

How To Do Succession Planning (128)

Every route has its own 'movers and shakers' – people who have that vision, ability and energy to see what needs to be done and to make it happen. But it should never be forgotten that most people involved in managing the route also have their own businesses to look after, so the support of others is always essential.

More importantly, though, others in the route need to be regularly stepping in to take responsibility so that they learn how things are done – for the day they need to take over official positions within the organisation. This is the process that succession planning tries to encourage and formalise.

This Guide will explain the principles of succession planning, and how the route can use these ideas to build capacity within the group of members so that the right people can take over responsibility for the route when the existing office-bearers need to move on.

The main message here is that it is seldom healthy for a route to rely too heavily on a few individuals. This can create dependency and risk the long-term sustainability of the organisation. The route may even decide to put a limit on the number of terms that an office-bearer can serve, which will force the organisation to share skills and 'pass the baton' to others in the group.

There is no better way to learn than by doing, but to do a job properly does require some experience and preparation – rather than simply letting a person 'sink or swim'. Every route needs to consider the best way of transferring skills from existing office-bearers to new entrants, so that the future of the

organisation can be secure.

Why is succession planning important?

It is important to plan ahead when getting people into positions of responsibility, because their actions will affect how the route performs. The main functions usually include a Chairperson, a marketing person, a secretary, a financial manager and a development officer.

These roles demand particular skills (the marketing person, for instance, must be a good communicator with an extensive network of contacts in the area), but also an understanding of how the Route Forum works – in other words, its operating procedures and policies. A member who is not involved in the forum may not always be familiar with how these things are done, and so succession planning is vital to induct new people into this environment of rules and processes.

What is succession planning?

Succession planning is what the route does to ensure that new members are willing and equipped to take over the duties of running the route when the incumbents (those in official positions) need to move on. This might involve some formal training, but it usually relies more heavily on forum members taking new people under their wing to show them how everything works, this is best done over a long period of time – even years – depending on how (in)experienced the new people are.

Developing a succession plan

It is important that each forum member plans their exit from their position, preferably about a year in advance. This means deciding on a date when they intend to move on, and

identifying other members who may be interested in taking over.

The first step is to think ahead. In addition to the skills usually required by each portfolio, consider what the route's plans are for the next few years. Bearing this in mind, look for members with relevant skills and check if they are willing to consider the position.

Remember, the office bearers are usually elected by members every year at the AGM – so it can't be assumed that your preferred person will in fact be able to step into your shoes. But a responsible Route Forum will prepare and nominate people for election, to ensure that the route's work can continue. If the members choose to elect someone else, this is usually the right afforded them in the constitution.

In the succession plan, include a timetable of events for the transition. Set targets and tick them off as they are achieved. An example might be: 'Introduce X to stakeholders, 1 March to 30 May', and 'Spend time on financial system, 1 to 14 June'. This timetable can be as detailed as you feel necessary, and it can be altered as required. Some aspects of the training can be run at the same time.

What skills should you be looking for?

These will depend on the portfolio, but there are nonetheless some aspects that are common to all managing directors:

Leadership abilities

There are many leadership styles, but they all boil down to the ability to get the best out of the people you are working with. Does your potential successor inspire and motivate others?

Organisational abilities

Your successor should be well-organised – and hopefully, he or she has already demonstrated this in how they run their own business or in their job.

Interpersonal skills

Running a successful route is all about being able to work effectively with people – whether they are other forum members, route members, or stakeholders from government or the private sector. This requires good manners, firmness, patience and an appreciation for urgency and deadlines!

Who is involved with succession planning?

It is mainly the Route Forum that needs to be concerned with planning successors. Its roles are the most vital to the route, especially if the route does not yet have any paid office staff.

How to apply succession planning to the route?

It would be useful for the route to stipulate in the job description (or responsibilities) of each forum member that they need to identify and train a new person to take over their role. Ideally, this new person could be assisting with tasks for a number of months – even years – before taking over.

Practical tips

- Each portfolio in the Route Forum should ideally have a core group of volunteers from among the members that is

interested in this field of work, and can get involved with projects. Successors can then be drawn from this pool of people, who have already demonstrated their interest and ability. Their work in the portfolio will also make them familiar with policies and procedures.

- Identify the areas of expertise that are vital to the portfolio and identify which of the members shows these skills.
- See if there is any training available in your area that could better equip members for the roles in the forum.
- Give encouragement and performance feedback to members who show promise, and gauge if they respond by working on these skills.
- Get members involved in higher-level projects to see who rises to the challenge.

Use of this Guide

The Route Forum can use this guide to ensure that members are being cultivated to take over roles of responsibility. If the route employs staff, then these roles should also be considered as good opportunities to channel local people. Open Africa's philosophy is to build capacity within the community and to equip locals to manage and grow the route.

Other Resources

Here are some other Guides and Resources that relate to succession, building capacity, and encouraging members to participate in the running of the route:

- Guide: [How To Elect Your Route Leadership And Appoint Them To The Best Positions](#)
- Guide: [How To Lead Your Route](#)
- Resource: [Video – How Great Leaders Inspire Action](#)
- Guide: [How To Unite Your Route Behind A Shared Purpose Or Vision](#)