

# Succession Planning Workbook

*(Insert Society Logo)*

*(Insert historical organisation or heritage group name)*

## Succession Plan

*(Insert year period e.g. 2018 – 2019)*

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 Society)*

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

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

## The 7 Steps

This workbook takes you through seven steps to develop a plan for identifying and developing the potential successors of your organisation.

1. The Mission and Vision Statement
2. Clarifying the Society Position
3. Identifying Critical Roles in the Society
4. Time Frame for Vacancy in the Roles
5. Recruitment of Successors
6. Successors Development Plan
7. Evaluation

## The Process

The workbook outlines the process for completing each step and a template to document the results.

1. The Mission and Vision Statement - This is where you revisit the purpose of your society and future aspirations. Pg 3
2. Clarifying the Current Position - This is where you evaluate the current situation – what’s working and what you want to change. Pg 7
3. Identifying Critical Roles is an assessment of the critical roles and activities that fulfil the goals of the organisation. Pg 11
4. Identifying the Time Frame for Vacancies - This is where you address when critical roles need to be filled. Position Description/s is where you outline the key skills, knowledge and personal qualities required to carry out the key positions in your society. Pg 14
5. Recruitment of Successors - Here you identify how you are going to find people to fill the roles – current members, volunteers or external recruits. The induction and development of successors is where you plan for how you are going to bring new members and volunteers into the organisation. Pg 19
6. A Development Plan for Successors - Here you outline the required knowledge and skills to be developed. Pg 25
7. Evaluation - Here you check whether the succession plan is working as intended, along with any changes in the society or community that need to be taken into account. Pg 29

## Step 1- The Mission and Vision Statement

To start the succession planning process you need to ensure that you know what you do, how you do it and also why you do it. You also need to know what long-term inspired change you want to bring about. The former is about here and now, the latter about your vision and aspirations for the future.

### The Mission

A Mission establishes the distinctiveness and importance of what the organisation does and its value to the communities it serves. The key question being asked of every organisation is, 'What is the value to the community?' A good mission statement is the answer to that question.

Mission statements must be clear, practical, and up to date. The mission statement describes the reason your organisation exists and is used to guide decisions about priorities, actions, and responsibilities. Revisit your mission statement – does it still reflect the current purpose of the organisation?

The Royal Historical Society of Victoria have developed a useful guide to developing a mission statement:

*'A Mission Statement, also known as a Statement of Purpose defines the broad aims of the organisation. In summary form, usually one or two sentences, the Mission Statement includes the primary reason for existence of the organisation and lists the prime functions. For historical societies and museums the geographical area covered, the time period and / or main subject interest may be considered when formulating a Mission Statement.'*

*It is important to develop and approve the Mission Statement as a group because it forces the members of the organisation to identify, reflect and agree on the main activity of the organisation. Mission statements can take a long time to agree upon but in the end the phrase or sentences may be very simple; the most important thing is that its meaning is understood'.*

An understanding of whom your society is aimed at and what it will offer the community will help you plan your society so it can be relevant and well supported. Being able to show how your society adds value to your community can also assist with attracting funding and government support.

The official 'objects' in the constitution should be aligned with the mission statement. However many official 'objects' have been written some time ago and may no longer reflect the contemporary purpose of the organisation. If you update your mission statement in line with what you are trying to achieve you will need to amend the constitution.

### Vision Statement

While a Mission Statement describes what you want to do now, a vision statement defines the aspirations of your organisation. Developing a Vision Statement is a useful exercise as it forces you to outline your value or usefulness – the contribution you wish to make. Strong vision statements are inspirational, clear, memorable and concise.

Many historical societies develop an educational and community-oriented vision statement with an outward looking perspective. An outward looking perspective points to how historical societies serve the community and value add to public benefit. This enables a society to outline how it intends to use its assets and resources to contribute to the change it envisions. This may include intangibles such as health benefits, social connection and increased community resilience. A statement that defines a society's usefulness, whom it will serve in the community and the distinctive way it will do this, is a robust tool for facing the future.

*'We are in the business of serving the community'*

Christine Elaine, Cockburn Historical Society

Below are examples of mission and vision statements from historical societies in Australia and overseas.

