

# Guide to Succession Planning

For Historical Societies and Community Heritage Groups

Produced by the Federation of Australian Historical Societies Inc.

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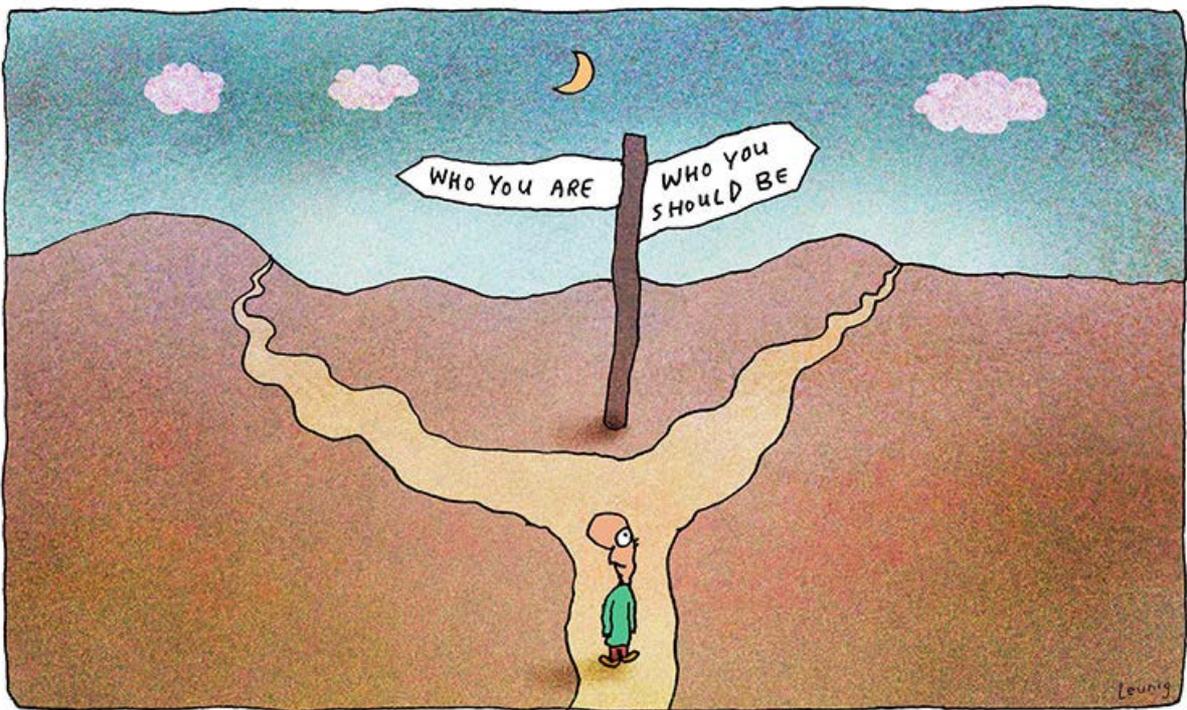


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## Foreword

Historical societies make a wonderful contribution to our communities. They do an enormous amount to collect, preserve and communicate our history and heritage, and the vast majority of this work is undertaken by volunteers. And, as we know, voluntary work is good for us as individuals and good for the communities in which we live.

To maintain this work we need to ensure that we are attractive to our communities, are well organised and offer our volunteers the best opportunities to exercise their talents and interests, whether these involve working in collections, serving as guides, as members of the administration committee, office bearers, etc.

For people of all ages we have to continue to work hard to make ourselves appealing and to spread the good news about our local history and heritage so that our neighbours will wish to become members.

Dr Bernadette Flynn has prepared a sophisticated analysis and comprehensive guidance advice for all our societies and their members, which I am sure you will find very valuable. I will not try to compete with that, but let me present a brief list of recommendations based on my many years of observation and discussion about the work of historical and heritage societies and museums.

You need to go out and invite people to come in, not wait for them to knock at the door. This may particularly apply when you are looking for office bearers with particular skills and attributes.

When people venture through the door, they need to be made feel immediately welcome.

Offer newcomers interesting and worthwhile activities and work, if they are willing.

