

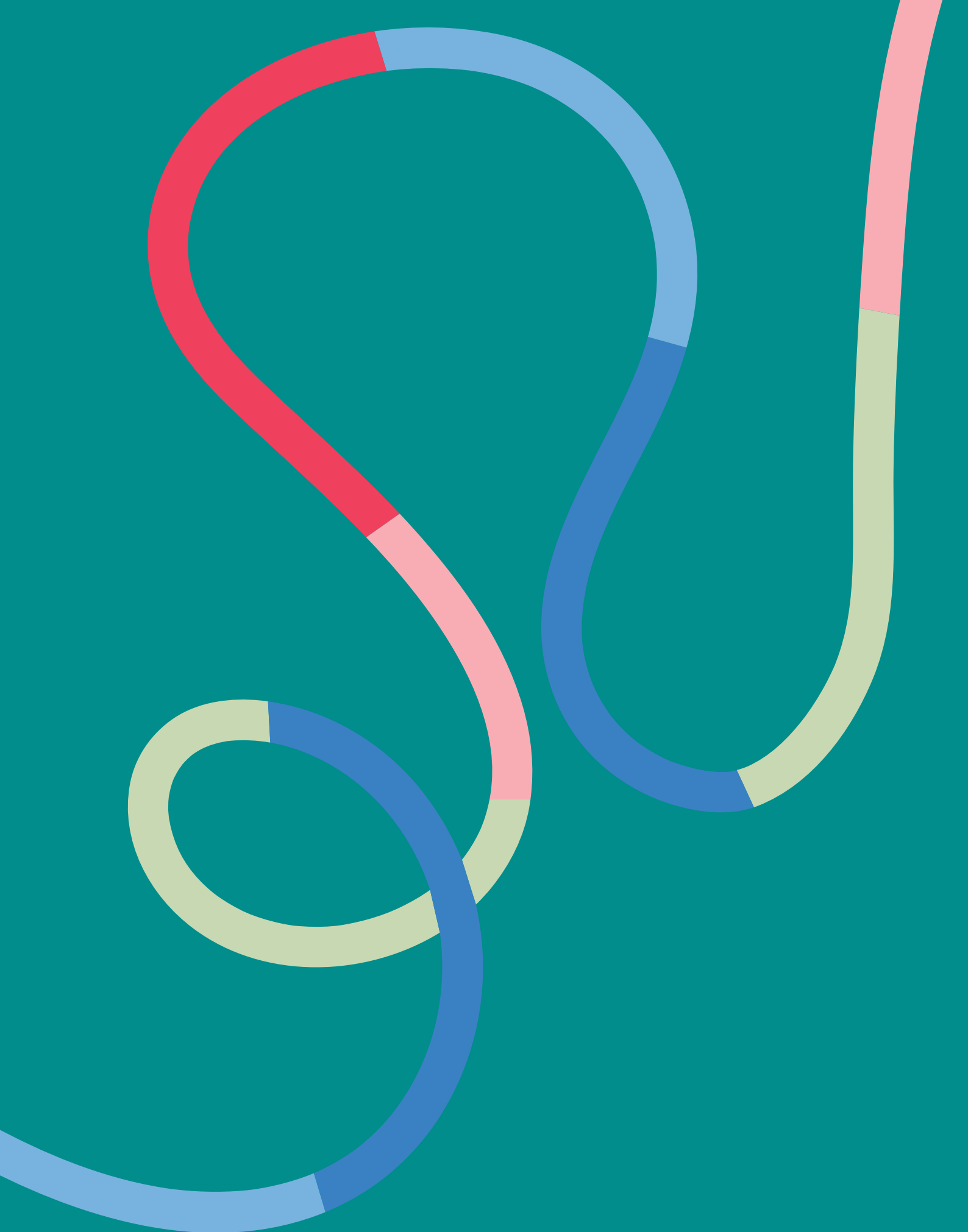


IRISH
COMMUNITY
ARCHIVE
NETWORK

Succession Planning:

**A Guide for Community
Archives & Heritage Groups**

A publication by the Irish Community Archive Network



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Introduction



Overview

This Succession Planning Guide is designed for community archives and heritage groups wanting to future-proof their group membership, websites, and social media accounts. Eventualities such as members retiring unexpectedly or stepping-back for personal reasons can impact on future sustainability.

