

VOLUNTEER

Club Succession Planning Guidance

This guide is for club volunteers looking to safeguard the future of their club by having a sustainable succession plan in place. Use the advice and guidance within working with your committee to review your current situation and plan ahead.



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INTRODUCTION TO SUCCESSION PLANNING

Volunteers are your Club's greatest asset. You want to attract and retain the best and plan for the future, on the understanding that good people will come and go.

Succession planning allows you to be pro-active in identifying potential successors to key roles on your committees. Taking the time to identify skills or expertise needed can help you work with volunteers to develop their knowledge and understanding in advance of taking on a key role.

Equipping people with the tools to take on a role if someone has to step down, rather than simply naming them as replacements and leaving them to get on with it, can help to ensure your Club has the right volunteers with the right skills, in the right positions, at the right time.

This toolkit is a resource for Club Leaders and Committee members. The aim is to provide you with the tools to implement succession planning effectively and overcome barriers whether you have no plan in place, or wish to update current succession plans. The tools can be applied differently, based on the collective and individual expertise, talent, resources and development plans.

An organisation will be more sustainable and successful, and more able to provide on-going support to its members, if it is prepared for the departure of an executive



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BENEFITS OF SUCCESSION PLANNING

Having a succession plan gives a clear direction of travel for future volunteer recruitment and retention. It helps ensure continuity for your committee and can mitigate the risk of losing knowledge and expertise when a volunteer steps down or leaves their role.

The following are identified key benefits of having a robust succession plan in place:



POTENTIAL CHALLENGES TO SUCCESSION PLANNING

Having a succession plan in place for your committee might be a change to how things have been done before, or previous approaches to recruitment. It is worth bearing this in mind when trying to put a new or updated succession plan in place. Additionally, challenges may be:

- Too much administration or work for volunteers
- “Traditional” views might hold the club back or perhaps not all committee members are on board with the succession planning process
- Your recruitment process must be transparent
- Club politics, egos and personalities might make the process more difficult
- Fear of change or club culture
- Limited resource or development opportunities for new volunteers
- Limited volunteer base or potential volunteer base to recruit from

STEP 1 - APPOINT SOMEONE TO LEAD THE PROCESS

It is recommended that a Succession Manager (preferably independent) be appointed by your Club to lead the process, reporting to the Committee (see guideline Succession Manager Role description, page 12)

To be most successful, appoint an independent person, who is not a current member of the Committee, to instigate and lead an objective review of the current situation and encourage 'buy in' to the process from other Committee Members.

Following an initial review of current situation, consider embedding Succession Planning into your Committee

After following the initial succession planning process, encourage the Committee to take responsibility for the future of the club and actively looking for and developing successors, to help relieve the pressure on one Succession Manager.

Having all the committee involved will help spread the workload and embed a structured approach to succession with is everyone's responsibility.



STEP 2 - ASSESS CURRENT POSITION WITHIN YOUR CLUB

The Succession Manager should speak with all current role holders for an initial conversation about their role on the Committee.

It is important not to skip this step. It is a vital part of the process of creating an atmosphere of openness and transparency within your Committee, breaking down barriers and getting some valuable information back, which will all help and support the succession planning process.

Base this conversation around five standard questions:

1. How long have you been in your current position?
2. How long do you plan to be in the role? Do you have any plans to step down imminently?
3. Is there any other position in the Committee you would like to take on?
4. Do you have aspirations for your volunteering and a timescale for achieving them?
5. How disappointed would you be if you did not achieve your aspirations?

Consider also:

- What are the three key objectives for your role?
- What skills are required to be successful?
- What previous experience or knowledge is needed to be successful in this role?

Year 1 onwards

On gathering this basic information for current role holders, use the Succession Planning Matrix on page 15 to keep on top of the current situation and prepare for the future.



STEP 3 - PRESENT FINDINGS TO EXECUTIVE COMMITTEE FOR DISCUSSION

Having completed the review of the current situation within the Committee, the Succession Manager will now be in a position to collate the information gathered and present their findings to all Committee members for discussion.

It is recommended that the findings be presented in the form of a short report – no longer than two sides of A4.

The report, together with the Succession Planning Matrix (page 15), can be used as basis for developing short (1-2 year) and term (3-5 year) succession plans for the Club.



STEP 4 - DEVELOPING A TALENT POOL

In order for Succession Planning to be possible, the Club needs to identify and support people with their volunteering development. This will help potential leaders feel more ready to take on a committee role.

An interim step in this process could be the identification of key areas that need volunteers – i.e. what do you need people to help with.

