



Succession Planning Template: A template for 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.*

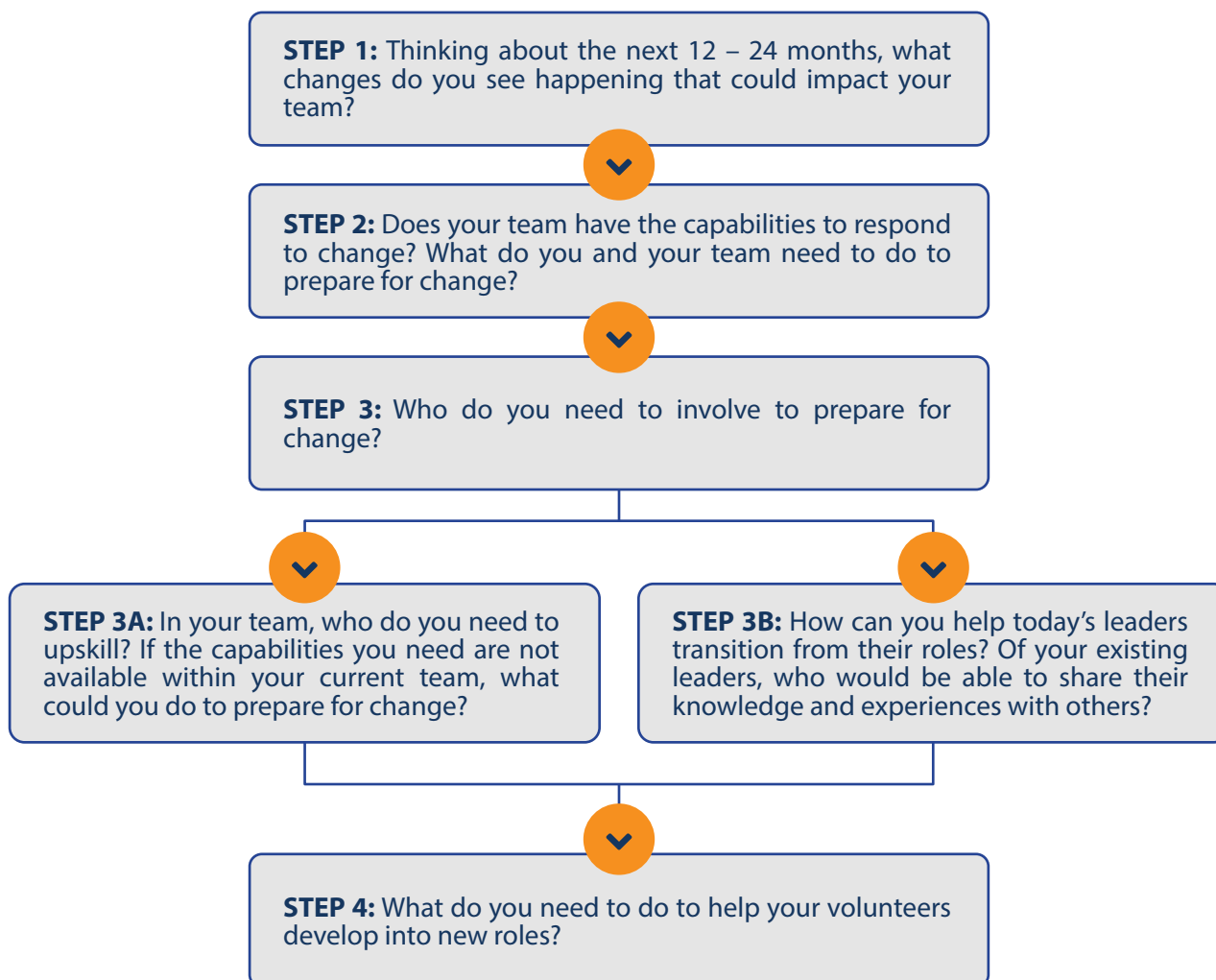
Two outcomes of succession planning include:

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.

What is involved in succession planning?

Succession planning involves the following four steps:



What is in the succession planning template?

The Succession Planning Template is a resource for volunteer leaders and those who work with and manage volunteer teams. This template is intended to guide the process of succession planning, and it accompanies the Succession Planning Handbook.

