



## Succession Planning

Succession planning ensures a smooth leadership transition by identifying and developing future leaders, minimising disruptions, and maintaining organisational continuity.

Succession planning future-proofs your organisation by ensuring leadership continuity and smooth transitions when key members leave. It maintains stability, protects your reputation, and prevents service disruptions.

### How to Plan for Succession

#### Keep board member terms varied

Staggering board member terms ensures a steady flow of fresh ideas while maintaining institutional knowledge. This prevents the entire board from changing at once, reducing disruption and ensuring smooth leadership transitions.

#### Ensure diversity on the board

A diverse board (including skills, backgrounds, age, gender) brings a range of perspectives, experiences, and problem-solving approaches, which serves to strengthen decision-making and representation. Ensuring a mix of ages, genders, cultural backgrounds, and skill sets makes the organisation more inclusive and adaptable.

#### Regularly identify skills and attributes the organisation could benefit from

By assessing the skills and attributes needed, organisations can identify gaps in leadership and plan for future recruitment. This helps build a well-rounded team that supports the organisation's mission and long-term sustainability.

#### Maintain a list of potential successors

Keeping a list of potential future leaders ensures the organisation is prepared for leadership transitions. This allows time for mentoring and development, reducing the risk of leadership gaps when key members step down.

#### Allow time for team bonding

Strong relationships among team members create

a positive and collaborative work environment. Regular team-building activities improve communication, trust, and overall effectiveness in working towards shared goals.

#### Have a system in place for information sharing

A structured system for documenting and sharing key information prevents knowledge loss when leadership changes. Using cloud storage, shared documents, or a centralised database ensures continuity and easy access to important records.

#### Ensure a strong induction for staff and board

A thorough induction process helps new board members, staff and volunteers quickly understand their roles, responsibilities, and the organisation's mission, setting them up for success.

#### Provide development opportunities

Ongoing training, mentoring, and leadership development empower individuals to take on greater responsibilities. Investing in growth ensures a pipeline of capable successors who are ready to step into key roles when needed.

#### Create and maintain external relationships

Building partnerships with other organisations, funders, and community leaders strengthens support networks. These relationships provide collaboration opportunities, resource-sharing, and external guidance during leadership transitions.

#### Have at least one shared email account

A shared email account ensures important communications are accessible, even if leadership changes. For example: admin@organisation.co.nz. This prevents loss of key contacts and maintains a professional and consistent point of contact.