This could be projects in areas such as:

- Better structures and processes
- Better communications and marketing
- Better financial planning
- Better engagement with volunteers / members
- Better fundraising

By getting people involved in specific areas and familiarising them gradually with the running of the club, you will start to develop a group of potential Leaders.

Identification of potential club volunteers and future leaders happens through:

- Enthusiastic parents of mini or youth players. Those who are often at the club for training and matches.
- Players who have been around the club for a long time and are invested in its successes.
- Reviewing volunteers who have received Recognition and Reward – could their volunteering move into the committee?
- Young people, or Young Rugby Ambassadors, who have demonstrated an interest in the club and developing themselves.

When it comes to starting your recruitment to support your succession plan, a more strategic approach is needed compared to general volunteer recruitment. Consider:

- Where have your most successful volunteers come from?
- What kind of volunteers will your club need in 5-10 years' time?
- Are there young people in your club who would benefit from volunteer development?
- How broad and inclusive is your search for volunteers?
- Have you considered fixed term roles for key committee positions?

The RFU Leadership Academy, offers opportunities for Leadership Development to the next generation of club, Constituent Body and referee society leaders. It provides a structured, practical and methodical approach to learning, which aims to help people develop their rugby expertise and confidence, while facilitating networking opportunities to allow delegates to share experiences and solutions to handle similar issues.

STEP 5 - ADVERTISE ROLES WIDELY – USE WEBSITES, SOCIAL MEDIA AND WORD OF MOUTH

Given the responsibilities of Committee roles, it is good practice to follow an open recruitment process but ultimately this decision will be at the discretion of the individual Club.

Producing the advert

The next step is to produce an advert for the vacancy. Advertising a volunteering role is different to advertising a paid position.

Make sure the advert contains a cut-off date, approximate interview date and proposed start date.

Read our ‘Top Tips for advertising a volunteering opportunity’ page 18.

Through completion of the previous steps, and referral to the Succession Planning Matrix, it should become possible to identify when roles will require a successor, at least one year in advance. Even if a potential successor has been identified, it is good practice to advertise the upcoming vacancy widely to raise awareness of volunteer needs. This approach will ensure transparency, accountability and embed the correct procedures as standard practice going forwards.

Before advertising the position, select an appropriate mentor to assist with Induction of the new role holder – preferably the current incumbent if appropriate and if the handover period allows. Identify at least two people with appropriate skills to:

1. Review the role description, to ensure it accurately reflects the requirements of the role.
2. Write the advertisement
3. Assess the applications, short-list and ‘interview’ candidates

Supporting Documentation

- Volunteer Role Description – key relationships and core responsibilities
- Expression of interest form – previous experience, time available, contact details.
- ‘Interview’ questions. We don’t suggest for club roles you have a formal interview but it’s worth having a chat with a potential volunteer on role requirements and expectations (theirs and the club’s) position.

It is important the advert:

- a) makes the role sound as interesting as possible
- b) is explicit about the skills and expertise required to successfully fulfil the role, and the responsibilities
- c) highlights the benefits of taking on the voluntary position

Select appropriate advertising media e.g. Club and CB websites, newsletters, social media, online volunteer recruitment platforms such as <https://do-it.org/>

STEP 6 – MEET WITH POTENTIAL NEW RECRUITS AND APPOINT WHERE APPROPRIATE

Interview and Selection process

Given the responsibilities of Committee roles, it is reasonable to hold an informal ‘interview’ process but ultimately this decision will be at the discretion of your Club.

Recommended good practice:

- Should you have a number of applicants, at least two people should process these and consider suitability.
- If interviewing, allocate questions between two committee members, review role description and expectations.
- Check if applicants has a disability, which may require any “reasonable adjustments” to carry out the role.
- Conduct informal interviews and keep a written record.
- Inform candidates when they will receive a decision.
- Select.

Appointment

- Conduct due diligence and take up references if applicable
- Confirm appointment to the role
- If numerous applicants were received, is there an opportunity to split the role?
- How can you keep other, keen volunteers involved if not selected for this role? What else can you offer?



STEP 7 - INDUCTION OF NEW OFFICERS

Help a new Committee officer by providing an informative and supportive induction. There are a number of steps to take to help make the transition into a new role easier:

- Appoint a mentor for the new officer
- Agree a mutually convenient start date for the new officer and, if possible, arrange a programme of 'shadowing' the current officer.
- Provide future meeting schedules.
- Arrange meetings with the key Committee members to discuss and agree targets and goals.
- After an initial induction period, agree official takeover date with new officer.

