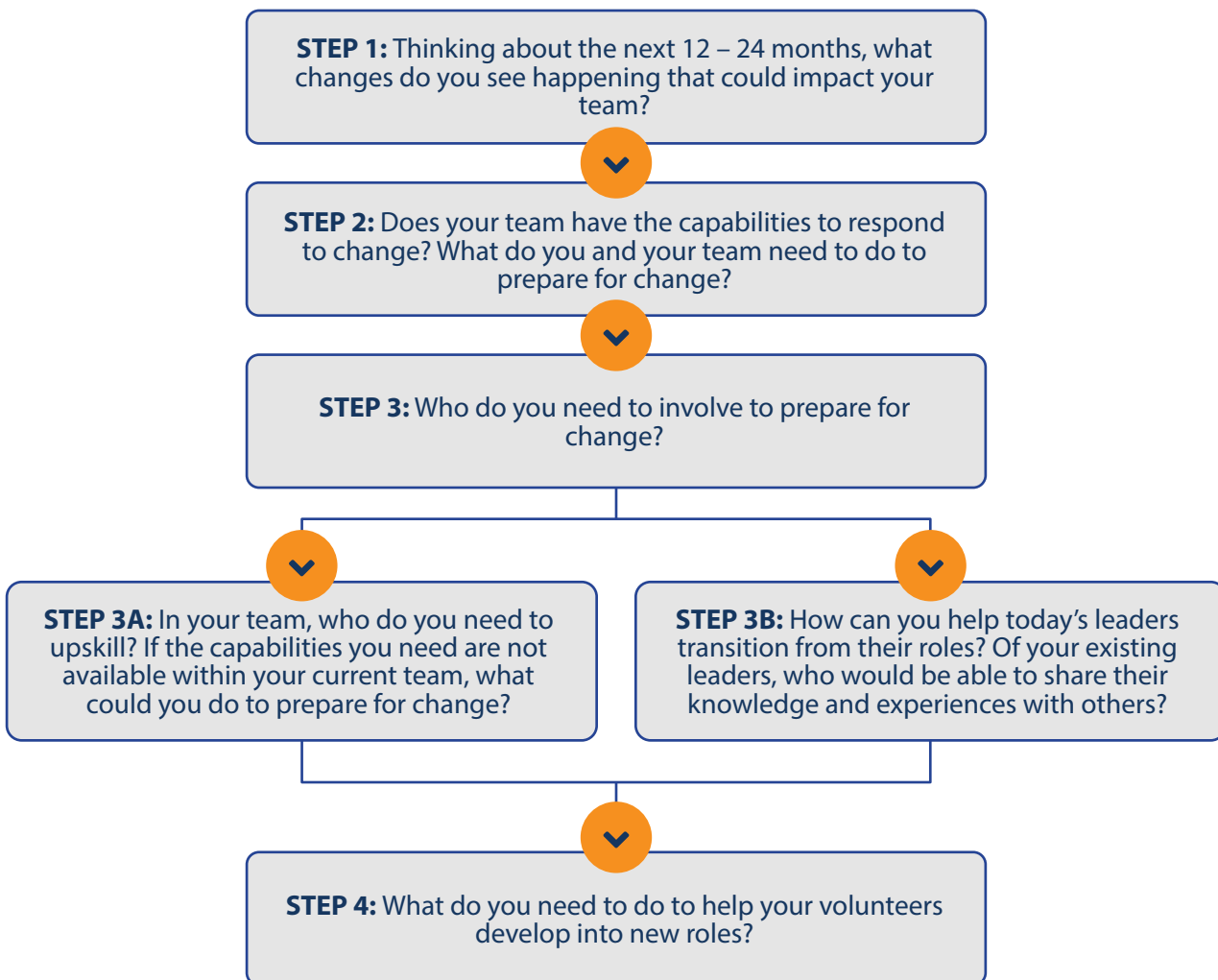
Succession planning is when a volunteer leader *thinks about the future of their volunteer team and how best to prepare for that future.*

Two outcomes of succession planning include:



## What is involved in succession planning?

Succession planning involves the following four steps:



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# Introduction

## Before we start...

Think back to the day you were first given the volunteer role you are currently in...

- ☼ How did you find yourself in this role? What processes did you go through (e.g., training, social support)?
- ☼ What did you enjoy about those processes?
- ☼ What didn't you enjoy about those processes?
- ☼ What do you think could have been improved?