The Succession Planning Template provides a step-by-step guide through the succession planning process, using question prompts, how-to tips, and writable sections to guide the discussions and planning between volunteers within a team, and/or those who work with and manage volunteer teams.

Each volunteering team is different and has different needs. We encourage you, as a user, to treat these steps as recommendations, as opposed to prescription. Modify sections as you see fit for your needs.

Best of luck!

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The succession planning template

Read below for more information on the Succession Planning Template, who should use it, what it is intended to be used for, and lastly, how it can be used to plan for the future of your volunteering team.

What is the purpose of the succession planning template?

The purpose of the template is to assist volunteer teams to plan for changes to the environment they operate in.

What is in the template?

Question prompts, how-to tips, and modifiable tables that will help guide you through succession planning for your volunteering team.

Who should use the template?

This guide is for volunteers and those who work with them who are responsible for supporting volunteer development and team capability.

How should the template be used?

It is recommended that you review each page, discuss each question prompt with your team, and add relevant information in the spaces provided. You can alter the sections as needed. Similarly, you can duplicate sections you find most useful.

Do I have to complete all steps in the template?

No – you can remove any steps or delete any sections that are not relevant to your team. Just be careful not to remove anything that may be important in helping volunteers progress into new roles.

How much detail should I go into in the template?

It is important that you include enough detailed information that will help reduce any ambiguity, concerns, or questions that volunteers (both leaders and non-leaders) might have.

At the same time, it is important to not overwhelm them with too much information. If you are unsure whether something might be important or if it could be left out, discuss with your team to see what they think.

How often should the template be used or updated?

As situations in volunteer teams may change over time, it is important to revisit the template at least once every 12 months. Once you complete the document, set a reminder to revisit it as a team in a year's time to update where necessary.

We hope that the template proves to be useful in your volunteering team. Best of luck!

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.

Using the box below, write down the changes that you could see happening in the next 12 to 24 months that could impact your team. Examples include changes in *the environment, technology, volunteer membership, and changes to volunteering roles or activities.*

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?

Looking at the changes you identified, consider what capabilities are needed to respond to change, and what capabilities are available within your current team.

It is important to consider the different types of skills needed within the team.

Types of skills	Capabilities that are available within your team	Capabilities needed to adapt to upcoming changes
Operational (e.g., firefighting, vertical rescue)		
Non-operational (e.g., equipment maintenance)		
Administrative (e.g., secretarial or accounting skills)		
Non-technical (e.g., people management skills)		

What preparations can be made to respond to change?

Looking at your team, consider what preparations you and your team need to put in place to prepare for change.

Examples of preparations include: Recruiting more volunteers, introducing new skills into your team, upskilling or training current volunteers, or assisting existing leaders in transitioning out of their current roles.



A large, empty rectangular box with a thin orange border, intended for notes or a diagram.



Step 3:

Who do you need to involve to prepare for change?

Once you have identified the potential changes that could affect your team and you have considered whether your team has the capabilities needed to respond to them, you need 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 or training to ensure that they have the capabilities needed to adapt to upcoming changes.

How do you identify which volunteers to upskill?

To understand what capabilities your volunteers need to be upskilled or trained in, you must consider your volunteers' current capabilities. To achieve this, fill out the table below for each of your volunteers:

Name of Volunteer		
Current Volunteering Role		
Current Status <i>The volunteers' experience, completion of training, and/or contributions to the team</i>		
Interests <i>If the volunteer has any skills they can contribute to the team that are different from what they are currently doing, and/or if they are interested to progress into leadership roles</i>		
Potential <i>The volunteers' previous contributions and efforts, how far they have improved over time, and their willingness to learn and improve further</i>		
Strengths <i>The volunteers' strengths, such as their personality, experience, or relationships within the team, and how it would help them to upskill and progress into future roles</i>		
Life Situation <i>The volunteers' availability and commitment based on their current work and family situations, and whether opportunities exist to support volunteers in taking on a new role</i>		

What development opportunities would the volunteers need?

