# SUCCESSION PLANNING

# OVERVIEW

An integral part of club sustainability and long-term development is succession planning. Succession planning is a process for identifying and developing new club leaders who can replace old leaders when they leave or retire. Succession planning increases the availability of experienced and capable club volunteers that are prepared to assume leadership roles as they become available.

Sporting clubs typically undertake succession planning for the following reasons:

* Ensure club continuity of people resources
* Mitigate against risk, and potential critical club operational gaps
* Provide pathways for emerging volunteers to assume leadership roles, and remain engaged in the club – long past their playing involvement

Succession planning has several benefits, and may assist in providing sporting clubs with improved strategic viability and ongoing sustainability by proactively addressing:

* Future leadership capability
* Club direction and continuity
* Retention of engaged players and volunteers (particularly family groups)
* Retention of club knowledge and legacy
* Club cultural development

A good succession plan enables smooth transition between new and old leaders, with less likelihood of disruption to club operations. To ensure consistent and smooth succession, sporting clubs should:

* Assess the potential for vacancies in leadership and other key positions.
* Assess the readiness of current volunteers or players to assume these positions.
* Develop strategies to address these needs based on the gaps including mentoring, formal training in leadership and supervisory skills, working with others to navigate the sporting landscape, developing strategies to retain current and potential volunteers, etc.

The importance of succession planning cannot be understated. If you want to see your club continue and thrive, you should be succession planning. As the adage goes; aim to leave the club better than when you arrived.

This club development resource outlines the three steps to ensure consistent and smooth succession and provides tips and tools to do this effectively.

*Please note –* whilst Council aims to provide resources to help direct long-term club sustainability, we also acknowledge there is no ‘one-size-fits-all’ approach to club succession planning. This is due to wide variation in size, purpose, resources, and maturity of each club and the sport itself. The club planning process should be a continual process, rather than compiling documents that once finished, remain on the shelf untouched.

# ASSESS THE POTENTIAL FOR VACANCIES IN LEADERSHIP AND OTHER KEY POSITIONS

The first step in planning consistent and smooth succession is to assess the potential gaps in leadership – both skills and people – as well as other key positions. To do this, clubs can complete a skills audit of current club leaders. A skills audit helps clubs to determine:

* what skills you need (and are missing) to improve club development, are remain sustainable in the future
* what skills you already have in your leadership that contribute to club success
* if there is diversity within the club leadership e.g. gender, cultural diversity etc.

An example of a skills audit (sometimes referred to as a skills matrix) is included below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **What We Want** | **What We Have** | | **What We Need** | **Suitable Candidate? (Consider Diversity)** |
| *General*   * Knowledge of our club system * Knowledge about the volunteer sector * Experience in sport? | Yes | No |  |  |
|  |  |
| *Governance*   * Knowledge and skills in stakeholder relations * Knowledge and skills in governance * Committee/Board experience * Experience in Chairing Meetings * Competence in reading financial reports | Yes | No |  |  |
|  |  |
| *Specialist Skills*   * Legal qualification * Financial Management * Media Skills * Human Relationships * Marketing PR * Risk Management * Strategic Planning | Yes | No |  |  |
|  |  |

*This audit is adapted from the Club Help Website:* [*https://www.clubhelp.org.au/club-resources*](https://www.clubhelp.org.au/club-resources)

Clubs can do the above audit as a focussed succession planning module, or as part of a broader club health-check – which Council would recommend you do at some point within in your strategic planning. To do a full club health-check, clubs can visit Sport Australia and complete one online here using the Sport Australia’s *‘Game Plan’.* <https://www.sportaus.gov.au/club_development>

# DIVERSITY MAKES A DIFFERENCE

When exploring gaps in skills and leadership within your club, it’s also important to consider diverse representation. In this context, diversity can be understood as a person’s unique differences including race, ethnicity, gender, sexual orientation, socio-economic status, age, physical abilities, religious beliefs, political beliefs, or other ideologies etc. So, diverse representation across club leadership is having people from different genders, ethnicities, religious beliefs, ages and so forth.

