

Step 6 - Induction and Development of Successors

Screening

Once you have identified avenues for recruitment, it is a good idea to set out a screening process to make sure the people you are recruiting for specific roles are right for your society. 'Right' can have many aspects not limited to skills, but including personality traits and aligning with the purpose of the organisation.

'Go with the enthusiasm'

Lee Davey, Member, Queanbeyan & District Historical Museum Society

The succession planning committee will undertake a process to recruit, screen and induct new members and volunteers to decide whether the individual is suited to the particular position within the society. In order to screen new recruits the committee might use the following methods:

- Assessing written applications
- Formal Interviews
- Informal chats
- Checking references

The screening process might also include a working with children check and police check depending on the specific role and the level of risk.

It is important that new members and volunteers understand exactly how their role fits within the 'big picture' of the society. Assigning trial periods for new people is valuable for both the new person coming into the role and the organisation.

Being welcoming and inclusive is important to attract the types of people you want in your society and to bring new energy into the organisation. Develop strategies for how you might do this.

'Done right volunteering becomes a badge of honour rather than a chore'

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

Induction and Successor Development

All new volunteers will be comprehensively inducted into the organisation. Induction will follow the Induction checklist, which may include:

- Contact details
- Background information on the society
- Code of conduct
- Meeting schedules and member events

Identify who will be responsible for providing orientation to successors and who will support successors' development. Providing ongoing training and development opportunities ensures that successors are improving their skills and knowledge in preparation to take on specific roles within the society. This involves providing members and volunteers with a description of duties and targeting training opportunities where necessary along with the allocation of budget resources.

You might employ the following training and development techniques for successors:

- Training and development opportunities in your area, such as Museums Australia; Oral History Workshops etc.
- A mentor program, where the new person works closely with person with experience in the role (e.g. an experienced researcher working with a new member)
- A buddy system, where the new recruit has a support person who has been with the organisation for some time
- Training courses offered by museums or (e.g. formal training courses like 'Running Your Society: It's Your Business' provided by Museums and Galleries NSW)
- Attendance at workshops, conference or symposia

Review

A formal review process is useful for both parties. This may take place within the first two to six months or at the end of a specific outcome based project. The succession planning committee may make a report to the President/Vice President for final approval.

It is also useful to evaluate how well the recruitment process itself is working by considering factors such as how long it takes to find a replacement for critical roles and how well the new member or volunteer engages with the role.



6. Successors Development Plan

Outline the skills and knowledge to be developed, training and timeline. Complete the table for each new role.
(The current content is an example only, please complete for your own situation).

Successor Name	Current Position	Future Position	Skills/Knowledge to be Developed	Time Frame	Training/Development Required	Deadline for Delivery	Mentor/Person Responsible
Sarah Anderson	General Member	Vice President	<ul style="list-style-type: none"> • Mentoring by President • Experience in writing reports • Experience in liaison with regional body • Experience in recruiting/attracting new members • Contact details of other members and associated bodies • Confidence level with delegated authority 	1-2 years	<ul style="list-style-type: none"> • Orientation • Assist current Vice President with tasks • Mentoring from current President • Networking opportunities - visiting other societies to share information • Formal introduction at Historical society Committee meeting and opportunity to swap contact details. • Current VP to deliver 'handover notes' with contact information and take opportunity to make informal introductions at events. • Sarah to observe current roles in operations of society eg newsletter; museum; computer data 	<ul style="list-style-type: none"> • Sarah will need to be prepared to take on the new role by the Commencement of 2019 • Mentoring from January 2018 • Budget for Community museums day at Museums Australia Conference 	<ul style="list-style-type: none"> • Current Vice President • Current President • Historical Society Committee

Successors Development Plan

Outline the skills and knowledge to be developed, training and details of the training.

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