

3. SUCCESSION PLANNING

Succession Planning Template

Use the following template as a guide to create a succession planning spreadsheet which will help the club committee track how long current volunteers will fill key seasonal roles and identify potential successors for each role.

getting started

HOW TO USE THIS GUIDE

While completing the modules this activity guide will prompt you to consolidate the knowledge you have learned and identify ways in which these strategies can be put into action at your club.

Upon completion of the module and this activity guide you will have tangible foundations and direction that can be implemented at your club.

Succession Planning Template

SUCCESSION PLANNING FRAMEWORK

Role	Person	Time Served	Vacancy	Urgency	Successor	Training/ Development Plan
President	John Doe	3 years	1 years time	Short term	Jessica Smith	On-job shadowing, role sharing
Vice President	Jessica Smith	2 years	1 years time	Short term	James Bolt	On-job shadowing, role sharing
Treasurer	Taylor Jones	3 years	1 years time	Short term	Jacob Matthews	On-job shadowing, role sharing Training with Xero
Secretary	Jason Reynolds	2 years	2 years time	Long term	Not Identified	
Canteen Manager	Vacant	3 years	Vacant	Urgent	Not Identified	

Create a succession planning spreadsheet that mimics the above structure following the guide below.

1. Begin by identifying the key seasonal roles that need to be filled for your club to be stable from year to year. The volunteer roles audit spreadsheet and the committee and volunteer chart developed in the module 1 guide can be utilised to establish the list of seasonal roles that need to be filled on an annual basis for the club to operate.
2. Identify who currently fills each role, how long the current volunteers have been in the respective roles, and how long they anticipate remaining in that role. If a role is currently vacant, highlight this vacancy as a key point for discussion at the next committee meeting.
3. Identify who would be an appropriate candidate to succeed the current volunteer. (Use the volunteer register from module 2, to assess options if an obvious replacement is not available). If you are unsure of a potential replacement, highlight this vacancy as a key point of discussion at the next committee meeting.
4. Finally, identify what training, mentorship, shadowing or experience the incoming volunteer requires before taking on the new role.
5. Present the spreadsheet to the committee at the next committee meeting and seek input from other members of the committee.
6. Review succession planning as a standing agenda item of committee meetings.