<b>The Puffing Billy Preservation Society, Victoria</b>	
<b>Mission Statement</b>	<b>Vision Statement</b>
To preserve, restore and operate the Puffing Billy Railway as Australia's premier heritage steam railway, in a safe efficient and economically sustainable manner, for the ongoing education, benefit and satisfaction of the community, customers and the Railway stakeholders, including staff, volunteers and members.	Engaging people in the preservation of Puffing Billy Railway for current and future generations
<b>Royal Western Australian Historical Society</b>	
<b>Mission Statement</b>	<b>Vision Statement</b>
<p>Foster interest in and enjoyment of Western Australian history foster and promote research, writing and publication about all aspects of Western Australian history</p> <p>Recognise outstanding achievement in Western Australian historical research, education and publication</p> <p>Be recognised as a leader in the promotion of the history of Western Australia</p> <p>Cooperate with all others in the field in the study and promotion of the history of Western Australia</p> <p>Be a recognised resource for Western Australian history to complement State collections</p> <p>Be recognised as an advocate in the conservation and promotion of the State's cultural heritage.</p> <p>Encourage and support local Affiliated Societies throughout the State.</p>	Present and future generations will have access to the history of Western Australia.
<b>Cheshire Historical Society, UK</b>	
Keeping Cheshire's history alive through our museum's collections, exhibitions and programs.	The Cheshire Historical Society will be totally integrated in the life and interest of the community as the visually and technologically accessible source of regional historical information and knowledge.
<b>Historical Society of Central Florida, US</b>	
<b>Mission Statement</b>	<b>Vision Statement</b>
The Society's mission is to preserve Orange County and Central Florida heritage by providing resources to help maintain the Orange County Regional History Center where history is learned through exhibits and educational programs relating history to our daily lives.	Our vision is to build resourceful relationships that help Orange County Regional History Center become a leader in providing comprehensive life-long learning.



## 1. Mission and Vision Statement

In the mission statement section state in meaningful terms the purpose of the organisation. Complete the vision statement outlining future visions and aspirations for your society.

<b>Statements to define and guide your organisation</b>	
<b>Mission Statement</b> (define the broad aims of the organisation to identify the distinctiveness and importance of the organisation)	
<b>Vision Statement</b> (describe the clear and inspirational long-term desired change resulting from your organisation's work)	

## Step 2 - Clarifying the Current Position

It is critical to fully understand your current position so you can plan for your future success. You may have already thought about these areas and detailed their needs and objectives in a strategic plan or discussed these questions at a planning meeting. If this is the case, you should refer to your strategic plan or other relevant forward planning documents to help you complete this section or you can use this workbook to inform your strategic plan.

In order to understand the situation of your society, consider these three areas: society management (the people responsible for leadership and governance in your society), society people (members and volunteers) and society activity (what you do).



Reflect on the following questions and add your own for your situation. Jot down notes on your answers to assist you in filling out the template.

### Management (the management or executive committee)

- Does your management committee work well as it is? If not, what is it about the current structure that doesn't work?
- Do they have the right skills and expertise or are there skills or expertise missing?
- What is the make up of your management committee? Do you have women, young people and/or culturally diverse voices being heard?
- Does your management committee reflect your membership base?
- Do you engage with the local community?
- Are there clear lines of communication between the management committee, subcommittees, society members and volunteers?
- Do you have paid or contract staff – how are these people managed?

- What is the management committee turnover like? Have 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.

### People (members and volunteers)

- Do you have enough members to make your society viable? Are participation rates satisfactory or are you looking for new members?
- Do your members and volunteers have the right skills and experience?
- Are your members happy with the society and does your society have a positive society 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 society?
- Do you have trouble attracting members or volunteers for the long term and is your recruitment process working well?
- Do you currently provide support to your volunteers and invest in their development through offering training, mentoring etc?
- What might happen in the next 2-5 years that will have an impact on your volunteer or membership base (e.g. volunteers retiring, loss of skills, members fees going up, digital forms of doing history that exclude some members, other forms of engagement that draw volunteers away from your society)?

### Activity (the activity of the organisation)

- What does your society do really well?
- Who is this servicing – the members, the community, online visitors etc
- Is competition for your services strong?
- How many inquires do you receive? What level of community participation do you have? Do you have an online presence? How many visitors come to your historical society/museum?
- What types of historical activity are you undertaking (eg collections; running a museum, research, publications, events)?
- Do you undertake research and do you engage with current historical scholarship?
- Are your members undertaking historical activities able to undertake the tasks adequately? Do your active members have access to good support?
- Do you have regular activities and events – too many/not enough?
- Do you have the appropriate venues for your research/collections/meetings etc?
- Does your society have access to enough resources (money, equipment, storage etc.)? Or do you need to access better/more resources?
- Is your society thriving?
- What changes do you want to see to the activities of the historical society in the next 2-5 years?