Make sure that your local Council and community are aware of your local history and heritage and of the valuable contribution that your society is making.

Success breeds success. People are more interested in joining lively, productive and high-profile organisations.

We have to use all the modern means that are available to present us well to the modern public and to facilitate the effectiveness of our work – websites, digitisation of collections, social media, etc.

We have to be relevant and appealing.

I wish you all a happy succession.

Don Garden, FAHS President

## Preface

The Federation of Australian Historical Societies (FAHS) is committed to assisting historical societies and heritage groups in planning for its current and future needs. The FAHS has developed a number of guides across the themes of heritage protection and identification, publishing history, local history and schools' curriculum, and the business of running a society including disaster planning and recovery.

The FAHS Succession Planning Guide is designed to assist historical societies and heritage groups to survive and thrive into the future. In light of the key challenges faced by historical societies around management of collections, effective knowledge transfer and the complexities of running a small business the FAHS has developed a framework that provides sustainability. Planning for succession is a critical component of this sustainability framework.

## How to use this Guide

The guide is in two parts – an Introductory Guide and a Workbook.

**The introductory Guide** introduces succession planning, outlines why it is important and the framework for developing a succession plan. Some typical challenges and how to overcome them are addressed along with a range of success stories from around the country.

The Guide is provided as a framework for history and heritage groups, while recognising that organisations will approach succession planning in varied ways best suited to their current needs.

**The Workbook** takes you through seven steps to develop a plan for identifying your future needs for succession and developing potential successors for your organisation.

The Introductory Guide and Workbook can be accessed as a complete document or as separate documents. Each step and workbook template can also be individually accessed as required during the planning process.

## Introduction

### What is Succession Planning?

**Succession planning is what you need to do now to ensure that your society meets its objectives in the future.**

Succession planning is about looking at where your society has come from, where it is now, where it needs to go and what your society can do to get it there. It is a deliberate process to identify and nurture the best people to achieve your society's objectives over the next two, five or ten years. Effective succession planning creates a climate for the right members and volunteers to succeed in identified leadership and activity roles.

The aim of succession planning is to:

- ensure your society remains viable and there is continuity of essential roles if one or more key people cease their involvement
- safeguard the critical work of members and volunteers so that it continues well beyond their involvement with the society

## 7 Step Process for Succession Planning

There are seven steps to succession planning each one building on the other.

The first step of the succession planning process is to **revisit your mission and vision** – that is your purpose and future aspirations, which may have changed since your organisation was established. It is best to involve the membership in revision of the mission and vision so that there is broad ownership of the process.

The second step is to fully understand your current situation. Investigate what **things you do well**, what **things you want to do differently or better**, and what **changes you want to make** in the next 2-5 years.

The third step is to **evaluate the critical roles in your society** that fulfill your goals now and into the future. To detail the requirements of the position you may wish to consult the people in the existing roles in the organisation, for instance the people undertaking historical research or cataloguing archival materials.

The fourth step is to identify when people are planning on leaving and **the time frame for vacancies** in existing and proposed new roles. Develop position descriptions for each existing and new role.

In the fifth step you **identify how you are going to recruit people** to fill the roles, whether this comes from people in the society or via external recruitment. An action plan with procedures for induction of successors ensures they have skills and information needed to do a great job.

In step six you outline a process for induction and development of your new recruits and a development plan for each new successor.

In step seven **you evaluate whether the succession plan is working** identifying any changes that may impact on the effectiveness of the plan. The Succession Plan is a means to an end – that is ensuring that the work of the society continues into the future. It is a living document and as such will change over time in response to any changes in the society or community that need to be taken into account.

These seven steps create a big picture plan, which needs to be shared with the membership and other key stakeholders or relevant parties. Depending on your structure, you might plan a workshop or series of focus group sessions. Another approach is to involve the members once you have developed a draft succession plan and call a special meeting to present and discuss the plan.

## Challenges to Succession

Do any of these situations sound familiar?

