

Volunteer Trustee Development Network



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An Roinn Breisoideachais agus Ardoideachais, Taighde, Nuálaíochta agus Eolaíochta
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Waterford Volunteer Centre

Ionad d'Obair Dheonach Port Lairge

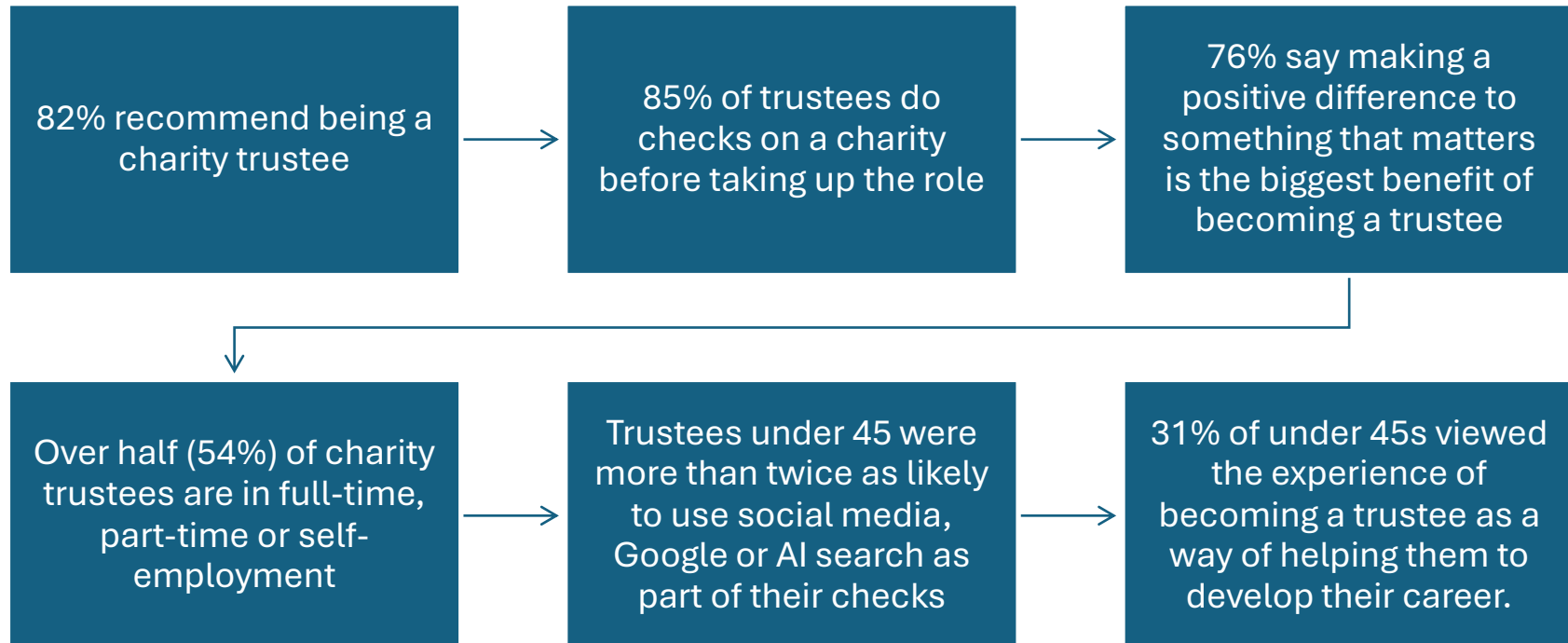


Succession Planning in Community and Voluntary Organisations

*"No surprises, no single points of failure,
and a steady flow of new people."*



The Charities Regulator Survey of Trustees





Succession planning is now a critical risk area, not a future issue.

The survey highlights that around one-third of charities report difficulties with succession planning and attracting new trustees. The proportion is considerably higher in smaller organisations.

Succession is no longer a “nice-to-have” governance practice—it is a live operational risk. Boards that fail to plan for turnover risk:

- Loss of quorum or required skillsets
- Governance non-compliance
- Over-reliance on a small number of individuals

In practice, succession planning must be treated as part of risk management and regulatory compliance, not just board development.