- Are there other changes that you desire in the activities of the historical society in the next 5-10 years?

Thinking about these questions will help highlight what you need to do to fulfil your intended mission and thrive as an organisation. It also helps you see the long-term needs of the society.

You may also wish to address changes you want to see over the longer-term over the next 5-10 years.



## 2. The Society Position

Identify the things your society does well, the things you would like to do better and the changes you want to see happen in the next 2-5 years.

	<b>Things your society does well (Strengths)</b>	<b>Things you would like to do better (Weaknesses)</b>	<b>Changes that need to occur in 2-5 years (Opportunities)</b>
<b>Management</b> Governance responsibilities that guide the operations of the organisation	1. 2. 3.	1. 2. 3.	1. 2. 3.
<b>People</b> Skills essential for your organisation to deliver its services	1. 2. 3.	1. 2. 3.	1. 2. 3.
<b>Activities</b> Society activities that fulfil your goals	1. 2. 3.	1. 2. 3.	1. 2. 3.

### Step 3 - Identifying Important Roles

The next step is to identify what you see as the important roles that contribute to your society's success. In this step outline the key roles within your society that will serve to address your needs now and into the future. The point is to think about what roles are important in making your historical society a success and what roles are needed in the next 2-5 years.

#### Roles for the things you do well now

Identify the roles in the historical society that contribute to the current success of your historical society. Refer to your response in Step 2 where you evaluated the society position and identified what you do well.

Ask yourself who are the people in your historical society who contribute to this? What roles do they currently perform? Focus on the role/position and not the individual people in those positions. For Governance outline the leadership, strategic and key communication roles associated with the management committee that is working well for you. For society activities outline the roles that support what you do well – e.g. writing history; running programs for schools visits, collection management etc.

#### Identify the roles that you want to do differently or better

Refer to your responses in Step 2 where you outlined what you'd like to do better.

Think about the current roles within your organisation that are responsible for addressing the things that you'd like to do better. For example, it could be your President who is responsible for improving communication on strategic issues. You have identified that you want to attract more money, as the local government is no longer providing financial support. The Vice-President could therefore address the need for more money coming in. Perhaps you need to create a new position to focus on fundraising, grant writing or sponsorship.

Do the current volunteers cover all the work of your organisation? Is a volunteer coordinator required as recruiting, retaining and recognising volunteers are important to your historical society? It could be a curator because improving interpretation of the exhibits is important to attract more visitors to the society museum. One of the things you might have identified is a need for someone whose specific role is to handle marketing and promotion – who would do this?

#### Identify the roles that are critical for making the changes that need to occur in the next 2-5 years.

Refer to the responses in Step 2 where you outlined the changes that need to occur in the next 2-5 years. Here identify the roles that relate to governance and other society activity. Perhaps you want to involve younger people. Consider which position in your historical society is responsible for this. For many historical societies where the membership is aged between 65-80, younger membership

might be anyone under 60. Clarify what you mean by younger people. Is it currently anybody's responsibility or do you need to create a new position that addresses targeted community engagement.

Finally, think about whether there are any roles you have not covered but you think are critical to your historical society's future. These roles might include support staff that can assist with web site maintenance or other digital media outreach that might appeal to a younger age demographic



### 3. Critical Roles in the Society

Outline the key roles within your society that will serve to address your needs now and into the future.

	<b>Roles for the things you do well now</b>	<b>Roles for what you want to do differently/better</b>	<b>Roles that are critical in contributing to the changes in the next 2-5 years</b>
<b>Governance</b> (Governance e.g. leadership, communication, accountability, and strategic direction)	1. 2. 3.	1. 2. 3.	1. 2. 3.
<b>Society activity</b> (Other society activities eg writing history; collection management; public programs; running museum)	1. 2. 3.	3. 3. 3.	1. 2. 3.

## Step 4 - Identifying the Time Frame for Vacancies and developing Position Descriptions

In this step you want to assess to the best of your ability the expected vacancies along with the skills or knowledge required in the role and any training required. You may already have some knowledge of when people are planning to leave or you may need to find this out. Talk to members undertaking an active role in the organisation to find out their plans for the next 6 months to 2 years. You want to assess if a person is considering leaving the society or moving away. Your membership may be aging and facing ill health. Others may have been in the role too long and may be getting tired of the role.