### The society is struggling to maintain or increase its membership

- You may be struggling to maintain the membership and attract new people. The viability and sustainability of any volunteer organisation depends on its ability to attract new members and be able to recruit and inject new blood into its committee.
- Welcoming and including new people from outside the organisation brings fresh ideas, new strategies, knowledge and perspective.

### People in key roles are planning on leaving soon

- The search for replacements needs to start early so that you know in advance when people are planning on leaving.
- Knowing when roles are going to become vacant avoids a panic when someone is about to walk out the door.
- If people in key roles come and go too quickly, it is important to find out why people are leaving and develop ways of retaining members.

### Finding enough people to take on committee positions

- Investment in the development of current members enables members to prepare for roles in the future. This contributes to the long-term success and vibrancy of your committees.
- Knowing the situation of members is important as volunteers can suddenly leave, often for family care reasons
- Customised recruitment also needs to be considered to expand the make-up of your committee. It is important to look beyond present members particularly if you are having problem filling committee positions.
- If you are a local history society, do you have a youth representative on your committee? Is there an appropriate gender mix? Should positions be made available for a person from a Non-English speaking background? Ensuring diversity within the composition of your committee can help to reflect the needs and aspirations of your member base and the broader community.

### One person holds most of the critical knowledge about the society

- It is often useful to have an affable and constructive and professionally minded long-term committee member who is well respected and provides a sense of certainty for the organisation and has corporate memory. They are rare and valuable
- It can happen that a person who holds much of the critical knowledge can suddenly leave your organisation.
- In many situations no one else in the society has access to this information. The resultant loss of important information and organisational memory is a major challenge for societies.
- It is important to have a plan that includes a process for transferring information before that happens.

### Lack of documentation on procedures to run the organisation

- You can find yourself in the situation where there are long-term members with lots of knowledge and none of it written down.

- The solution is for members to record key information and procedures in their role and to regularly update documentation.
- Where and how do you keep vital information? Is the information accessible? Is your documentation secure? Is it at environmental risk? Documented procedures (including paper based manuals and computer data-bases) need to be accessible.
- There should be a policies and procedures manual that outlines the day-to-day basic operations of the organisation. Passwords, registration etc. should reside with more than one person so that the information can be easily retrieved.

### Office Bearers staying too long

- You may have some committee members who have been there for a long time. While great value lies in retaining experienced committee members, there is also a risk that a committee will become stale, that members will become entrenched in their ways, and the environment will be less attractive to new members.
- You may have a person in a leadership role such as President for an extended period and who feels that they are the only ones who can do the job. Sometimes people stay on the management committee because they can't get new people. At times members don't feel confident asking them to leave.
- Many historical societies have fixed terms for office bearers and a limit on successive terms written into their constitutions. These rules differ between states and territories. For instance, in the new rules for associations incorporated in NSW the maximum number of consecutive terms of office of any office-bearers must be addressed in the constitution.<sup>1</sup> Requiring the President and other office bearers to leave for a period after several years ensures that new perspectives will routinely be brought to the management committee. Having a maximum term also makes it easier to recruit people to the committee, as they understand they will not be on the management committee indefinitely.

### No plan for what happens to collection material and organisational records in the rare case that a society has to close.

- The complexity of preserving and interpreting a society's records and collections involves a very wide range of skills and interests, including specialised skills in IT, research, history, education, design, writing, editing, and so on.
- Cataloguing, preserving and documenting organisational records and collection materials will help protect these resources into the future and ensure they don't get lost.
- It is important that you have structures in place for the transfer of these valuable materials (both physical assets and digital records).
- Societies need to consider the possibility (however faint) that they may have to close. In small towns there may be a time when the Historical Society has done a huge amount of work with successful outputs and then decides to close, which is accepted by the community.
- The rules for associations require that a constitution contain a winding-up clause according to the laws that govern incorporated associations. The laws

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<sup>1</sup> New Rules for Associations Incorporated in NSW took effect on 1<sup>st</sup> September 2016.

will depend on which state or territory your society was incorporated in. All organisations that have been endorsed by the ATO as having deductible gift recipient status (DGR status) are required to have a clause within their constitution dealing with winding up the organisation. This clause will require the organisation to distribute all surplus assets to another DGR fund, authority or institution that has a similar primary purpose.

