



Succession Planning Policy

Policy Name	Succession Planning Policy
Approved By	Gym West Management Committee
Policy Coverage	Coaches, Staff, Volunteers
Date of Approval	May 2019
Date of Review	May 2021

Policy Statement

Gym West (GW) is committed to ensuring the club's success by identifying, recruiting, retaining, valuing and developing employees and volunteers so it has access to the most appropriate people for each role within it.

Policy Aim

The aim of this Policy is to provide information to assist with a smooth transition from one person to the next in all the key club roles.

Policy Purpose

The purpose of this policy is to clearly outline the importance of succession planning and how to successfully implement it.

Policy Detail

What is Succession Planning?

- a) Identify key roles of GW and how they are successfully performed
- b) Identifying potential people for those key roles, ensuring they are willing, skilled, capable and prepared
- c) Retaining skills, knowledge and information within the club by preparing for when people leave the club or their role

Done correctly, succession planning helps the club deliver better services to its Athletes, ultimately creating a more positive club culture. It is important to:

- Keep the Succession Plan brief, manageable and transparent
- Action the Succession Plan, review it and improve it

Benefits of Succession Planning

- Prepares GW for future coaching, administration and volunteering needs
- Preserves the knowledge that exists within GW
- Encourages GW to identify potential future leaders
- Allows time to provide formal or informal training to potential people
- Helps ensure a smooth handover from one person to the next
- Identifies future training needs
- Enables GW to share the load among people and avoid 'burnout'
- Creates a more appealing environment in which to work and volunteer

Barriers to Succession Planning

- People in leadership roles become restricted by long-held views about who can hold key positions
- Not all Management Committee (MC) members are committed to succession planning
- The MC lacks initiative to instigate, maintain, review and improve the Succession Plan
- Promotions are based on longevity of service, or a sense of entitlement, rather than competency and skill

- Recruitment and appointment to key positions is not transparent
- Personalities, egos or individual agendas get in the way of decision making
- People involved in the club are fearful of change
- Potential people are overlooked because they do not seem to fit the club culture
- GW fails to provide adequate training and development
- The MC has limited access to resources to invest in the succession planning process

The Succession Plan

- Hold regular and effective discussions about the benefits and processes of succession planning and be fully committed to it
- Identify the key positions GW, and when the positions may or will become vacant
- Maintain a club culture in which people want to coach and volunteer
- Embrace a positive approach to change
- Be inclusive when recruiting people to work and volunteer
- Engage youth in leadership positions wherever possible
- Ensure at least one other person within the club has a thorough working knowledge of each role in case they need to step in
- Provide training for Employees and Volunteers where appropriate
- Commit to good record keeping (Policies, Procedures, List of Employees and Volunteers etc)
- Enlist the help of people to identify and suggest potential successors
- Recruit potential successors regularly, exposing them to, and teaching them about, the club and various roles within it
- Provide an experienced mentor to support new Employees and Volunteers into a role
- Introduce potential Employees and Volunteers to key people who could give them insights about the role
- Provide potential appointees brief opportunities to take part of a role or task associated with the role, or to act in the role when a position holder is away
- Identify small, short-term roles or tasks for youth
- Use the Induction Checklist to ensure a thorough orientation to the role
- Use the Exit Checklist and Handover Report to help retain knowledge within the club

Current Coaches and Volunteers Preparing for their Own Exit

While GW can prepare potential successors, the current position holder in each role has an important task:

- Keep up-to-date and accurate records of their role and the processes they follow
- Plan for someone to take their place one day
- Mentor potential successors
- Have open communication with GW about their plans to leave
- Complete the Handover Report

Handover Report

The Employee or Volunteer completes this before departing the role or the club. It requests information such as:

- Who are their key contacts and support people are
- Any outstanding issues to follow up

- Any suggested changes to the Position Description or to the procedures of the role
- Any feedback or recommendations they may have either for the successor or more broadly to the Committee

Exit Checklist

This document is completed by a MC Member. It includes information such as:

- Confirming keys, folders, equipment, other club property etc have been collected
- Whether a Handover Report has been completed
- If there are any outstanding issues to be resolved after departure
- If the exiting position holder has been officially thanked for their contribution

Policy Breach

Where a member believes this policy has been breached they are able to make a complaint by referring to Part D – Complaint Handling Procedure of the Member Protection Policy.

Handover Report

(To be completed by the Employee or Volunteer prior to leaving role)

Name		Years of Tenure
Position		End of Tenure Date
Overview of Club operations		
Key Contacts for this Role		
Outstanding Issues To Be Followed Up		
Any recommended changes to Position Description or more broadly to the MC?		
Recommendations for Successor		
Has been introduced to their Successor		
Has been officially thanked for their service		
Willing to be contacted if the club needs clarification/information?	<input type="checkbox"/> No <input type="checkbox"/> Yes Contact No:	
Other notes/comments		

Handover Report Completed By

Name: _____

Position: _____

Date: _____

Signature: _____

This form is to be given to the Administration Officer and kept in a confidential place)

Exit Checklist

(To be completed by the Management Committee)

Name		Years of Tenure	
Position		End of Tenure Date	
Item	Details	Returned to Whom	Date Completed
Has completed the Handover Report			
Returned keys			
Returned club's electronic device(s) and security settings			
Returned all club property such as electronic information, banking records, cheque book, folders, notebooks			
Returned all club property such as personal clothing, name badge and all other items			
Any outstanding money has been banked or handed over			
Has been officially thanked for service			
Other Considerations			

Exit Checklist Completed By

Exiting Employee or Volunteer

Name _____

Name _____

Position _____

Position _____

Date _____

Date _____

Signature _____

Signature _____

This form is to be given to the Administration Officer and kept in a confidential place