



BGA CLUB MANAGEMENT GUIDES

Succession Planning, Orientation and Handovers

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Picture the scene, a club member is receiving a token of appreciation at the club AGM. Next week they begin a long overdue 12 week trip to Australia to see family. This is the first time they have been publicly thanked for their contribution to keeping the club operations running smoothly, even though they've been in their role for twenty years. They have been expressing a wish to stand down for the last decade, but it is only now that someone with enough time and energy has come forward to take on the role. In a couple of weeks' time, this new person will have some specific questions about how to do something, and they won't know where the relevant information and knowledge is kept.

Does this sound familiar in any way?

Developing some notes and handover processes brings many benefits, not least in that people understand what they will be committing to. If it forms part of wider support for volunteers, they can also be confident that their contribution will be appreciated and supported.

When it comes to committee roles, there are good practices around the maximum length of time anyone serves, for instance Sport England recommends a maximum of 9 years. Some governing documents will set out maxima.

Succession Planning

Broadly, there are two approaches:

- create a lineage and ensuring the successor is a clone;
- create attractive conditions so that a diverse range of people feel confident about what they are taking on and know that they will be well supported as they settle in.

In practice there is probably a blend of both approaches, but the thing to be wary about is that in seeking a worthy successor, someone in a post is likely to find somebody who is 'like' them, or worse, part of a clique, which can make a club and the Board or Committee feel rather exclusive. At the very least, this reduces the opportunity for fresh thinking and fresh experience to be brought into the decision making processes of a club, even if the role is, for instance, a maintenance role – decisions will be being made about how things happen in the club.

There is an added advantage about the 'attractive conditions' route because it mitigates risk – should someone suddenly need to step back from their role the information about the role is already there to be picked up in a hurry by somebody else.

Given that a gliding club is a naturally small pool, what can we do about creating more attractive conditions? In short, we're talking about defined roles & responsibilities, handover notes and orientation. Some funders require these to be in place before they will award a grant.

Handovers

What information does someone need to know about a role?

Firstly: what it is; the extent of the responsibilities; the level of commitment required.

In addition to the core, regular duties and responsibilities, some information about *how* things are made to happen, key roles and people who are valuable in making healthy

progress. Creating a set of notes that cover those points, even if only brief, will be invaluable. Add to these core notes:

- what's currently on the go – probably covered by recent minutes of meetings
- files that have been created (with some sort of navigation aid)
- a handover meeting
- availability for queries for a period of time after they begin the role

and the person stepping into a role will swiftly be able to gain a good understanding.

Mitigating risk

If people have created the core notes AND make sure that at least one other person has been shown what's what and where it is all kept, then should someone be called away to take care of something important such as a family illness, then all this frankly un-important stuff can be handed over with minimal fuss, relieving stress and responsibility quickly.

There should be information about the roles and key structures in a club – for instance foibles in the maintenance workshops and how to run specific admin processes e.g. CASC, if your club has CASC status.

Orientation

Making it generally known that there are proactive orientation and handover processes in place will help create a healthy volunteering culture in your club, which will expand the potential candidates.

Why good orientation (or induction) matters

It increases the amount of difference our organisations can make in a given period of time.

There is an aspect of the voluntary sector that is deeply disappointing: the length of time it takes for someone to settle into a new role or a new organisation. Let's not forget that this is probably someone who comes with lots of skills, knowledge, expertise and experience. They could well be highly successful in their day job and have great self-confidence in another sector. Or they bring energy, enthusiasm, and a deep passion for your work. Or both.

When joining a non-profit organisation, it can take up to 6 meetings to feel comfortable in a role – how frequently does your club board or committee meet? In the time that they're not feeling comfortable they are not contributing the very skills and experience that they are supposed to be bringing to that role. Usually, they simply don't want to get 'it' wrong, because they perceive that the stakes are higher (and resources scarce) in a non-profit organisation.

Many of these roles only last for three years anyway, so without adequate support we're potentially losing half of the full contribution that people could be making. Realistically there will always be a bit of a lag period while somebody settles in and listens to what is going on. This is a healthy thing – no organisation needs a new person on a personal crusade crashing across all the existing work... but this initial period should be comfortably short.