*‘Our real strength is in the varied expertise, quality of knowledge and broad life experience in doing family history research by our long-term members, and a willingness by them to share that information with others.*

*We need to be more active in Succession Planning to continue that in the future. Our Society and other groups need to actively develop and incorporate some level of succession planning; run a series of oral history sessions with these founders; initiate professional workshops to impart at least some of that knowledge and record it, and put it in a form that can be passed on to future generations’.*

Danny O’Neill, Education and Events Program Coordinator, Heraldry and Genealogy Society of Canberra (HAGSOC)

## **Summary of why Succession Planning is important for your Historical Society**

- Helps you to clarify critical roles within the society, skills required to carry out these roles and potential volunteers who possess these skills.
- Succession planning will help you identify what roles and skills are essential for your organisation to continue to function and deliver its services
- It enables targeted recruitment of new volunteers with particular skill sets and interests.
- It prevents the organisation becoming stagnant or people getting stuck in roles for too long because there is no one else on the committee who wants to take on the role.
- It creates a better cultural ethos and creates a more attractive environment for new members, volunteers and visitors.
- It facilitates information sharing and good record keeping which avoids the loss of important information.

- It helps ensure that you have good procedures in place for passing on information (e.g. members data-bases, society networks, passwords, collections).
- Helps clarify and promote who you are and how you intend to be a long-term organisation.
- Succession planning is the best insurance for an aging volunteer workforce.

A Succession Plan relies on good implementation. A lot depends on timing and the current needs of the organisation. There may be different perspectives on the value of a succession plan, a resistance to plan for the future or a wariness to embrace change in general. The society, its members and interested parties need to be open to change to the organisation's structure and readiness to engage in the succession planning process.

*'If we don't change we're in danger of being part of our own fossil collection'*

Cheryl Mongan, President, Yass and District Historical Society

## **The Framework**

### **Where are you heading?**

You can only do a Succession Plan when you know where you are heading and what you want to achieve. In corporate speak this might be a strategic plan or a SWOT analysis, where you identify organisational strengths, weaknesses, opportunities and threats. If you don't have any of these in place it is worth undertaking a forward planning process before you start.

The Forward Planning Template developed by the Museum Accreditation Programs of Museums Victoria is a helpful resource to guide historical societies in undertaking a SWOT analysis and identifying long term and short term goals.

Another useful document is the Strategic Planning Manual developed by Jennifer Colbert for Museums Australia. The Strategic Planning Manual sets out a planning process that can help historical societies in reviewing operational activities. It outlines a number of steps: Situation analysis - where are you now; goal analysis - where do you want to be, and strategy analysis - how you will get there. The documents are available on the FAHS website at [http://www.history.org.au/Training\\_and\\_practical\\_advice.html](http://www.history.org.au/Training_and_practical_advice.html)

If this all sounds too serious remember that you are in competition with a range of other well-deserving organisations for members and volunteers. Your future success also depends on how well you can attract researchers, visitors and other potential users of your service away from other forms of engagement offered by the cultural industries, libraries, community groups, and online culture etc.

## Who does the Succession Planning?

Succession planning is a process best initiated by people involved with the governance of the organisation (those making and implementing decisions). This would normally be people from the management or executive committee who have direct involvement with the members and are familiar with the day-to-day operations and requirements of the roles.<sup>2</sup>

A Succession Planning Sub-Committee might be formed of two to three office bearers and include one or two active members, for instance the President, Vice-President and include another key society member. As in any forward planning processes, the members and key stakeholders need to be part of the process. It is important from the beginning that you create a culture of theirs not ours so that people do not feel that their contribution or position is being undermined or goes unrecognised.

## Cultural Ethos

Creating a good cultural ethos and welcoming environment is important to nurture and grow your support base. Your environment needs to be interesting enough so that people want to visit you and a positive place so that volunteers want to stay.

Members join historical societies and heritage groups for a variety of reasons including social connection and contribution to the community. Involving people with the right skills and attitude will help you to create plans that are well-informed, realistic and interesting, and can inform and guide everyone involved in the business of doing history. People involved with the society might be committee members, volunteers, tourists and casual visitors who attend lectures, events etc. You may also be in the position to have staff and/or paid consultants.