Persistent recruitment challenges require more proactive and strategic pipelines.

The survey indicates ongoing difficulty in **recruiting new trustees**, particularly those with specialist skills (finance, legal, governance).

Passive recruitment (word-of-mouth, existing networks) is no longer sufficient. Boards need:

- **Skills audits** linked to future needs
- Targeted recruitment campaigns
- Engagement with underrepresented groups

Succession planning must shift from replacement-based to pipeline-based planning i.e. always cultivating future trustees.



Skills gaps mean succession must include capability building, not just replacement.

The survey notes that **many trustees lack formal training** in areas like financial oversight and legal duties.

Replacing trustees “like-for-like” is inadequate if the overall board capability is weak. Succession planning must include:

- Structured **induction programmes**
- Ongoing **training and mentoring**
- Identification of **future board leaders (e.g., chairs, treasurers)**

This reframes succession as leadership development, not just turnover management.



Over-reliance on key individuals increases the urgency of planned succession.

Wider regulatory evidence shows governance concerns often involve “**dominant individuals**” exerting excessive control.

Poor succession planning can entrench dependency on founders, chairs, or CEOs. This creates:

- Governance risk
- Reduced accountability
- Fragility if that individual exits suddenly

Effective succession planning must include term limits, role rotation and deputy/vice roles to build bench strength.



Increased regulatory scrutiny and public trust concerns heighten expectations.

The survey and related research show governance issues are the largest category of concerns raised to the regulator. Public trust is sensitive to transparency and governance quality.

Weak succession planning can undermine:

- Governance continuity
- Accountability
- Public confidence

Boards must demonstrate visible governance robustness, including documented succession plans, transparent appointment processes and regular board renewal.



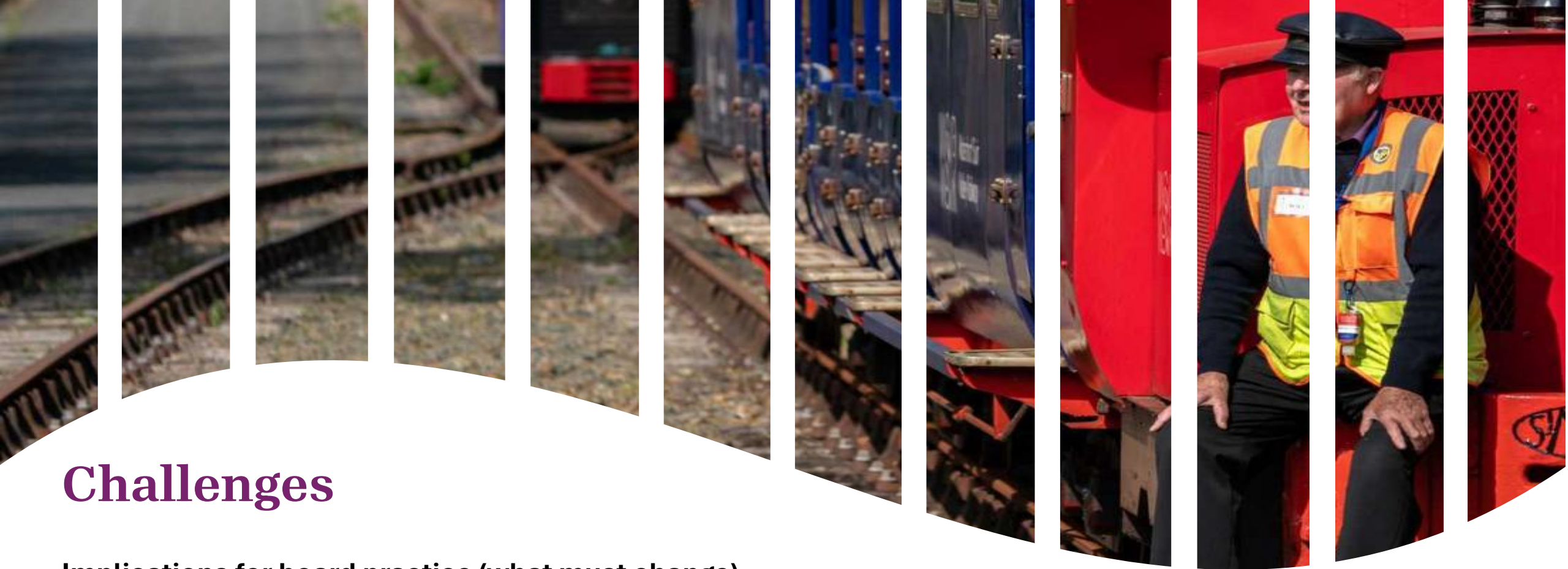
Resource constraints in smaller charities make succession harder - but more necessary.