Think about somebody who is vital to your team. It could be your volunteer leader/manager, secretary, treasurer, or even an ordinary member who has critical knowledge and experiences that your team really counts on.

- ☼ If that person left tomorrow, and you could not contact them again, what would happen to your team?
- ☼ Is there a volunteer in your team who would be available and capable to replace that person tomorrow?
- ☼ What processes could you put in place to prepare for this possibility?
- ☼ What arrangements could you make in your team to ensure that this person's knowledge and expertise is retained?

Ensuring your team is not at risk of losing critical knowledge is just one important goal of succession planning. To find out more about the succession planning practices that volunteers are currently conducting, we interviewed 14 volunteers from the five volunteer emergency services. Of those 14 volunteers:

**9 out of 14 said...**

Succession planning was critical for ensuring the efficiency of the current and future state of their teams

**8 out of 14 said...**

There were insufficient practices in place to help them advance into their current volunteering role

**7 out of 14 said...**

They are not confident that they have volunteers who can immediately replace people in leadership roles

**8 out of 14 said...**

They had no standard practices in place to help develop their volunteers to advance into leadership roles

# What is Succession Planning?

Succession planning is when a volunteer leader thinks about the future of their volunteer team and how best to prepare for that future.

Two outcomes of succession planning include:

Identifying and developing people for future leadership roles.

Assisting existing leaders in transitioning out of their current roles and helping to keep their experiences and knowledge within the team.

## Why is Succession Planning Important?



It encourages the sharing of knowledge between volunteers



It provides learning and development opportunities to volunteers



It allows younger and/or less experienced volunteers to feel valued for their potential



It allows older and/or more experienced volunteers to feel appreciated for their knowledge



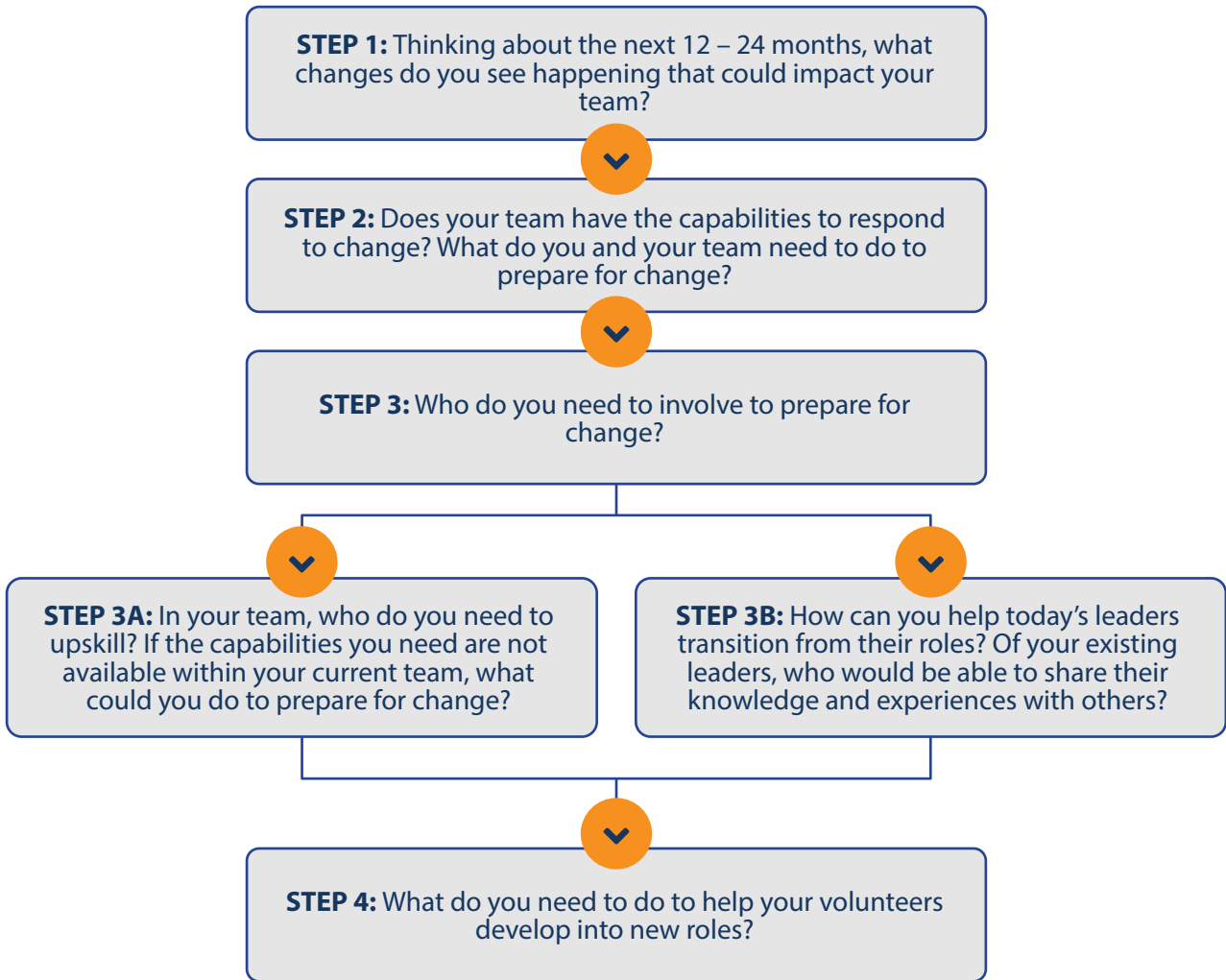
It increases role satisfaction in volunteers