What can we do to support this process?

- A handover meeting between role holders
- A 'meet' series – especially if there are staff and premises to get to know
- An orientation pack – reference information to refer to

Looking at what we already achieve with our gliding clubs, just imagine what collectively we could do and what would be possible if we didn't lose all unnecessary time.

3 Steps to Great Orientation

Step 1- Establish the purpose of the pack

Who is this orientation pack for and what are they new to: is it the role; the organisation; or both?

Step 2 – Build it

What information needs to be created? There's a list of suggestion below. Gather all the relevant documents and links, put them on file so that they're ready for when needed.

What should be in an orientation pack?

On the next page is an ideal list, based on an induction pack for new Trustees of a charity.

Your club might not have all these items but should try to include relevant information.

Have a look at the list and work with what's possible (and sustainable) for your club.

For instance, the 'impact report' which is a combination of stories about people who have benefitted and statistics about the activity that leads to creating the impact. I don't know of any clubs that currently produce one, but you probably have something that covers the difference your club makes for people. This sort of information is also very useful for funding bids, local PR campaigns and the club's social media posts.

Step 3 – Use it!

When preparing to welcome someone new, review the pack and update with the most recent information. Remember to let existing volunteers and staff know about updates – it's good to occasionally remind people.

As well as sending an orientation pack electronically, consider sending it as a hard copy with a welcome card as part of your warm welcome.

An 'ideal' induction pack

Organisation

1. Introduction to your organisation, including purpose and scope of the organisation
2. A copy of the most recent newsletter
3. Forthcoming events and socials
4. Annual report – probably what was presented at the last AGM
5. Impact report – as summary of the difference your club makes for people each year
6. Current plans (strategy, delivery, sports club etc)
7. The Governing document and information on where to find policy documents
8. General information:
 - Organisation charts if applicable
 - Organisation of the Board/Committee
 - Details of fellow Directors/Committee members
 - Contact list
 - Key locations of files and documents
9. Information about being a Director/Committee in this organisation:
 - Risks and responsibilities
 - Code of conduct
 - Interests
 - Who to turn to for support, advice, queries
10. Schedule of meetings

Role

1. Role description, including scope
2. Key people and roles associated with that role
3. Handover notes:
 - Current plans
 - Key dates & tasks
 - Recent activities

Discussion points from the ‘Successful Succession’ Monday evening Club Development Session

A 20 minute video of the presentation made at Successful Succession on Monday 26 September 2022 has been shared in the ‘Club Development Conference Publications’ Dropbox folder. If you need access to these materials please contact the BGA Development Officer for a link.

In the discussion following the presentation, club volunteers made the following useful points

Deputies

Having deputies for every role helps to reduce risk for clubs, should someone need to step back in a hurry. Many clubs have more than one deputy CFI, creating a small leadership team, each taking responsibility for different areas of pilot development in the club.

However, a person well suited to being a deputy does not always suit stepping up to fill the main role permanently and making sure that people are in roles that suit them is a part of good quality succession planning.

University clubs

If your club has one, you will notice the naturally high turnover of members and people in named roles. As a result, Uni clubs often have great succession processes in place, many of which could be adapted.

Ways to increase capacity

Making it easier to join in and breaking roles down into manageable pieces

Being flexible with meeting times and places to be inclusive

Praise & appreciation

Personal development and the opportunity to learn new skills – great benefits for the individual, something which also could do with wider appreciation.

Impact – capturing the stories of volunteers’ experiences is great for all sorts of club communications, including encouraging more people to get involved.

Variety of people involved – we often take this for granted but this should be celebrated – our clubs are remarkable.

Documents

Shared drives & clouds make a big difference and mean that information does not need to be stored on personal equipment.

An opportunity to do things differently

Working strategically and monitoring organisational drift – does the role as it is currently structured suit club member need and club purpose? A change of personnel can be an opportunity to review the role and adapt it to better suit the wider need.