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Succession Planning Workshop

Introduction - what is succession planning? (5 mins)

Group exercise 1: identify the key challenges (10 mins)

Feedback from groups (10 mins)

Group exercise 2: identify positive actions (20 mins)

Feedback from groups (10 mins)

Summary and resources (5 mins)

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Audrey Dunn, Development Officer: Audrey@dtascot.org.uk





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What is succession planning?

- Succession planning is about long term sustainability:
 - Examining where you are currently;
 - Planning for the future and what you want to achieve and;
 - Understanding what you need to do to get there.
- Having a system in place to ensure that when someone leaves you are not left with a black hole of knowledge and expertise.
- Retaining good people and attracting others when their tenure is over.
- Creating financial and organisational resilience.
- Ensuring strong leadership.

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Group Exercise 1: The key challenges to succession planning for
Development Trusts

(10 mins)

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The key challenges to succession planning for Development Trusts

- Volunteer fatigue
- Small population – lack of diversity
- People don't want the responsibility
- Unable to commit the time
- Don't think they have the right skills
- Concerns with the DT
- Community conflict
- Lack of capacity/resource for the DT to make plans

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Group exercise 2: identify positive actions (20 mins)

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Succession Planning – good practice

- Demonstrate good governance.
- Skills audit – understand the skills you have and identify gaps:
 - Understand key responsibilities, skills and competencies required of senior roles.
 - Identify people from community, membership, staff that would have interest/potential in developing leadership skills.
 - Provide mentoring, training. People in shadowing positions. Recognise good work.
 - Skills development good for attracting younger people.
- Have clear policies and procedures in place.
- Have all job roles defined/working groups with clear remit
- Good comms & PR – use multiple methods of communicating with members and wider audiences.
- Be open and transparent.
- Evaluate your work. Celebrate your successes and show that you have taken on board lessons learned.

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Further DTAS help:

[SORT-IT training](#): a full day's facilitated workshop to support your strategic planning

[Directors' training](#): legal roles and responsibilities of being a Director and/or Trustee.

[Scottish Community Alliance](#): Community Learning Exchange funding to learn from peers.

Remember to check out our **e-bulletin** for info on training sessions, webinars, etc.

Other resources:

<https://supportingcommunities.org/succession-planning>

<https://reachvolunteering.org.uk/trustee-recruitment-cycle>

<https://www.ncvo.org.uk/help-and-guidance/governance/improving-your-work-as-a-board/equality-diversity-and-inclusion-at-board-level/#/>

<https://www.ruralsehub.net/wp-content/uploads/2020/10/Succession-Planning.pdf>

<file:///C:/Users/User/Downloads/Succession-planning-for-community-heritage-groups-ENGLISH.pdf>

Contact your local
Development Officer
for more info or
info@dtascot.org.uk

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Audrey Dunn, Development Officer: Audrey@dtascot.org.uk





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Thank You!

DTA Scotland Annual Conference 2022

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