It enables volunteer teams to maintain continuity and service provision

# The succession planning process

You can plan for the future of your volunteering team using the succession planning process shown below:



# Step 1:

## Thinking about the next 12-24 months, what changes do you see happening that could impact your team?

The first step to succession planning starts with you thinking about potential changes that could impact your volunteering team in the next 12 to 24 months.

Examples may include:

**New residential or commercial developments in town.**

**Changes to the environment impacting the ability and willingness to volunteer.**

**Technological advances that may impact volunteering or service provision experience.**

**New and departing members.**

**Changes to current volunteering activities and roles.**

**Changes to reporting structures within the team.**

**Existing leaders wishing to step down, or volunteers wishing to step up into leadership roles.**

Once you have considered potential changes, take a moment to consider what impacts they could have on your volunteering team.

Next, we will plan how best to prepare for them based on your team's current capabilities.

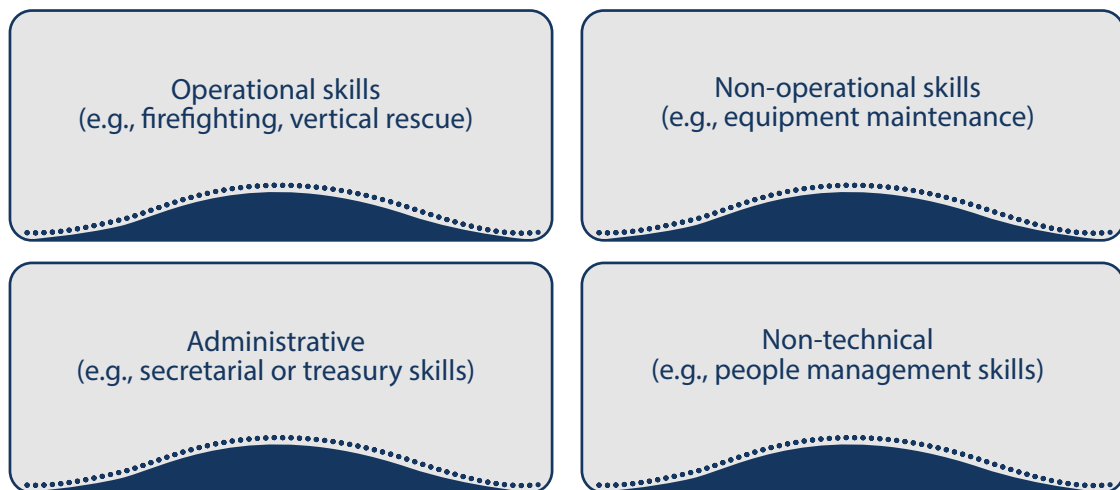
# Step 2:

## Does your team have the capabilities to respond to change? What do you and your team need to do to prepare for change?

Look closely at your team to determine if they have the capabilities to respond to the changes you identified. If you feel they do not, you will need to plan how to prepare them to respond to those changes.

