

Succession Planning for DCs

From Volunteering Tasmania

<https://volunteeringtas.org.au/wp-content/uploads/2025/02/Resource-6-Succession-planning.pdf>

Summary

To plan for succession in a voluntary organisation, identify critical leadership and operational roles, document essential tasks and procedures, and cultivate internal talent through mentoring and shadowing. Implement clear term limits and create assistant roles to build a steady transition pipeline.

Identify Critical Roles and Skills

- List core positions that keep the group running, such as the president, treasurer, secretary, or key project coordinators.
- Write clear, simple job descriptions that outline tasks, required skills, and expected time commitments.
- Note term limits so leadership changes happen on a predictable schedule rather than as a surprise

Document Knowledge and Processes

- Record step-by-step guides for routine tasks, financial workflows, and event planning.
- Save all important documents, templates, and files in a shared organizational cloud drive rather than on personal computers.
- Maintain a secure master list of account logins, software subscriptions, and key external contacts.
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Cultivate Future Leaders

- Look for engaged members who show interest and invite them to shadow current leaders.
- Create deputy or assistant roles (like vice-president or assistant treasurer) to let potential successors learn by doing.
- Pair new or prospective volunteers with experienced mentors for guidance and support.

Manage the Transition

- Allow an overlap period where the outgoing volunteer works alongside the new recruit.
- Conduct a friendly handover meeting to review open projects, shared goals, and key contacts.
- Review and update the succession plan annually to account for changes in people and technology

From Institute of Community Directors

<https://www.communitydirectors.com.au/help-sheets/10-questions-succession>

Succession planning is about much more than just replacing board members when they leave. It is about planning recruitment, induction and retention so that you can deal with changes in personnel without destabilising the overall governance of your organisation. Indeed, in a healthy organisation, succession planning is part of a continual process of reviewing, renewing and revitalising the organisation. In this respect, good succession planning is about the healthy maintenance and handover of collective wisdom, and it thereby ensures the continuity and evolution of organisational knowledge and purpose.

In working through the following 10 questions, you will see that board succession can't be considered in isolation; it should be part of an overall process of creating healthy board structures in order that you can focus on the fun bit – delivering on the important purpose of your organisation. Good luck with finding great people for your board.

1. Do we have a succession plan?
2. Does our board reflect the community it serves?
3. Why are people resigning from the board?
4. Have we got the right mix of people and skills on our board to achieve our strategic goals?
5. What will we do if our chair/treasurer/secretary retires?
6. Are our roles clearly defined and delineated?
7. What's our strategy for finding board candidates?
8. What does a prospective board member need to know?
9. Do we have a solid induction process?
10. Are our board meetings effective and well run?

<https://www.communitydirectors.com.au/help-sheets/recruiting-new-board-members>

There are a number of ways you can encourage others to get involved in your group:

- Advertise the fact you are looking for potential new board members
- Hold information days, where others can learn about your group
- Run publicity campaigns in local papers
- Hold open days at your group's headquarters
- Send newsletters to members/clients and other interested individuals or groups
- Word of mouth is a very powerful marketing tool – tell your friends about your group
- Distribute brochures about the group

From conversation at Convenors' meeting 10 September 2026

Additional ideas and comments suggested to help meetings run well and therefore make it easier to recruit leaders:

- Recognise that some people are talkers and some are listeners
- Have a joint session with another DC, e.g. Vic-Tas + Convicts & Transportation for a speaker
- Having set the scene with a general appeal at a DC meeting for volunteers, then personally approach an individual with the invitation to help out
- Make more use of hybrid meetings, note best if convenor is present in the room where other gather
- Begin a conversation with a question so as give opportunity to interact early in a meeting or discussion
- Some prefer questions to a speaker at the end of a presentation so as to minimise interruption, others prefer them during the presentation so as to facilitate more interaction and to deal with a matter when it first arises
- Not all meetings should have a presentation, some can have a general discussion on a topic or with brick walls
- People who live in a similar area could come together for a coffee at a time of their choosing, e.g. Croydon, SE suburbs, Castlemaine; or maybe in the city having some time in the GSV library too; maybe arranged on WhatsApp