Based on the volunteer assessment conducted on the previous page, you can identify development opportunities to upskill or train your volunteers in to help them gain the needed capabilities. It is important when you are doing this step that you provide equal opportunities for upskilling volunteers of different ages, genders, racial backgrounds, and abilities.

If the capabilities you need are not available within your current team, arrange for creative ways to support your team and build capability (ideas for this can be found on page 11 in the Succession Planning Handbook!).

Name of Volunteer	Capabilities Needed	Key Development Opportunities
Example: <i>Eve Rutherford</i>	<i>Understanding the team's financial systems</i>	<ul style="list-style-type: none"> ☼ <i>Eve will require training to understand the financial tasks and financial systems used by the team.</i> ☼ <i>Arrange a training plan with the current treasurer (development template will be laid out in Step 4!).</i>

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 identify what knowledge and experiences should be shared with others. It will also help you create knowledge-sharing opportunities between senior and junior volunteers and identify potential roles that existing leaders can transition into.

What knowledge should be shared by existing leaders?

Using the table below, consider the knowledge and experiences of your existing leaders, and list down the important knowledge that should be shared with other senior and/or junior volunteers:

Type of knowledge/skills	Key Development Opportunities
Operational <i>(e.g., firefighting, vertical rescue)</i>	
Non-operational <i>(e.g., radio communications, maps and navigation)</i>	
Knowledge that is specific to the volunteering group <i>(e.g., administrative records, financial systems, historical matters, or stories)</i>	

How can you encourage knowledge-sharing?

Here are some tips on how to encourage your existing leaders to share their knowledge and experiences with others:

- ✿ 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

Once you have encouraged your existing leaders to share their knowledge, create arrangements that support existing leaders to share their knowledge with others as shown in the example given in the table below.

Name of Volunteer	Key Knowledge and Experiences	Knowledge-Sharing Arrangements
Example: <i>Alex Chen</i>	✿ <i>Senior firefighting skills and experience</i> <i>First Aid</i>	✿ <i>Arrange for Alex Chen to host training nights fortnightly that will teach junior firefighters his knowledge and skills.</i>

How do you identify what roles to progress today's leaders into?

To encourage today's leaders to transition out of their roles, refer to the recommended steps provided on page 12 of the Succession Planning Handbook.

Below is a table that you can use to identify what roles your existing leaders could transition into based on their key skills, knowledge, and expertise, as well as their interests. As you are filling out the table below, be sure to sit down and discuss this with your existing leaders.

Name of Volunteer	Current Role	Key Skills, Knowledge, and Expertise	Interests	Potential Future Roles
Example: <i>Alex Chen</i>	<i>Team Leader (Firefighter)</i>	<ul style="list-style-type: none"> Senior firefighting skills First Aid 	<ul style="list-style-type: none"> Teaching junior volunteers his firefighting skills 	<ul style="list-style-type: none"> Mentor, or Training Officer

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 will help you plan the development of your volunteers to ensure that they have the necessary knowledge, skills, and abilities needed to perform effectively in their next role.

How can I develop and support volunteers for their next role?

It is recommended that you sit down with each volunteer you are working to develop and support for their next role and go through the Volunteer Development and Support Plan given below. You can print or duplicate the Volunteer Development and Support Plan to accommodate the different volunteers you wish to develop.

Name of Volunteer			
Current Role			
Future Role			
What training gaps and/or limitations do they have?			
What documents should be provided to the volunteer? <i>List them down.</i>			
How long will the development process take to complete?			
Development Plan <i>Detail small steps that can be taken to help bridge the gap of where the volunteer is currently at and where they need to be.</i>	Step	Activities to Complete	Date to Complete Activity By
	1.		
	2.		
	3.		
	4.		
	5.		

What outcomes will this Plan achieve?	
What obstacles may affect the volunteer's development?	
What support systems can be put in place to help volunteers overcome these obstacles? <i>Examples include regular check-in sessions or mentoring.</i>	
When should the next follow-up session be scheduled to assess progress? <i>List down a specific date and time.</i>	
To be used in the follow-up session:	
Referring to the Development Plan above, have the outcomes been achieved?	
If not, what obstacles prevented the outcomes from being achieved?	
If necessary, when will the next follow up session be?	

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