The survey highlights financial and operational pressures, especially among smaller organisations.

Smaller charities often:

- Depend on long-serving volunteers
- Lack HR/governance infrastructure
- Are the most vulnerable to succession shocks.

This creates a paradox:
Least capacity → greatest need for structured succession planning



Challenges

Implications for board practice (what must change)

Drawing these strands together, the survey implies that Irish charity boards should move toward:

Formalised succession planning

Written succession plans for Chair, Treasurer, and key committee roles



Challenges

Implications for board practice (what must change)

Continuous renewal cycles

- Staggered terms
- Planned turnover (not crisis-driven replacement)



Challenges

Implications for board practice (what must change)

Skills-based governance

- Regular **board skills audits**
- Recruitment aligned to strategic priorities

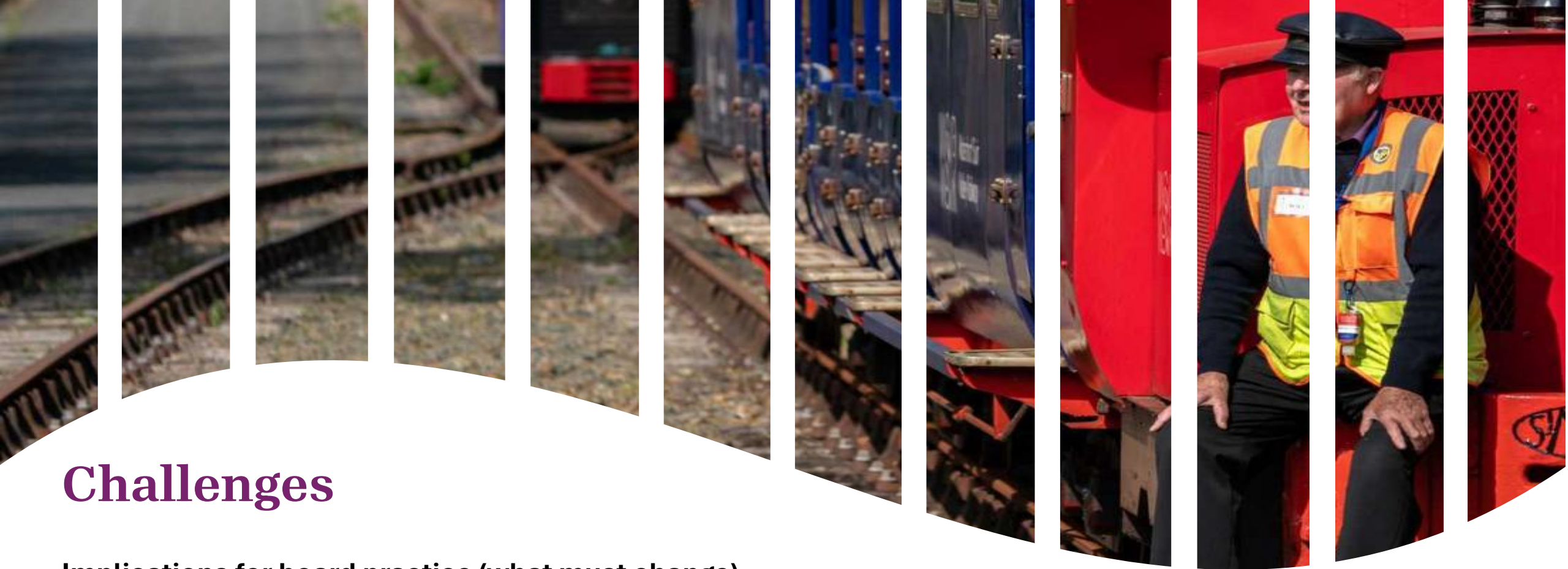


Challenges

Implications for board practice (what must change)

