**SUCCESSION PLANNING GUIDELINES**

Succession planning is about planning appropriate action for when a person who currently holds a key role in your Organisation moves on, or is no longer available.

Succession planning is also about retaining your current Volunteers, and engaging fresh new faces. There are four key strategies that help ensure effective succession planning:

**Review regularly**

Each year when you are reviewing your Volunteer Action Plan review you key Volunteer roles and ask: *“What would we do if this key Volunteer were to leave?”* Then ask: *“How likely is this?”*

You need to have a plan in place for the circumstances you can foresee and those emergencies that might put your Organisation at risk.

**Develop contingencies**

Consider having a ‘second in charge’ or ‘shadow’ Volunteer for those Volunteers in key roles, so that if they are unavailable for some reason someone else could fill in.

**Plan for successors**

Consider having a formal succession plan for that role in which long-standing Volunteers have indicated they would like to move on. Often Volunteers hold a lot of institutional knowledge in their heads. With the permission of both volunteers ask a newer volunteer to prepare themselves to move into the current Volunteer’s position at the start of a new season. In the meantime explain that it is their role to find out what the person currently in the role does and to document what they know – for their own information and your organisation.

**Capture Iinstitutional knowledge**

Make sure that when a Volunteer leaves everything they know doesn’t walk out the door with them. Document critical policies, proceedures and critical information and keep this information up to date and accessible.