Training and Development for new volunteers

Ensuring new volunteers are equipped to do their role, or if they are in line to take on a leadership role, helping them to be prepared is a key part of succession planning. Here are a few things to bear in mind when planning training and development:

- Does the training need to be formal or informal?
- Can other club members provide informal training?
- Is shadowing or a buddy system sufficient for a new volunteer to learn their role?
- Would a project-based approach help volunteers become acquainted with the inner workings of the committee?
- Undertaking team building or social events helps volunteers to bond and learn about each other's roles.
- Providing mentoring / coaching helps volunteers understand their development needs and how to progress.



APPENDIX 1 - SUCCESSION PLANNING MANAGER

Role descriptions are for guidance only; additions/adaptions may be needed to meet your Club's requirements.

- The appointment of the Succession Planning Manager, reporting into the Committee, is for one/two years initially, with a rolling tenure thereafter

Purpose:

To review current procedures and produce short and long terms succession management plans, linked to the strategic/business plan, ensuring that role descriptions/terms of reference with clear objectives are created for each post and are reviewed on an annual basis.

Key aspects of the role:

1. Comprehensive review of current position

Take the lead on reviewing the current situation within the Committee:

- Identify current role holders and length of tenure to date
- How many additional roles (if any) they hold?
- Any gaps?
- Development needs/aspirations
- Whether they are considering stepping down/moving on – and when
- Has a successor been identified?
- How are successors currently recruited and is recruitment open and transparent
- Induction processes currently in existence

2. Development of resources or signposting

In order to support skills development for existing Committee members and the identification/recruitment and induction of successors, use information from review to create appropriate role descriptions and induction information and signpost as appropriate to online training resources.

3. Creation of short and long term volunteer succession plans

Create short (1 year) and long term (3-5 year) plans, linked to the club's development plan.

4. Communications with stakeholders – development of a 'talent pool'

Use appropriate resources to promote volunteer opportunities to members. Working with the Club Volunteer Coordinator, promote and encourage engagement in RFU initiatives and opportunities including the Leadership Academy, to support the identification of potential volunteers from clubs to become involved in committee roles and CB roles in the future.

Experience, Knowledge, Skills and competencies required:

- Sound knowledge/understanding of board structures and roles
- Well-organised with accurate and efficient IT and administration skills
- Confident leader with good communication/interpersonal skills
- Interested in volunteer management/development
- Well-connected to clubs or willing to develop relationships

APPENDIX 2 - SUCCESSION PLANNING - SKILLS AND REQUIREMENTS TEMPLATE

Use this template to detail each position for which succession planning is required.

Please note this template is for guidance only. Please adapt/add to this basic information to ensure it is relevant to your Club's requirements.

| POSITION DETAILS | |
|--|--|
| Role e.g. Chairperson | |
| Current role holders | |
| Appointed (date) | |
| In role until | |
| Legal requirements of the role | |
| Skills/training required for role | |
| Personal skills and attributes required | |
| Ideal handover period (minimum 3 months) | |

| PERSONAL NOTES | |
|--|--|
| Any other club role they would like to undertake | |
| Skills/training required for role | |
| Personal skills and attributes required | |
| Ultimate aspirations within Rugby | |

APPENDIX 3 - SUCCESSION PLANNING MATRIX

Status:

A: Change likely within 1 year

B: Change likely within 3 years

C: Change likely within 5 years

D: Change status unknown.

Criticality:

1: Critical - must "hit the ground running"

2: Very Important - fully functional within 6 months

3: Less Important - time to train/mentor & induct fully

| Role | Current Holder | Previous Roles | Status | Criticality | Volunteer ready for role... | | Priority |
|---------------------------------|----------------|----------------|--------|-------------|-----------------------------|--------------|----------|
| | | | | | Now | In 1-2 Years | |
| President & Vice President | | | | | | | |
| Honorary Chair | | | | | | | |
| Honorary Secretary | | | | | | | |
| Honorary Treasurer | | | | | | | |
| Membership Secretary | | | | | | | |
| Fixtures Secretary | | | | | | | |
| Discipline Secretary | | | | | | | |
| Safeguarding Officer | | | | | | | |
| Club Coaching Coordinator | | | | | | | |
| Club Referee Coordinator | | | | | | | |
| Club Volunteer Coordinator | | | | | | | |
| Mini and/or Youth Chair | | | | | | | |
| Women & Girls' Chair | | | | | | | |
| Junior Girls' Coordinator | | | | | | | |
| Commercial Manager | | | | | | | |
| Marketing & Sponsorship Manager | | | | | | | |
| Grants Manager | | | | | | | |
| Fundraising Manager | | | | | | | |
| Event Manager | | | | | | | |
| International Tickets Contact | | | | | | | |
| Merchandise Manager | | | | | | | |
| Grounds Manager | | | | | | | |