Trustee pipeline development

- Shadowing / subcommittees
- Engagement of younger or first-time trustees



Challenges

Implications for board practice (what must change)

Governance culture shift

- From “lifetime volunteering” → time-bound, skills-based contribution



Opportunities

Remote and Flexible Work

Skill-Based Volunteering

Corporate Social Responsibility

Gig Economy and Short-Term Commitments

Emphasis on Diversity, Equity, and Inclusion

Increased Use of Technology

Youth Engagement



What next?

Have a plan

The aim is to identify and develop potential future leaders within your organisation or outside it, so that when the time comes for your talent to move on, there are capable hands ready to take the reins.

What next?

Assign responsibility

Document essential knowledge

Map your skills

Develop your people pipeline

Establish an onboarding process



ASSIGN

The first step in the process must be for someone to take responsibility. If you do not already have a plan then put succession planning on your agenda and assign roles or responsibilities to ensure that the issue is live.

DOCUMENT

There are people in your group or organisation who hold invaluable institutional memory. Create simple handover documents covering key relationships, historical context, and “unwritten rules” that make your charity tick. This knowledge shouldn’t walk out the door with departing members or trustees.

MAP

Create simple profiles noting each person’s expertise, length of service, and anticipated departure date. This exercise often reveals gaps you hadn’t noticed and helps identify which skills you’ll need to recruit for next.

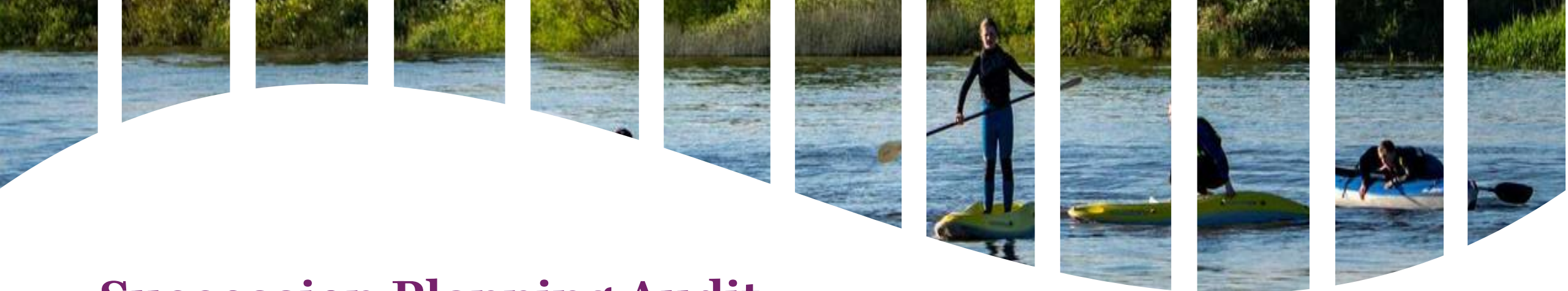
DEVELOP

Look beyond formal recruitment. Consider those who might grow into trustee or leadership roles with proper development. Leadership skills can be developed – look for commitment and values alignment alongside technical expertise.

ESTABLISH

Onboarding is a multi-step process that helps new members of your group or board familiarize themselves with basic operations, so they can get to work quickly.

Establish an onboarding process



Succession Planning Audit Questionnaire

This questionnaire asks some pertinent questions about your organisation's current readiness for succession planning, and provides a rating based on your score. Use the questionnaire as a tool for occasionally measuring your distance travelled toward your goal. The results should be used as a focus for your discussions and meetings around the topic.



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