### Skills needed in the Role

Identify the skills needed in the role. Talking to people currently in the role helps you understand the requirements more fully. For instance: what are the skills required to carry out a particular role? How simple is it for a new person to learn these skills? How much time and commitment is required? What are the personality traits or social characteristics that are necessary in the role such as communication and people skills for welcoming visitors to the society?

### Knowledge or training required

Here you identify what knowledge and training is required to bring people up to speed. People currently in the role may wish to diversify what they are doing or need assistance if the role has expanded. New technologies have changed the way that certain roles may be undertaken e.g. promotion of events via social media. How does this impact on the knowledge and skills required? Is additional knowledge required to fill the role? There may be a need to create a support role if the current person is not able to fulfil all the requirements of the role into the future. Is there a need for training people or seeking people with specific skills



#### 4. Time Frame for Vacancy in Roles

Identify the urgency of the role and expected date of vacancy. Rank the roles as either 'immediate' (within three months), 'short term' (in the next 12 months to two years) or 'long term' (in two years' time and beyond). List what skills are needed in each role and whether any knowledge or training is required to fulfil the requirements of the role.

Time Frame	Roles and expected date of vacancy	Skills needed in role	Knowledge or training required
Immediate (within three months)	1. 2. 3.	1. 2. 3.	1. 2. 3.
Short Term (within 12 months – two years)	1. 2. 3.	1. 2. 3.	1. 2. 3.
Long Term (in two years time or beyond)	1. 2. 3.	1. 2. 3.	1. 2. 3.

## Create Position Descriptions

Now that you have a good understanding of the roles required to make your society a success it is helpful to create position descriptions for each role. The position description documents what skills and experience are required for key roles.

You may have existing position descriptions for some of the roles in your society. If not you may ask people in those positions what skills and knowledge is required in the role. Identify the following:

- Objectives of role and key experience required.
- Why this position is so important
- The three main objectives of this role
- Which skills are required to carry out this position?
- Any previous experience that would help to carry out this role
- What knowledge is required?
- Is there any other expertise/personal quality or characteristic that is helpful to carry out this role successfully?

Writing a position description is not a set and forget exercise. It is important to revisit these position descriptions regularly and make appropriate updates.

*‘A good position description clarifies the responsibilities and support arrangements for a volunteer. It helps volunteers to be clear about what is expected of them and feel confident in their role. A position description also outlines how the role fits in with relation to the broader goals of the organisation’*

Volunteering Australia - Volunteering Roles Toolkit.

Devising a position description for each critical role might seem like overkill. However, it fulfils the rights and obligations for volunteers (Volunteering Australia: National Standards for Volunteer Involvement) and acts as supporting documentation if either volunteers or management committee are unhappy about the expectations of the role.<sup>1</sup>



### Position Description

Outline the key skills, knowledge and personal qualities required to successfully carry out the key volunteer positions within your society as well as the key responsibilities and accountabilities for each position.

<sup>1</sup> Volunteering Australia, National Survey of Volunteering Issues, 2006, [www.volunteeringaustralia.org](http://www.volunteeringaustralia.org). Volunteering Australia is the national peak body for volunteering, working to advance volunteering in the community

Duplicate the Position Description template for each role in the society.

### Position Description Template

**Position:** *(insert name of position e.g. Museum Curator)*

Description of role:

.....  
.....  
.....

Main objective of the role:

.....  
.....  
.....  
.....  
.....

Key skills required for this role:

- 
- 
- 
- 

Previous experience that would be beneficial:

.....  
.....  
.....

Other knowledge required:

.....  
.....  
.....

Personal qualities or characteristics, which are suitable for the position:

.....  
.....  
.....

Other considerations of the role:

.....  
.....  
.....

## Step 5 - Recruitment of Successors

Good recruitment results in attracting members and volunteers to fill some of the gaps you have identified. Recruiting members with the relevant skills, interest and commitment helps to ensure you can fill critical roles and support the society's objectives now and over the longer-term. Alternatively there may be volunteers who have worked on short-term projects who are right for the role. Direct approach to people works very well.

### Existing members

It is useful to assess the support for the mission of your organisation among the members, their professional expertise, motivation, and dedication.