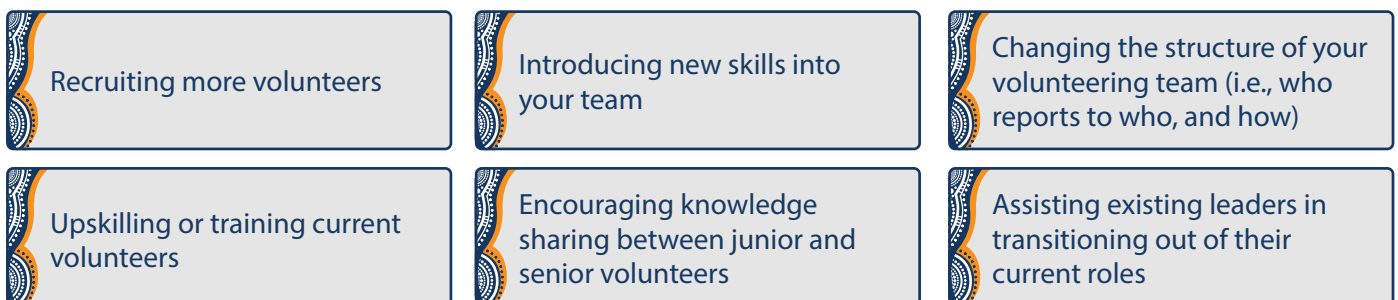
### What are your team's current capabilities?

Looking at the changes you identified, ask yourself what capabilities are available within your current team to respond to those changes. When answering this question, consider the different skills that may be available within your team. These skills might include:



### What preparations can be made to respond to change?

Consider what preparations you and your team need to put in place to prepare, such as:



#### Additional Resource:

Could your team benefit from creating a whole new type of volunteering role (e.g., Senior Volunteer Mentor, or Social Media Officer)? If so, the **Volunteer Role Descriptions** resource can help you build that role.



# Step 3:

## Who do you need to involve to prepare for change?

You have identified the potential changes that could affect your team and you have also considered whether your team has the capabilities needed to respond to them. Now, it is time to decide who needs to be involved in the preparation.

Consider these three areas:

Which of your current volunteers need upskilling or training?

Which existing leaders should be encouraged to transition out of their current leadership roles?

What options do you have if your current volunteers don't have the capabilities you need for the future?

## Step 3A:

### In your team, who do you need to upskill? If the capabilities you need are not available within your current team, what could you do to prepare for change?

This step will help you determine which of your volunteers require upskilling to ensure that they have the capabilities to adapt to upcoming changes, or what to do if upskilling is not an option.

#### How do you identify which volunteers to upskill?

When choosing which of your current volunteers you could upskill, consider the following:

#### Current Status

- Their experience
- The training they have completed
- Their contributions to the team

#### Interests

- If they have any skills that they can contribute to the team that are different from what they are currently doing
- Their interest in progressing into future leadership roles

#### Potential

- Their previous contributions and efforts
- How far they have improved over time
- Whether they are willing to learn and improve further

### Strengths

- Their strengths, including their personality, experience, and relationships within the team, and how it would help them to upskill and progress into future roles

### Life Situation

- Availability and commitment based on their current work and family situations
- Whether opportunities exist to support your volunteer to take on a new role

### Diversity

- It is important to provide opportunities for everyone in your team, including people with different ages, genders, racial backgrounds, physical and/or mental abilities

## What can you do if the capabilities you need are not available in your team?

Here are some creative ways to support your team and build capability:



### Distribute the workload across your volunteers

- *"When I first started, we had a member who did almost everything. She was the judge, jury, and executioner, but then she passed away, which left a huge gap, and I realised that no one knew how to do anything around the unit. Since then, I've made it so that no one is responsible for everything, but just one to two things."*



### Recruit volunteers who volunteer remotely

- *"We need to think of situations where in smaller towns, we struggle to find someone in our own town. In that case, I recommend finding people outside who volunteer remotely, and have that level of flexibility."*



### Outsource the work to external contractors

- *"We now contract super technical things to external people, so the administration officer is more of a liaison role, more of a communications/IT liaison/external contractor support type role."*



### TIP:

*To ensure you reduce biases in your selection of volunteers to upskill, include a range of people in the assessment process as you consider your team members.*

## Step 3B:

### How can you help today's leaders transition from their roles? Of your existing leaders, who would be able to share their knowledge and experiences with others?