| Role | Current Holder | Previous Roles | Status | Criticality | Volunteer ready for role... | | Priority |
|--|----------------|----------------|--------|-------------|-----------------------------|--------------|----------|
| | | | | | Now | In 1-2 Years | |
| Buildings Manager | | | | | | | |
| Health, Safety & Environment | | | | | | | |
| Bar Manager | | | | | | | |
| Catering Manager | | | | | | | |
| Communications & PR Manager | | | | | | | |
| Webmaster | | | | | | | |
| Director of Rugby | | | | | | | |
| Coach | | | | | | | |
| Colts Coach | | | | | | | |
| Club Captain | | | | | | | |
| 2nd XV Captain | | | | | | | |
| 3rd XV Captain | | | | | | | |
| 4th XV Captain | | | | | | | |
| Vets Captain | | | | | | | |
| Equipment manager | | | | | | | |
| First Aid Officer | | | | | | | |
| Player Registrar | | | | | | | |
| School/College/Uni Liaison | | | | | | | |
| Seal of Approval Accreditation Manager | | | | | | | |
| Social Secretary | | | | | | | |
| Team Manager | | | | | | | |
| Tour Manager | | | | | | | |
| Transport Manager | | | | | | | |
| County Representative | | | | | | | |
| Archivist | | | | | | | |

| Role | Current Holder | Previous Roles | Status | Criticality | Volunteer ready for role... | | Priority |
|--|----------------|----------------|--------|-------------|-----------------------------|--------------|----------|
| | | | | | Now | In 1-2 Years | |
| Women and Girls Section - Coaches | | | | | | | |
| Women's Coach | | | | | | | |
| U18s Girls | | | | | | | |
| U15s Girls | | | | | | | |
| U13s Girls | | | | | | | |
| Youth Section - Coaches | | | | | | | |
| Under 17s | | | | | | | |
| Under 16s | | | | | | | |
| Under 15s | | | | | | | |
| Under 14s | | | | | | | |
| Under 13s | | | | | | | |
| Under 12s | | | | | | | |
| Minis Section - Coaches | | | | | | | |
| Under 11s | | | | | | | |
| Under 10s | | | | | | | |
| Under 9s | | | | | | | |
| Under 8s | | | | | | | |
| Under 7s | | | | | | | |



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APPENDIX 5 - TOP TIPS FOR ADVERTISING A VOLUNTEERING OPPORTUNITY

This is a great opportunity to ‘sell’ the benefits of taking on a role within your club

- If possible, use an interesting title for the opportunity – make it eye-catching
- Make sure you provide a good outline of what the role will involve
- Limit the number of words to a maximum of 150
- Don’t be afraid to be explicit about the level of responsibility involved
- Either use bullet points or break the text up into sections, each with a heading, so it’s easier to read
- Avoid jargon and acronyms
- Use capitals sparingly - THERE IS NO NEED TO SHOUT in your title or role descriptions
- Remember you want to give the impression that your club is welcoming and friendly
- It is important to look professional to prospective volunteers, so always check your spelling and grammar!

If possible, assure potential volunteers that a structure is in place to support them while they become familiar with how the club works and that training is provided if applicable.

CASE STUDY

An advert on the Yorkshire RFU website recruited Lead CB Volunteer Coordinator Sally Burns in 2016. Sally already had a background in volunteer engagement through her role as Director of Communities and Neighbourhoods with the City of York Council and had developed an interest in rugby as a mum supporting her sons various teams at club and school.

Having read the CBVC role description online, it sounded like something she would be interested in getting involved in. After a telephone interview, Sally officially took on the role in March 2016.

Over the past 18 months, Sally has strengthened volunteer engagement across Yorkshire and has appointed district Volunteer Co-ordinators who liaise with her to cover the whole CB area. Volunteer Awards in the districts were already established and Sally worked with a team of enthusiastic volunteers to establish the inaugural Yorkshire Rugby Volunteer Awards, which took place on Saturday 27th May 2017 in the Great Hall, Leeds Beckett University. These were very well-supported and it’s fair to say that Sally has taken recognition of volunteer achievements in the CB to a whole new level.

Sally said, “I have a great volunteer coordinator support team and feel there is so much more we can do in Yorkshire to engage without our 121 clubs and thousands of amazing volunteers. I have thoroughly enjoyed the role so far!”