Some of the benefits of having diverse representation of people and communities across your club leadership include:

* New ideas and ways of knowing/doing are introduced to the club
* New cohorts and volunteers are introduced to the club
* Quicker decision-making and ability to resolve problems faster
* Improved risk-mitigation; different perspectives identify different risks
* Potential to influence revenue-growth, through new sponsorship or fundraising networks

**WHAT’S NEXT?**

Once clubs have assessed the potential gaps in leadership – both skills and people – as well as other key positions, it’s important to progress into the next stage of succession planning; assessing the readiness of current volunteers or players to assume leadership positions.

# ACCESSING THE READINESS OF CURRENT VOLUNTEERS OR PLAYERS TO ASSUME POSITIONS

Now you’re aware of the skills gaps within your club’s leadership, it’s important to assess who within your club currently, could fill these gaps. This doesn’t mean they have to be skilled to your clubs needs immediately or be an existing leader (defined as a decision-maker) within your club; they could be a player or game-volunteer. Whether it’s a current or potential leader, it’s important to assess their readiness to assume senior leadership positions for future succession. A quick way to do this is by using a nine-box grid model.

The nine-box grid is best used as a collaborative exercise where club leadership teams (usually club Boards or Committees) come together to position volunteers and/or players on the grid. Once completed, the nine-box grid helps you plan the progression of each person, to map out your club’s future leadership. Below is an example of what a nine-box grid looks like.

|  |  |  |  |
| --- | --- | --- | --- |
| **Potential Axis** | High Potential, Low Performer | Moderate Performer, Moderate Potential | High Performer, High Potential |
| Moderate Potential, Low Performer | Moderate Performer, Moderate Potential | High Performer, Moderate Potential |
| Low Performer, Low Potential | Moderate Performer, Low Potential | High Performer, Low Potential |
| **Performance Axis** | | |

Within the nine-box grid you’ll notice blue and yellow highlights,

* Blue categories - are those who your club should (in the first instance) invest in development – to assume future leadership and succession.
* Yellow categories - are those who work well at what they are doing and should be considered for development second to the blue mapped categories and,
* Colourless categories - are not ready for future leadership positions.

As you assess your volunteers, it’s important to remember that there’s a difference between potential and readiness. For example, Michael may have the potential to become a super star Club President but isn’t quite ready to move into that role yet.

**WHAT’S NEXT?**

Once you’ve assessed the readiness of current volunteers or players to succeed, it’s integral to provide them with the skills and knowledge to assume club leadership. This development could include mentoring, formal training in leadership and supervisory skills, working with others to navigate the sporting landscape, developing strategies to retain current and potential volunteers, etc.

# DEVELOPING INDIVIDUALS FOR SUCCESSION

The final step in succession planning – other than succession itself – is developing those individuals who are earmarked to succeed your leadership, with the skills and resources they need to effectively lead. This is the most important step of succession planning, and often the most neglected. When we invest in developing an individual to be a leader, we invest in the future sustainability of our sporting club.

At this stage of succession planning, you should be aware of both your club’s organisational needs, and those the individual will require to develop to meet your club’s needs. A straightforward way of developing an individual to assume leadership is by creating a development plan with them. Development plans should be designed around S.M.A.R.T (specific, measurable, achievable, relevant, and time-bound) goals. It’s much more difficult to measure someone’s progress (and readiness) when the objectives are vague, overly broad

or don’t have a deadline. Additionally, make sure the individual is aware of what and how they need to develop to assume leadership at your sporting club.