Transitioning existing leaders out of their current roles can be difficult, especially when leaders have been in those positions for a long period of time. This step will help you choose what knowledge and experiences should be shared with others, how to encourage knowledge-sharing between senior and junior volunteers, and how you can help today's leaders progress into future roles.

#### What knowledge should be shared by existing leaders?

Consider the knowledge and experiences of your existing leaders, and what value they could bring by sharing it with others, including:

- Operational knowledge and skills
- Non-operational knowledge and skills
- Any knowledge that is specific to the volunteering group, such as administrative records, financial systems, historical matters, or stories

#### How can you encourage knowledge-sharing?

To encourage existing leaders to share their knowledge and experiences with others, it is recommended that you:

- Emphasise the value of their knowledge and experiences
- Clarify any concerns they might have about sharing their knowledge
- Highlight the positive outcomes of them sharing their knowledge

#### How can you help today's leaders transition from their roles?

It is recommended that you:

- Discuss with existing leaders their current state of volunteering
- Speak to them about their interests and if they have ideas of what types of activities or roles they are interested in, such as being a training officer or mentor
- Have in mind a clear role they could transition into, but be prepared to be flexible
- Emphasise the positive outcomes of transitioning into different roles, like the opportunity to learn new skills, contribute to the next generation of volunteers, and being able to continue to develop as a volunteer
- Consider step-down arrangements, like role sharing or mentoring, that would allow existing leaders to step down from their roles in small steps
- Reassure them they are appreciated for their knowledge and skills, and that the team would benefit from them continuing to volunteer



*"[Previous] leaders have tons of expertise. Previous leaders should hang around because of their knowledge and experiences, but they shouldn't be a 'backseat leader'. They can continue mentoring, but they need to work with, not against, the new leader. Some people cannot let go, so transparency is key."*

- Merv Austic, Executive Officer, Volunteer Fire and Emergency Services Association, Western Australia.



## Step 4:

### What do you need to do to help your volunteers develop into new roles?

This step is relevant to both volunteers progressing into leadership roles, and existing leaders transitioning out of their current roles. This step ensures that the volunteers have the necessary knowledge, skills, and abilities needed to perform effectively in their next role.

There are three steps involved in developing your volunteers, including:



### How do you create a volunteer development plan?

To create a volunteer development plan, it is recommended that you:

- Sit down with each volunteer and create a development plan that is specific to them
- Outline what the volunteering pathway to their new role would look like
- Detail a series of small steps that would allow volunteers to ease into the role in a progressive manner
- Identify any training gaps or limitations that need addressing
- Include a realistic timeline of how long the development process could take

### How do you support volunteers in their development?

To support your volunteers in their progression into their next role, here are some recommended steps you could follow:

## How can you give volunteers autonomy in their new role?

Allowing your volunteers autonomy (i.e., the freedom to design their tasks and role) will help them feel more engaged and satisfied in their new roles.

- ❁ Ask volunteers questions on whether they have any ideas or suggestions on how to perform the tasks in their new role more effectively
- ❁ Provide them with the freedom to explore their ideas and suggestions
- ❁ Support their change efforts and exchange constructive feedback on what improvements could be made within the volunteering team

Some ways that you could allow volunteer autonomy are to:

## How are teams developing their volunteers?

Here are some examples of how different teams have developed their volunteers to ready them for their next role:

### Bayswater SES

This unit employs a 'Leadership skills' checklist that details the operational skills necessary for those interested in training up to fill a leadership role. Once the volunteers have their checklists, they are assigned a mentor who looks at any gaps in their skills and knowledge, and guides them through what they need to do for training.