Evaluate whether any of your current members possess any interest in the vacant roles, and what their time availability is over the next 12 months to 2 years or in the longer term. There may be a need to find someone immediately, you may know of people who have expressed an interest or you can directly approach people in the society and see if they are interested. If you have not already done so, you may need to undertake a skills audit to fully assess the skills of your current members.

Recruitment is not only finding someone with the right skills. Longevity and loyalty are important aspects as are attitude and commitment to the goals of the organisation.

### External Recruitment

In small towns it is often necessary to identify completely new people for the committee and other volunteer roles. Advertise so that people know that you are around and looking for people to join the society.

Consider ways that you can 'sell' the organisation and the benefits of joining. Ensure you acknowledge your success publicly and see everyone who visits the society as a potential volunteer. If you have a good following on social media pages, such as Facebook and Twitter putting out a post is a good way to spread the word.

A diverse member base opens up recruitment possibilities. For instance, people from backgrounds not currently reflected in the membership, who may have different skills, strengths and perspectives to offer. Many historical societies also recognise the need to recruit younger people as being critical to their future viability.

*'If your society is planning for the future and developing a succession plan, you need to seriously consider engaging young people in the management and day-to-day operations of your society'.*

## Community Club Toolkit: Succession Planning.

### Attracting Volunteers

Many societies have been successful in recruiting people for specific tasks (e.g. research, administration, assisting with cataloguing). Many of these may join as volunteers rather than members. Others have developed short-term volunteer projects for specific skills that may not exist amongst your members.

It is also valuable to create time-specific, outcome-focused roles. This could be preparing school curriculum materials, conducting an event, or cataloguing objects in the collection. It is also worth considering other ways that people can participate on a project-by-project basis and ways that people can contribute remotely.

There are a number of volunteer pages where you can advertise for free. This form of advertising attracts a diversity of applicants who may not have come to your organisation through advertising in the society newsletter or social media pages.

- Volunteering Australia is the national peak body for volunteering, working to advance volunteering in the community. Volunteering Australia has developed National Standards and a guide to best practice in managing volunteer programs.  
<https://www.volunteeringaustralia.org/>
- GoVolunteer is the national database for volunteer referrals and volunteer management <https://govolunteer.com.au/find-volunteers>.
- 
- Seekvolunteer is a site for advertising volunteering opportunities  
<https://www.volunteer.com.au/>
- Pro Bono Australia is the National, State and Territory peak body for Volunteering, Volunteer Resource Centres and organizations.  
<https://probonoaustralia.com.au/volunteer/>

In recruiting volunteers to work with you and support the broad goals of the organisation, it is useful to know about the rights and obligations for new and existing volunteers. You can ensure that you are familiar these obligations by reviewing this check list from Volunteering Australia on the rights and obligations of Volunteers:

Volunteers have the right:

- to work in a healthy and safe environment (refer various Occupational Health and Safety Act[s]);
- to be interviewed and engaged in accordance with equal opportunity and anti-discrimination legislation;
- to be adequately covered by insurance;

- to be given accurate and truthful information about the organisation for which you are working;
- to be reimbursed for out of pocket expenses;
- to be given a copy of the organisations volunteer policy and any other policy that affects your work;
- not to fill a position previously held by a paid worker;
- not to do the work of paid staff during industrial disputes;
- to have a job description and agreed working hours;
- to have access to a grievance procedure;
- to be provided with orientation to the organisation;
- to have your confidential and personal information dealt with in accordance with the principles of the Privacy Act 1988; and
- to be provided with sufficient training to do your job.

### Internships and Student engagement

Australian Universities require students enrolled in undergraduate to masters' degrees to obtain experience in professional practice and undertake community engagement. Students are looking for real world experience that is assessed as part of the curriculum and linked to academic results. You can provide this opportunity and approach universities directly. One way to do this is to talk to the convenor or teaching staff responsible for courses associated with history, heritage and the cultural sector and to propose a short term project that fits in with academic semesters. Thinking more broadly students with skills in web design, graphic design and/or communications can also make a contribution to your society activities.



### 5a. Recruitment of Successors

Align the roles with potential successors – from existing members or volunteers. Record whether any external recruitment is required or if you have any other plans for filling the roles.

Urgency	Role	Internal Successor	External Recruitment Required (yes/no)
Immediate (within three months)			
Short Term (within 12 months – two years)			
Long Term (in two years time or beyond)			



## 5b. External Recruitment

Complete the following sections to identify how you will attract, recruit, and welcome potential successors to the organisation. Please complete for your own situation.

