

## Overview

These guidelines will support volunteer managers to develop and implement succession plans for those roles which are considered to be 'key roles' (organisational critical) within the different volunteering areas across the RNLI.

## What is succession planning?

Succession planning is a process for identifying future candidates for key roles in order to ensure sustainability of the activity. This process includes identifying current volunteers or recruiting for new volunteers with the right skills sets who will be able to step into a role, should the role become vacant either unexpectedly or expectedly. This will future proof the function that is being delivered.

## How will this benefit the RNLI?

- It can help the RNLI to nurture and harness internal talent as well as retain volunteers who possess valuable skill sets, knowledge and experience. It's a great development opportunity for current volunteers, who may be seeking a lead role.
- It will assist in ensuring that all key volunteer roles are future proofed against volunteers who leave the RNLI, unable to continue in these roles for whatever reason that might be. See Volunteers Leaving the RNLI Guidelines.
- Having an inclusive approach and promoting opportunities to a wider audience will help the RNLI to attract new people with new ideas and approaches and thereby ensuring we grow a more diverse organisation.

## What are 'key volunteer roles'?

The RNLI has a number of key volunteer roles that are needed to function efficiently ie they are organisation critical roles. These can be roles in any teams for example, Volunteer Shop Manager and Lifeboat Operations Manager.

## Succession planning process stage 1

### - preparation

The following are some suggested guidelines to assist volunteer managers when considering a succession planning process for key roles:

- Identify the key volunteer role/s without which the area would not function efficiently, if at all.
- Ensure a role description (RD) is in place for each key role and that it is up to date (if you need any help with this, please get in touch with the Volunteering Development Team).
- Be familiar with all roles which have a tenure or 'stepping down age' (this information can be found on the RD) and ensure volunteers carrying out those roles are aware of this.
- Find out if volunteers in key roles have a planned date in mind when they wish to step down from the role; having this knowledge will allow for timely planning.
- Create a record of all data collected using the Succession Planning Template. This will assist in the succession planning process ensuring that all key roles are identified and a succession plan is developed, recorded and monitored for each of these roles.
  - The record will provide a visual reminder of all key roles and any related succession planning work already carried out. Equally, if managers leave or move into new roles, there will be a seamless transfer of knowledge relating to the succession planning carried out in that area.

## Succession planning process stage 2

### - recruitment

Having done all of the ground work, the ultimate aim is to find the right people to fit the key roles looking both within and, where relevant, outside of the organisation:

- In order to ensure equality of opportunity, a selection process should be followed to demonstrate fairness throughout.
- Candidates should be considered on a succession planning programme based on their suitability for the role rather than on their length of service or current role.

- All key roles should have somebody in the pipeline who can step into that role at a moment's notice! It is a good idea to expect the unexpected.
- If a deputy has already been identified for the key role – ensure that the individual is added to the Succession Planning Template.

Options to consider when looking for suitable candidates for future key roles:

- Promote the opportunity to both the current RNLI team and externally to ensure a fair recruitment process. If you need any support with recruitment please speak to your Volunteering Adviser.
- A candidate may highlight their motivation to carry out a different role during a volunteer review meeting and/or during the assessment of competencies. These discussions can provide a useful starting point to understand the individual's potential and interest in a particular opportunity.
- Also consider whether it is appropriate to have more than one successor in place for the role. This may be appropriate for short-, medium- and longer-term planning and to cover any holiday or sick leave etc.

## Succession planning process stage 3

### - training

There is no one training model for succession planning as requirements will vary across the different volunteering areas of the RNLI. The following are a variety of approaches which may be appropriate for different volunteer groups; it may be a good idea to incorporate a selection of different training methods to facilitate the required learning:

**Hands-on experience:** This can be invaluable in providing learning that cannot be learned elsewhere.

- The individual would carry out the role alongside the current role holder and receive one-to-one advice and guidance. This will enhance the individual's skills and knowledge in all areas of the function focussing on gaps in knowledge where required.
- Hands-on experience can take place over a short or extended period dependent upon requirements.

**Mentoring:** Finding somebody who has the experience and knowledge of the role to be a mentor for the individual may be useful. This might be the person who is carrying out the role or, somebody who has all or

some of the skills required and the availability to provide this type of support which is generally given over a prolonged period. The focus would be on developing a sound understanding of the role and dealing with different issues in a supportive environment.

**Training** may be required for some key roles and therefore this should be started as quickly as possible according to the volunteer's availability. There are a wide range of learning opportunities that may be available to support the volunteer in their development including both capability and behavioural. Please speak to your volunteer manager to understand more about the training available.

**Secondments:** Considering development activities across the organisation can be very useful in acquiring skill sets over a short space of time however, this can only take place if time permits from the volunteer's perspective. Examples might be a crew member wishing to advance to coxswain spending some time at another lifeboat station or a shop manager spending time at another shop location to gain some wider knowledge etc.

**The Learning Resource Centre:** The LRC has an excellent range of resources which may meet the needs of volunteers who wish to develop into new roles. They have the facility to post these out – please contact the helpdesk for more information on what's available by emailing [lrc@rnli.org.uk](mailto:lrc@rnli.org.uk).

## Other considerations

Whilst the volunteer manager should be heavily involved in the succession planning process, the relevant staff manager should also be involved. This will avoid a focus purely on the current skills needed and take into account what future needs should be considered. Succession planning is not intended as a process to remove volunteers from their roles however, it may have the potential to be perceived as such. For this reason it's always prudent to manage succession planning with sensitivity.