

1. Succession Planning Template

Purpose of this document: To identify, assess, and decide on who should be the new facilitator of the group when you decide to step down or need to take time off.

Task	Documents	Who	Indicate Completed
Draft a timeline to complete the tasks below.		Facilitator/Group	Set a realistic date for departure and realistic time frame to prepare.
Identify the tasks involved in being a facilitator.	Attach task list	Facilitator	
List the skills needed.	Attach skills list	Facilitator	
Assess the existing team members' potential against the tasks and skills required to be successful.		Facilitator or group	
Discuss and agree who is interested in being the new facilitator.		Group - Rather than choosing a successor a group member might volunteer. Make sure that they have the necessary skills.	
Develop the potential team members' skills by giving them opportunities to take on tasks and/or attend training.		e.g. Facilitator - Training facilitated by Carers Victoria, or training in minute-taking or administrative skills.	
Use succession as an opportunity to review whether the group's purpose is being met and reset any changes.	Review Terms of Reference or Group's Purpose Statement	Group	
Review plans and objectives for the coming 12 months or through the transition.	Plans and objectives	Group	