<b>Partnerships</b>	In order to recruit these successors the society will form partnerships with the following organisations: <ol style="list-style-type: none"><li>1. <i>(e.g. local Library)</i></li><li>2. <i>(e.g. Local Museum)</i></li><li>3. <i>(e.g. Cultural organisations)</i></li></ol>
<b>Promotion</b>	The following promotional opportunities will be exploited in order to promote membership of and volunteering in our society: <ol style="list-style-type: none"><li>1. <i>(e.g. volunteers expo)</i></li><li>2. <i>(e.g. Society open day)</i></li><li>3.</li><li>4.</li></ol>

<b>Communication</b>	<p>The following communication tools will be employed in the recruitment process:</p> <ol style="list-style-type: none"> <li>1. <i>(e.g. Facebook)</i></li> <li>2. <i>(e.g. Society website)</i></li> <li>3. <i>(e.g. Newsletters)</i></li> <li>4.</li> </ol>
<b>Incentives</b>	<p>The following incentives will be offered for joining our Society:</p> <ol style="list-style-type: none"> <li>1. <i>(e.g. Access to training)</i></li> <li>2. <i>(e.g. Welcoming social environment)</i></li> <li>3.</li> </ol>
<b>Resources</b>	<p>The following resources and support will be allocated to assist with the recruitment of successors:</p> <ol style="list-style-type: none"> <li>1. <i>(e.g. Financial what money can be spent on advertising, events or providing other incentives etc)</i></li> <li>2. <i>(e.g. Facilities/assets what existing Society facilities or assets could be used for recruitment or society promotion etc)</i></li> </ol>

## Step 6 - Induction and Development of Successors

### Screening

Once you have identified avenues for recruitment, it is a good idea to set out a screening process to make sure the people you are recruiting for specific roles are right for your society. 'Right' can have many aspects not limited to skills, but including personality traits and aligning with the purpose of the organisation.

*'Go with the enthusiasm'*

Lee Davey, Member, Queanbeyan & District Historical Museum Society

The succession planning committee will undertake a process to recruit, screen and induct new members and volunteers to decide whether the individual is suited to the particular position within the society. In order to screen new recruits the committee might use the following methods:

- Assessing written applications
- Formal Interviews
- Informal chats
- Checking references

The screening process might also include a working with children check and police check depending on the specific role and the level of risk.

It is important that new members and volunteers understand exactly how their role fits within the 'big picture' of the society. Assigning trial periods for new people is valuable for both the new person coming into the role and the organisation.

Being welcoming and inclusive is important to attract the types of people you want in your society and to bring new energy into the organisation. Develop strategies for how you might do this.

*'Done right volunteering becomes a badge of honour rather than a chore'*

Lorene Long, Museum Curator, Stanthorpe Historical Society and Museum, QLD

### Induction and Successor Development

All new volunteers will be comprehensively inducted into the organisation.

Induction will follow the Induction checklist, which may include:

- Contact details
- Background information on the society
- Code of conduct
- Meeting schedules and member events

Identify who will be responsible for providing orientation to successors and who will support successors' development. Providing ongoing training and development opportunities ensures that successors are improving their skills and knowledge in preparation to take on specific roles within the society. This involves providing members and volunteers with a description of duties and targeting training opportunities where necessary along with the allocation of budget resources.

You might employ the following training and development techniques for successors:

- Training and development opportunities in your area, such as Museums Australia; Oral History Workshops etc.
- A mentor program, where the new person works closely with person with experience in the role (e.g. an experienced researcher working with a new member)
- A buddy system, where the new recruit has a support person who has been with the organisation for some time
- Training courses offered by museums or (e.g. formal training courses like 'Running Your Society: It's Your Business' provided by Museums and Galleries NSW)
- Attendance at workshops, conference or symposia

### Review

A formal review process is useful for both parties. This may take place within the first two to six months or at the end of a specific outcome based project. The succession planning committee may make a report to the President/Vice President for final approval.

It is also useful to evaluate how well the recruitment process itself is working by considering factors such as how long it takes to find a replacement for critical roles and how well the new member or volunteer engages with the role.



## 6. Successors Development Plan

Outline the skills and knowledge to be developed, training and timeline. Complete the table for each new role.  
(The current content is an example only, please complete for your own situation).

