

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).

Evaluation of the Plan

To check whether the plan is working, it is useful to establish some indicators to measure efficacy. Please identify these measures

- *(e.g. are you retaining and growing the membership)*
- *(e.g. is there increased interest in members taking on leadership roles)*
- *(e.g. do you have an effective induction process in place for people interested in leadership roles)*
- *(e.g. is there an increase in satisfaction expressed by members and visitors)*

Changes in the society

Are there any changes happening in/or to the society that may impact on succession

- *(e.g. have you recently attracted new members that are interested in governance)*
- *(e.g. has a member with important digital skills unexpectedly left the organisation)*
- *(e.g. have you decided to partner with another organisation for managing the collection)*

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

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