**Succession Planning Guidebook**

Succession planning is vital for grassroots sports organisations to ensure stability, continuity, and long-term success. These clubs often rely heavily on volunteers, and without a plan in place, the departure of key individuals can leave significant gaps in leadership, knowledge, and operations. By identifying and preparing future leaders early, clubs can maintain momentum, preserve institutional knowledge, and reduce the risk of burnout among long-term volunteers. Ultimately, succession planning helps create a sustainable and resilient organisation that can continue to grow and serve its community well into the future.

This Document will provide an incoming committee member or volunteer with all the info needed to take on the role.

Fill this Document out to the best of your ability, and ensure it is shared with multiple people at your organisation.

If you don’t know an answer, try your best to find and document the answer, rather than skipping the question.

This Document was updated on \_\_/\_\_/\_\_\_ by \_\_\_\_\_\_\_\_\_\_\_\_

Contact Details:

# Role Overview

Role Title:

Current Position Holder, email and phone number:

Previous known position holders and contact information:



Purpose of the position:

(eg. The Treasurer is responsible for managing the club’s finances, including budgeting, record-keeping, and ensuring bills and obligations are paid on time. They provide financial updates to help the committee make informed decisions and keep the club financially healthy and accountable.)

Reports to:

Direct Reports, if any (who reports to you):

Key Responsibilities:



Full Position Description, or link to Position Description:

Procedural/’How to’ Documents:

# Time Commitment

Approximate hours per week:

Additional Hours to expect in busy periods, and timing of busy periods:

Key Dates (eg. AGM, tax payments, reporting to council, etc.):

Additional Information:

# Key Tasks

Daily Tasks:



Weekly Tasks:



Monthly Tasks:



Quarterly/Seasonal Tasks:



Yearly Tasks



# Accounts and Passwords

Provide the account email address and password for the accounts below:

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| --- | --- | --- |
| Account | Email/Username | Password |
| Position Email Adress |  |  |
| Facebook |  |  |
| Instagram |  |  |
| Accounting Software |  |  |
| Website |  |  |
| Game Plan |  |  |
| Peak Body Portals |  |  |
| Online Storage Drives |  |  |
| PlayHQ |  |  |
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# Key Documents, Systems and Storage

Where are Key Documents Stored? (eg. policies, by-laws, procedures)

Commonly used platforms? (eg. PlayHQ, Whatsapp, etc.)



Ensure that logins are accounted for in section 4.

Where is other login/password information stored?

Who has access to the storage, systems and platforms mentioned above?

Link or file containing all policies and procedures:

# Important Contacts

Committee members:

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| Name | Position | Email | Phone |
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Notes:

Former Committee members:

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| Name | Position | Email | Phone |
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Organisation Volunteers:

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| Name | Position | Email | Phone |
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Senior Coaches and Players:

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| Name | Position | Email | Phone |
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Notes:

Council and Venue contacts:

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| Name | Position/Organisation | Email | Phone |
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Notes:

National, State, Regional Sporting Body and League contacts:

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| --- | --- | --- | --- |
| Name | Position/Organisation | Email | Phone |
| Office | GippSport, gippsport.com.au | info@gippsport.com.au | 5176 3020 |
| Trevor Priest | Sports Hub Administrator, GippSport | [trevor@gippsport.com.au](mailto:trevor@gippsport.com.au) | 0474 003 312 |
| Gene Parini | Baw Baw Programs Coordinator, GippSport | [gene@gippsport.com.au](mailto:gene@gippsport.com.au) | 0428 358 335 |
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Notes:

Sponsors:

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| Name | Position/Organisation | Email | Phone |
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Suppliers:

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| Name | Position/Organisation | Email | Phone |
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Notes:

Others:

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| Name | Position/Organisation | Email | Phone |
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Notes:

# Events and Calendar:

Season Dates:

Major events:

Yearly responsibilities:

# Advice

What I wish I’d known on day one:



Common Challenges and how to manage them:

Suggestions for improvement:

Other advice for smooth sailing:

# Current Tasks, Issues and Priorities

Outstanding tasks or projects:

Upcoming Deadlines:

Current challenges/issues:

Priorities for your role and organisation:

# Resources and Equipment:

Club equipment held:

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| --- | --- | --- | --- |
| Equipment | Location | Maintenance required | Procedures (eg. check out, use) |
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Small appliances held:

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| Equipment | Location | Maintenance required | Procedures (eg. check out, use) |
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Keys, locks and other access items:

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| Item | Accesses | Notes |
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# Policies and Compliance

Child Safety Tracking Procedure and Processes:

Must Read Policies (with location or link):



# Communication

Committee’s preferred communication platforms:



Communication to members platforms:



Location of branding and messaging guidelines:

# Role Specific Resources

Frequently used Software:



Frequently used Templates:



Helpful Training Resources:



Additional Resources and Links:



# Suggested Training Process

Please outline a short suggested training plan for the incoming volunteer.

For example, what processes or software should the departing volunteer and the new volunteer practice using together? What game day tasks should the volunteers complete together to ensure the new volunteer is set up for success?

Thanks for your contribution to community sport!