Development plans look different for everyone. Plans could include things like mentoring, formal training in leadership and supervisory skills, working with others to navigate the sporting landscape, developing strategies to retain current and potential volunteers, etc. Ultimately, development plans should focus on building the skills and knowledge of individuals to assume leadership – and are personalised for that reason. Below is a simple template to create a development plan (with two examples).

|  |  |  |  |
| --- | --- | --- | --- |
| **Action** | **Club Organisational Need** | **Individual Need** | **Deadline** |
| *Attend a Sport Community Webinar on Secretarial Administration* | *Sound club governance and clear, transparent record-keeping* | *Need to improve understanding of a Club Secretary role* | *12/12/23* |
| *Undergo monthly mentoring from current Club Secretary* | *Sound club governance and clear, transparent record-keeping* | *Need to enhance secretarial skills and current Club Secretary projects* | *Monthly ending -12/12/23* |

**TIPS FOR CREATING DEVELOPMENT PLANS**

* This is a volunteer role; make sure the development plan is simple, clear and won’t require the individual to take on too much additional work or time.
* Make sure the development plan considers your club business/strategic goals, and how this development will contribute to these goals being achieved in future.
* Talk to the individual about their development plan.
* Consider investing in paid development opportunities, especially if your current leaders don’t have the time or skills to develop this individual.
* Manage your expectations! It is unlikely new leaders will have the same experience or knowledge as your current leaders. This knowledge takes time to learn, and if you expect everyone who joins your club’s leadership to have this knowledge, you will severely limit your talent pool.
* Consider how the individual likes to learn, and tailor their development plans to their preferred learning styles.

**WHAT’S NEXT?**

It’s important to remember your sporting club is spending a considerable amount of time and (possibly) money on helping club members to improve their skills. To get your greatest possible return on investment, future leaders need to be able to put their new skills to work before they assume leadership.

Set up some opportunities where they can quickly apply their new skills and get feedback from current leaders. This will help reinforce and refine their new skills, within the safety net of the current club structure. Once they’re demonstrating competence, it’s time to step back and hand over the reins!

# QUICK TIPS FOR SUCCESSION PLANNING

*These quick tips are adapted from the Club Help Website:* [*https://www.clubhelp.org.au/club-resources*](https://www.clubhelp.org.au/club-resources)

Clubs report that it is increasingly difficult to attract volunteers to Committee roles. The following are strategies that you could try to enhance your committee succession and to make Committee roles more attractive.

* Keep ahead of your committee needs both in terms of numbers, balance and the skills you will need. This means recruitment can be planned rather than rushed.
* Recruit well in advance, even if this means through personal approach.
* Establish fixed terms for Committee Members. This means recruits do not have to fear getting stuck. Alternatively, this could also take the form of a rotation system.
* Establish a hand-over process for incoming Committee Members so they feel supported and have a clear understanding of the role.
* Ensure clear delineation between governance requirements and the operational tasks associated with running your Club. Distribute operational tasks to general volunteers or Working Groups so that Committee members can focus on governance alone.
* Develop detailed role descriptions outlining the specific requirements for each position so recruits know what they are committing to e.g. attend one evening meeting on the first Wednesday of each month (two hours).
* In developing the list of tasks associated with a position, identify opportunities to reduce the demands by splitting roles or redistributing tasks to general volunteers or working groups.
* Minimize evening meeting requirements where possible. Develop a realistic calendar of meetings aligned to governance requirements and consider alternative methods of ongoing Committee dialogue which is less demanding.
* Adhere to good meeting practices so that meetings are productive, efficient and don’t go too late!
* Publicly promote and recognise the Committee and the roles they play through the newsletters, notice boards, Club functions etc.
* Sell the merits of being on the Committee e.g. learning new skills, being a pivotal part of the Club, networking, CV item, opportunity to support the development of the Club etc.

# CONCLUSION

Succession planning has the potential to set your sporting club up for long-term sustainability and success. However, it’s important to remember that succession planning is not a once-off endeavour, or something that can be put aside and returned to later. For a seamless transition between old leaders and new successors, it takes an ongoing and continued investment in your clubs’ people – particularly those volunteers who are engaged in club-decision making, not only for the betterment of themselves but also the continued legacy of their club.