People will be attracted and loyal to an organisation that has a positive environment that nurtures and supports their interests. Promoting the success of the society in newspapers, community bulletins, local news and social media will help to recognise volunteer contributions and encourages people to stay involved.

*'The environment needs to be interesting enough so that people want to come to the museum.'*

*'They need to come to a positive place. Volunteers come because they want to..... involve everyone at the lunch table.'*

Lorene Long, Museum Curator, Stanthorpe Historical Society and Museum, QLD

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<sup>2</sup> Being incorporated requires that the organisation must establish a management group. This group of people might be called a management committee, directors or board of directors, a council or councillors. For the purposes of this guide the nomenclature used is management committee or committee.

## Partnerships and Collaborations

It is often beneficial to seek out and engage key stakeholders and valuable partners in the succession planning process. For instance aligning with the strategic plans of the local council or linking to the mission of other potential collaborators (e.g. local libraries, galleries and cultural bodies).

*‘Preserving local history is a community affair. It requires interaction between organizations of all kinds, at every level’.*

Caitlin Gow and Heather Collins, The Historical and Genealogical Society of Tomorrow, Young Savvy Genealogists

## Conflict Resolution

People can leave historical societies due to conflict or disagreements within the membership. Volunteers don't always speak up and if something isn't working it is important to respond to this situation and guide people through a conflict resolution process.<sup>3</sup>

*‘The best way to deal with conflict is to address it as soon as you can and before it gets bigger and more difficult to deal with, by taking a shared approach, to work together to solve the problem, and by recognising and listening to the other person's concerns as soon as you see a problem arising, and before it gets out of hand’.*

NSW Volunteering: Conflict Resolution Toolkit

If your organisation is facing conflict between members, or worse harassment or bullying, it needs to be dealt with immediately. Having policies in place around unacceptable behaviors is important for the health of your society. Formal written grievance procedures and mediation processes provide a mechanism for dealing with these difficult situations and work to support the overall wellbeing of the volunteers and the society.

Succession planning can only start when any conflicts have been resolved. If a member's behavior is undermining the strategic direction of the organisation, or if there is cynicism about the succession planning process, it is unlikely that the implementation of the Succession Plan will be successful.

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<sup>3</sup> In NSW and the NT Community Justice Centres offers advice on better ways to handle disputes and a free mediation service. Dispute Resolution Centres (QLD); Mediation SA, Dispute Settlement Centres (Victoria) operates on similar principles.

## Success Stories

### *'Success is essential to Succession'*

Don Garden, President of the Federation of Australian Historical Societies and the Royal Historical Society Victoria

#### Retaining new members and encouraging people to take on committee positions

Eden Whale Museum and Historical Society attract new members by involving newcomers in activities being enjoyed by the volunteers. The people who decide to dip their toe in the water often stick in place, becoming solid members of the community. The society aims to reward a person's interest by locking them in to even the smallest of responsibilities for a short term and support their efforts to be successful. This often results in them becoming important members of the team and taking on committee positions.

#### Attracting new members

New Farm & Districts Historical Society currently has a large and growing membership with about half of these members active in the society. The society sees building community connectivity as central to their success. The society promotes a sense of belonging and connectedness through being active in the community, participating in local events, and ensuring a wide distribution of the history newsletter to a mailing list of more than 800. A lively program of talks and events welcomes long-term members as well as newcomers. Membership is kept at a low \$10 to encourage a wide range of participation.

#### Community Engagement

Moruya and District Historical Society has actively focused on engaging the community and going out into the community rather than waiting for the community to come to them. For instance, the society has connected with, and participated in the culture, arts and events in the town through public programs, curated and arranged travelling exhibitions as well as social media (Blogs, Facebook, Instagram, Flickr and Pinterest). The success of the society is attributed to the enthusiastic volunteers who are open to these new ways.

