

Succession planning for community heritage groups

During research into community heritage groups in Wales in 2021, one of the most common concerns that groups shared with the CBA as to their future was a lack of a “next generation” to keep the groups going. Your group may be familiar with these kind of concerns;

- Who will be chair, secretary, treasurer when the current committee members stand down?
- If our IT specialist leaves or steps down, who will run our membership database or website?
- Will we have enough members next year to pay for our room hire costs?
- Will we have enough volunteers next season to open our museum?

These are all issues around succession planning – making sure that your group has feasible, effective, and sustainable future plans.

[Supporting Communities](#), a Northern Ireland based organisation, have this quote on succession planning:

“Succession planning is about looking at where your group is now, where it needs to go and what you can do to get there. It is about putting a system in place to ensure that when someone leaves you are not left with a black hole of knowledge and expertise – and that there is someone in the wings ready to step into the that role.”

Their website has a video with case studies from community groups who have put plans in place to make their groups resilient and forward-facing <https://supportingcommunities.org/succession-planning>, as well as an excellent guide into writing your own succession plan <https://bit.ly/2KR7tzm>

The most important thing a community organisation can do to make sure it can both maintain and develop its membership and work, is to plan for the future. Whether using a guidance document like the one from Supporting Communities above, or designing your own process, it is important to have a document or collection of documents kept where the committee or members can find it easily.

Steps to smooth succession

The primary skill needed to ensure the longevity and strength of a community group is good communication between committee members and to the membership.

To navigate change – whether that be the departure of committee members, loss of a funding stream, or unprecedented circumstances like the Covid-19 pandemic – there need to be lines of communication in place that are clear, concise, and provide detailed information and guidance.

The following documents are a good guideline as to what a community group would need to ensure a strong handover of roles, good communication to all, and clear expectations for all;

- Role descriptions for all committee posts
- Role descriptions for all volunteer posts, even if you have no current vacancies or are not actively recruiting. These should be updated as new roles are developed or roles change and adapt
- Any strategic documents such as project plans, business plans, and financial forecasts (if your group has them)
- Key contacts (such as owners of any buildings used by your group, banking details, insurance companies if you have public liability or other insurance, press contacts if you have regular ones for press releases and similar announcements)

There are a few key questions you should ask when thinking about the future of your group:

1. What is stopping people from joining or stepping up to committee roles?

“Imposter Syndrome” - Often, community heritage groups are made up of passionate, dedicated individuals who have invaluable skills and experience, and people following on from their lead can feel they cannot live up to their example. Even people with significant skills and experience often feel this way – particularly if they come from a minority or marginalised background, such as people of colour, people with a disability, or LGBT+ people, who often face challenges due to conscious and unconscious biases of people they work, study, or volunteer with. Make sure that you recognise the abilities and contributions of everyone in your group, and encourage anyone to try committee roles, with mentoring if necessary to build confidence.

A lack of diversity within current committees can make potential new members feel they would either not be welcome, or that they would be acting only as a spokesperson from people who share a similar background to them. For example, women in prominent business roles are often asked to speak on their experiences as women in the boardroom, rather than their general business acumen or successes. It is important to stress commitment to equality and diversity in all of your communications with members, and act upon this commitment. See also <https://www.archaeologyuk.org/new-in-archaeology/campaigns/equality-and-diversity-hub.html>

Lack of change – change is inevitable in the world. Many community heritage groups have a strong and long standing tradition of work to preserve and promote their heritage, which can sometimes manifest in a lack of willingness to change how they approach heritage or the way the group communicates its activities and work to the wider public. However, there are challenges in changes that could mean groups risk losing members and support should they not adapt – the increasing reliance on online means of communication, the change in requirements from funding bodies on community groups, and wider socio-economic pressures such as climate change, political developments, and the economic impact of a global pandemic. Change can be enormously beneficial even though it can also be daunting – and reaching out to wider communities, to support organisations, and other community heritage groups in similar situations can help groups to build a strong plan to deal with change in a productive way.

2. What would happen if one or more of the committee were unable to fulfil their role tomorrow?

Imagine that your chair, or treasurer, or volunteer coordinator was incapacitated or had to leave on short notice. Many community heritage groups rely on the passion and skills of a few individuals to drive them forward – and these people can leave for a variety of reasons, potentially with no or very little notice. What would happen in the short, medium, and long term? It is important to plan for this as a possibility. Think about;

- Making sure similar skills and experience exist in multiple individuals in your group.
- To find out about these skills, conduct an audit of the group's experience, skills, and knowledge – and their capacity to step into committee roles if required.
- Can roles be split in a time-share type model rather than be conducted by one person?
- Who knows where all the passwords / keys / legal documents are kept?

If you cannot answer one or more of these questions, it is time to build a stronger succession plan.

3. Do you have an upcoming generation of members, supporters, and committee members?

Recruiting young members is vital to sustain a community group. If you are struggling with this, you could try a few options:

- Develop a “youth board” so younger people have a voice in your group
- Invite young people from local schools or youth focused organisations to consult with you and why they aren't currently engaged and what they'd need to get involved. Young people face pressures on their time and often need something that makes it worthwhile beyond it being a hobby or interest – can they gain vital experience as a committee member, transferrable skills, recognised hours towards an accredited scheme such as Millennium Volunteers <http://youngcitizens.volunteernow.co.uk/millennium-volunteers>? Consider ways you can “add value” to your members and committee.
- Consider developing a joint event with a local school or youth group, or even skills swap such as helping young farmers research the history of their village or farms whilst they act as ‘social media mentors’ for the group.

Not your usual heritage – Increasing diversity to create sustainability

There have been several successful projects in recent years that highlight the importance of approaching heritage in different ways to ensure engagement with diverse audiences. This diversity leads to future sustainability of heritage groups – from community led ones to national organisations – as it means that stakeholders from groups across society are invested in heritage and supporting, researching, working, volunteering or engaging with in the future.

When designing projects or looking at the focus of your group, consider – who is it for? Who are we missing? Who could we work with to ensure our heritage is preserved and is relevant to future generations?

Some case studies:

- Unloved Heritage Project - <https://unlovedheritage.wales/>
- <https://happymuseumproject.org/resources/case-studies/>
- <https://www.communityarchives.org.uk/content/resources/resources/resources-produced-by-cahg/impact-of-community-archives-getting-started/case-studies>
- https://pure.ulster.ac.uk/ws/portalfiles/portal/92238525/8791_Article_Text_29279_1_10_20210511.pdf
- <https://umbraco.historicengland.org.uk/research/current/social-and-economic-research/wellbeing/wellbeing-and-heritage-case-studies/>