

# Succession planning for Digital Skills programs

It is often hard to predict when a highly valued person may leave an organisation. We know staff and volunteers move in and out of roles all the time, for many different reasons. You may have heard of the saying, “If you fail to plan, you plan to fail” .... Succession planning helps to prevent your digital skills programs from stopping when key people leave, allowing your organisation to keep supporting your community.

## What is succession planning?

Succession planning is the process of identifying and developing future leaders to take over essential roles when a person is promoted or leaves an organisation. Effective succession planning supports the seamless continuity of roles and supports available from your organisation.

## Succession planning is important

Implementing a succession plan is vital because:

- You don't want all the hard work you have invested into building a successful digital mentoring program to slow down or to stop because someone is no longer involved.
- It ensures the “corporate knowledge” a person has gained in their role is passed onto their successor - this includes little details like why a program is run in a certain way, and what they have found to work - or not!.
- It prevents confusion, chaos and miscommunication occurring within an organisation when someone announces they are leaving or needs to take unexpected personal leave.
- It can save money, as an organisation may not have to advertise and recruit for a role, induct and train someone new or progress through a probation period.
- It supports your organisation's performance review process and learning and development goals by extending the knowledge, skills and experiences of your digital mentors.

- It is an ideal opportunity for digital mentors to gain workplace experience at a higher level.
- It is a great retention strategy, especially for volunteers or digital mentors who are seeking more from their organisation.
- It can boost the performance of digital mentors as they take ownership of their work and feel valued within the workplace.
- It showcases your leadership and planning skills and how you value your team.
- It provides the successor with adequate time to ask questions, be a part of supported meet and greets with key stakeholders and to adapt to their new role and its responsibilities.

**TOP TIP:** Use the performance review process to discuss and identify existing staff or volunteers suitable to include in your succession plan.

## Some roles will need a succession plan more than others

Essentially, any role that is critical to the operations of your organisation should have a nominated 'successor'. This can include volunteer and paid roles.

Digital Mentors and Program Coordinators are essential to the ongoing success of all digital skills programs. Both roles should have a succession plan in place so work supporting the community to increase their digital literacy can continue in their absence. If your organisation has a Lead Digital Mentor working within our Capacity Building program, or a Digital Health Mentor in our digital health literacy programs, they will also be critical roles to have a succession plan for.

If your organisation is large enough, consider identifying a number of people who can be their successors.

**TOP TIP:** A digital mentor is the person who facilitates a person to improve their digital skills, sometimes also called a 'tutor', 'teacher' or 'digital champion'.

## Action your succession plan at key times

As the nature of work and life in general is dynamic, organisations should actively plan for the succession of roles in advance of a person leaving.

There are several key times when you will need to implement a succession plan:

- When a person in a critical role is promoted
- When someone retires or leaves the organisation
- When someone takes long periods of leave such as annual leave, sick leave, carers leave, maternity leave or long service leave (this may happen unexpectedly).

## Organise your succession plan in advance

Start the process early. The key to successful succession planning is having the plan in place in advance!

**ACTION:** Consider how you can apply the following steps in your organisation or program to develop successors:

- When inducting new digital mentors, listen to what they are telling you about their experiences and skills. Take note when someone may suit a role such as Lead Digital Mentor or Program Coordinator.
- Observe, monitor and support their performance with ongoing training and development.
- Be actively involved in the quarterly performance reviews with existing digital mentors to discuss their work, professional aspirations and to help you identify potential candidates.
- Seek the support of your manager and discuss the succession plan.
- Ask your volunteer coordinator to keep in mind the skills and experience you need for your core roles when they recruit or induct new people or conduct performance reviews with existing volunteers.
- Consider questions such as, “Which digital mentor would be the strongest candidate to fill this role?” or “Would this volunteer need extra training to become a digital mentor and if so, what type?”.
- Privately discuss with potential candidates your succession plan to gauge their interest.
- Hold ongoing conversations with the candidate/s to identify and find solutions to address gaps in their knowledge or skills. Our resource called, [‘Manage and upskill volunteers - Future proofing your volunteer program’](#) has some great tips on upskilling.
- Create a flexible plan with the candidate/s which allows them to shadow you on a regular basis. ‘Mentoring a mentor’ is a key way to build up a new person’s skills and confidence.

- Ensure key processes and procedures that support the role are well documented and stored in an easy to retrieve location that others in your organisation know about.
- Document key processes, procedures and lessons learnt as you go. Writing these down can take time, so breaking it up to add to a 'how-to' document when you are next doing that activity can be easier to achieve when you are in a busy role.
- Do a trial run with the candidate to allow them to gain experience and a deeper understanding of your role. It also provides them with the opportunity to opt out if they choose.
- Make sure there is a transition period. Implement your succession plan well before a person intends to leave a role so you have the time to adjust the plan if required and so the process becomes seamless.
- Invest in the time to complete a full handover so successors can hit the ground running and the program continues.

**TOP TIP:** Lead Digital Mentors are integral to unlocking professional opportunities for new digital mentors in your community. Getting to know your fellow digital mentors is the best and easiest way to identify potential successors for this role.

**TOP TIP:** Good Things Foundation has lots of ready-made resources and training around administering your programs and delivering digital skills support. Use these as a shortcut when making your 'how-to' guide.

## More support

For more support in running your digital skills program, see our resources and support webinars at <https://goodthingsaustralia.org/>