#### Cultivating Volunteers

The Historical Society of Cockburn in Western Australia supports volunteers through a mentoring and buddy system along with providing relevant documentation and outlining expectations clearly. Recognising that not all volunteers want to become members, or are time poor, the society provides different ways that the community can contribute to society activities. It actively promotes the work of the society and highlights the importance of engaging with the public and providing a valuable service to the community.

#### Managing Volunteers

Stanthorpe and District Historical Society and Museum have developed a strong, loyal volunteer team who contribute to the running of the museum. Well-documented procedures and simple systems are in place which outline the things volunteers have to do. The society ensures that people come into a positive place where respect is paid to everyone and where people feel involved so that volunteering is a badge of

honour rather than a chore. They deal with conflict immediately and have a policy of no gossiping. Evaluation of volunteer management takes place every year as part of the annual strategic plan.

### Sustainability

A focus of the Coburg Historical society is sustainability. The society has looked at how they can secure the future of the society and have developed three strategies: the cultivation of a virtual presence, development of educational tools, and forming valuable alliances. An example of the latter is a recent exhibition that involved the local community through collecting stories and in obtaining the support of the Moreland City Council open space planning team; Moreland libraries; Museums Australia roving curator and local rotary clubs. They are also addressing how to better represent the multicultural communities of the area, currently not reflected in the collection.

### Attracting younger people

Coburg Historical Society has worked very hard over the last 5 to 6 years to respond to the changing needs of historical societies by developing an inviting public approach. This includes welcoming younger people who have brought in a range of skills including museum and exhibition expertise. At least one of these volunteers works remotely to develop online media.

### Partnerships

Queanbeyan & District Historical Museum Society has developed a supportive relationship with the Queanbeyan-Palerang Regional Council and are recognised within the council's strategic plan. The Council has donated the land and provides funding for a part time museum assistant who is working to catalogue the collection.

### Relevance

The Gisborne and Mount Macedon Districts Historical Society put its success down to the enthusiasm of the members and their love for sharing the history of the area. The society takes a pro-active leadership role in heritage and in 1995 formed the Macedon Ranges Heritage Council which represents and provides a focal point for all heritage and historical groups within the Macedon Ranges Shire to liaise as a single body with shire administration and be a forum for the exchange of ideas.

### Governance

Since 1999, Parramatta & District Historical Society has been on the path of improving the governance and operational management of the society. Prior to that it was a learned, scholarly society. It had people with a lot of knowledge and none of it written down. This was turned around through developing an annual strategic plan with an allocated budget and a business plan that is carefully monitored. The society works on empowering people and getting it written down. For new members there is a volunteers handbook, OHS procedures, a formal induction process, and for any new guides, a training day. There is also a management manual, which includes position descriptions for twenty-one different roles. People report to monthly meetings and receive training in areas relevant to society activities such as, collection management and significance assessment. The Society ensures turnover of the Society President, Secretary and Treasurer who can only serve for two terms of two years. The President, Secretary and Treasurer then need to stand down for two years before re-election.

## Digital Presence

The Carnamah Historical Society has embraced digital media to promote their activities through a vibrant web and social media presence. The website hosts a virtual museum, which tells local history stories through objects to create an engaging sense of the social interactions in the past and provides curriculum education resources. The society has a policy of sharing material and operates under a creative commons licence where any content can be freely shared providing that the society is attributed.

## Virtual Volunteering

Carnamah Historical Society secured grants from the Department of Culture, the Western Australian History Foundation and the Arts and a Social Innovation Grant to establish Virtual Volunteering. Virtual Volunteering engages volunteers remotely to assist with transcribing documents. The innovative work of the society has been recognised through a Museums and Galleries National Award (MAGNA) in 2014 and were highly commended for a suite of Australian Curriculum Resources and for excellence in the West Australia Heritage Awards in 2015.

## A Final Thought

*'Just because you're successful, doesn't mean you don't need succession'*

Amanda James, Senior Community History Officer, History Trust of SA

## Next Steps

The introductory guide has outlined key areas to prepare you for undertaking the succession planning process. Now go to the [Succession Planning Workbook](#) to develop and document the seven steps of your organisation's plan for succession.

## Acknowledgements

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