### Tambellup VFES

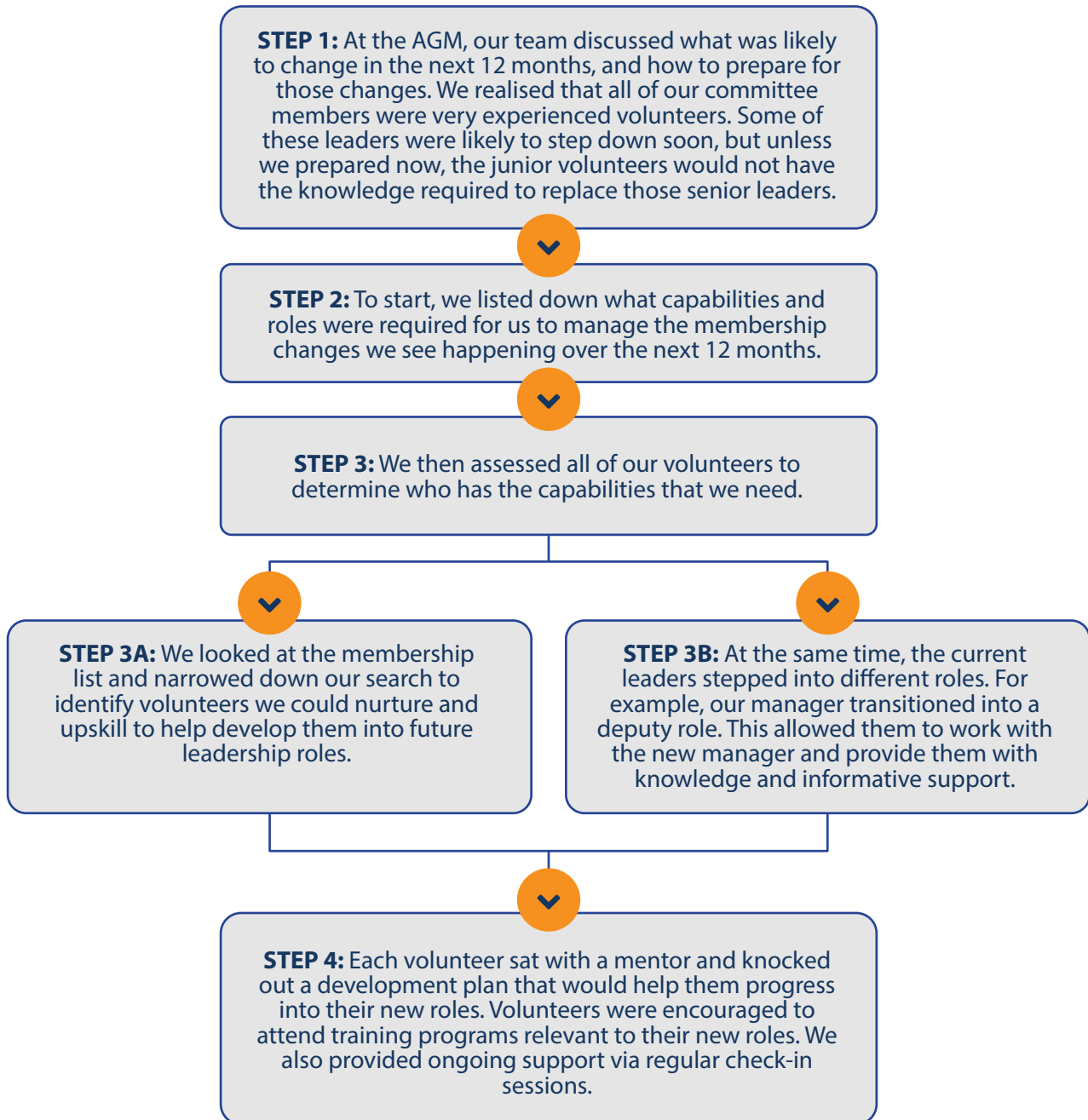
Mentoring is always available within this brigade. People are given on-the-job mentoring by their team leaders, and if volunteers were to step into leadership roles, they would have a mentor to guide them through any issues they are facing.

### Exmouth VMR

The current leaders in this group will sit down with potential leaders, and work out what questions they have, what is intimidating and/ or concerning them, and work through these issues with them, and talk about what processes they have to go through. They will also ask for fresh ideas on what to change within the group.

## Example Succession Plan

Below is an example succession plan based on volunteer input:



# Acknowledgments:

This page is to acknowledge the informative and kind volunteers, volunteering groups, and organisations listed below who helped in the creation and information given in this handbook. Your contributions and willingness to engage in insightful conversations were very much appreciated. Without your support and help, this handbook would not have been possible. Thank you.

**Baldivis VFES**

**Bayswater SES**

**Cervantes VFES**

**Exmouth**

**Geraldton**

**Mandurah**

**Marble Bar VFES**

**Naturaliste**

**Rockingham VFRS**

**Shark Bay SES**

**Tambellup SES**

**Walpole VMR**

**West Swan BFB**

**Wyndham VFES**

**Emergency Services Volunteers Association  
Incorporated**

**Marine Rescue WA**

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