Successor Name	Current Position	Future Position	Skills/Knowledge to be Developed	Time Frame	Training/Development Required	Deadline for Delivery	Mentor/Person Responsible
Sarah Anderson	General Member	Vice President	<ul style="list-style-type: none"> <li>• Mentoring by President</li> <li>• Experience in writing reports</li> <li>• Experience in liaison with regional body</li> <li>• Experience in recruiting/attracting new members</li> <li>• Contact details of other members and associated bodies</li> <li>• Confidence level with delegated authority</li> </ul>	1-2 years	<ul style="list-style-type: none"> <li>• Orientation</li> <li>• Assist current Vice President with tasks</li> <li>• Mentoring from current President</li> <li>• Networking opportunities - visiting other societies to share information</li> <li>• Formal introduction at Historical society Committee meeting and opportunity to swap contact details.</li> <li>• Current VP to deliver 'handover notes' with contact information and take opportunity to make informal introductions at events.</li> <li>• Sarah to observe current roles in operations of society eg newsletter; museum; computer data</li> </ul>	<ul style="list-style-type: none"> <li>• Sarah will need to be prepared to take on the new role by the Commencement of 2019</li> <li>• Mentoring from January 2018</li> <li>• Budget for Community museums day at Museums Australia Conference</li> </ul>	<ul style="list-style-type: none"> <li>• Current Vice President</li> <li>• Current President</li> <li>• Historical Society Committee</li> </ul>

## Successors Development Plan

Outline the skills and knowledge to be developed, training and details of the training.

Successor Name	Current Position	Future Position	Skills/Knowledge to be Developed	Time Frame	Training/Development Required	Deadline for Delivery	Mentor/Person Responsible

## Step 7 - Evaluation

Undertaking a succession planning process helps you put a process in place for transfer of knowledge and strategies for dealing with anticipated future situations. The aim is to develop a smooth process for bringing new people into the organisation and to more easily deal with the unexpected.

### Is it working?

You will need to evaluate the impact of the succession plan to see how well the plan is working. Generally speaking this will be the responsibility of the management committee, although the feedback of other members and volunteers should be encouraged. In order to measure the plan's success the following indicators may be used: member turnover; increase in volunteer numbers; informal feedback from volunteers.

### Adapting the plan to changes in the community

Committee members are encouraged to take time to monitor society movements. What changes are taking place in the society that impact on the succession planning process? What other changes are happening in the broader community that may have an impact on member interest now and in the future? Developments in community demographics, changes to council structures and the availability of grants impact on the ability to meet society objectives. Does the succession plan still fit?

### On-going monitoring

The succession plan is designed to be adapted as required for the particular needs of your organisation, regularly reviewed and updated in annual planning meetings. The succession plan could stand as a regular agenda item at committee meetings so that members can discuss the development of members and volunteers and/or other factors that influence society succession planning.

Adjustments will be made to the plan as required in anticipation of, or in response to changes within the historical society and community.



## 7. Evaluation

Is the succession plan working? Evaluate the plan and any changes in the community or the society itself that may impact on the effectiveness of the plan. (the current content is an example only, please complete for your own situation).

<b>Evaluation of the Plan</b>	<p>To check whether the plan is working, it is useful to establish some indicators to measure efficacy. Please identify these measures</p> <ul style="list-style-type: none"><li>• <i>(e.g. are you retaining and growing the membership)</i></li><li>• <i>(e.g. is there increased interest in members taking on leadership roles)</i></li><li>• <i>(e.g. do you have an effective induction process in place for people interested in leadership roles)</i></li><li>• <i>(e.g. is there an increase in satisfaction expressed by members and visitors)</i></li></ul>
<b>Changes in the society</b>	<p>Are there any changes happening in/or to the society that may impact on succession</p> <ul style="list-style-type: none"><li>• <i>(e.g. have you recently attracted new members that are interested in governance)</i></li><li>• <i>(e.g. has a member with important digital skills unexpectedly left the organisation)</i></li><li>• <i>(e.g. have you decided to partner with another organisation for managing the collection)</i></li></ul>

<b>Changes in the community</b>	<p>Are there any changes in the community that may impact on succession</p> <ul style="list-style-type: none"> <li>• (e.g. <i>has there been a change in the local council structure that has affected support</i>)</li> <li>• (e.g. <i>have the rules of association recently changed</i>)</li> </ul>

Congratulations, you have now completed the seven steps of the succession plan.