Most community archiving projects are run by volunteers and getting new people on board can be a constant challenge. This guide provides a structured approach to forward-planning, which if carried out on an annual basis, will help to ensure that your group is maintained and continues to thrive.

Websites take a lot of time, money, and energy to develop and maintain, and form an important record of a group's history and heritage and related activities. This guide also offers groups some simple measures to protect the viability of websites which can be adapted for social media accounts.

Background

This resource has been developed in response to concerns about the long-term sustainability of the community groups and archive websites in the Irish Community Archive Network (iCAN). Ensuring that volunteers can continue to access their websites into the future, as well as the ongoing feasibility of the volunteer group itself, are priority issues for our members. We believe that these concerns are shared by many other volunteer bodies across Ireland, the UK and elsewhere.

Having identified these challenges, iCAN members have drawn on their experience, contributing their thoughts and ideas to the guidelines, audits and checklists that comprise this guide. We invited the Community Archives & Heritage Group (CAHG, UK & Ireland) to provide feedback and their comments and suggestions have been invaluable for ensuring the relevance of the final resource to the wider CAHG community.



The Irish Community Archive Network

iCAN supports volunteer groups across Ireland to develop and maintain their own community archive. With much of Ireland's material and intangible cultural heritage in the care and ownership of its citizens at home and abroad, iCAN is empowering local communities to document their own history, heritage and culture on digital platforms.

iCAN is a National Museum of Ireland initiative delivered in partnership with The Heritage Council, participating Local Authorities and community groups across Ireland.

For more information on iCAN visit
www.ouririshheritage.org



Part One:

Succession Planning: Community Groups

Succession planning is crucial for the sustainability of your community group. It can be difficult to recruit new volunteers and to ensure that knowledge and expertise are retained within the group if someone was to leave. Ideally, you will have members who are adaptable to different roles, and training can provide the skills needed for the group to continue working seamlessly into the future.

Steps for Succession Planning

Here are 6 steps to consider when drawing up a succession plan:

1. Identify your long-term goals and define your objectives.
2. Create a task list from these objectives.
3. Identify the likely development of the group over the next 3 years.
4. Identify what skills will be required in the next 3 years.
5. Match members to these required skills and create training plans.
6. Draw conclusions and make recommendations.

Use the **template** on **pages 23 & 24** to start building your Succession Plan.

Procedures

A good way to ensure that your group can continue to operate after losing a member is to have written operational procedures. These should include documents that outline the day to day running of your group, committee roles and contact details of important services and partners, for example, banking, insurance, landlord and legal.

Additionally, when thinking about safeguarding your research and ongoing projects, consider using a cloud-based storage facility, where you can save and share information.

Recruiting New Members

If you struggle to recruit new volunteers, think about what is stopping people from joining your group. Some people may feel that they don't have the skills you require, so communicating a range of ways new volunteers can get involved will help. Retaining current members is just as important as new recruitment, so recognise the abilities and contributions of everyone in your group and encourage all members to try the different committee roles.

Communication is key:

- Ensure good communication between committee members and wider group membership.
- Have clear and concise lines of communication.
- Members feel more valued when they are included in decision-making.

Providing training in all aspects of your operations is important, particularly for new members. When seeking new volunteers stress your commitment to equality and diversity and don't be afraid to embrace change as change can bring huge benefits.

Commitment to time is often a deciding factor in joining a group. If time is a concern to members and potential new members, think about sharing roles and splitting workloads to alleviate concerns. If your group is able to offer expenses or other benefits make sure to highlight these.

Getting Young People Involved

To attract new volunteers, advertising for a limited and specific time commitment (e.g. 2 hours a week for 6 months) for a defined task (e.g. transcribing oral histories or cataloguing a set of records) could attract those with limited time to offer. This has the potential to get new volunteers engaged with your work and group, and if they enjoy the experience, they may decide to extend their volunteering beyond the original task/timeframe.

Another approach is to offer a reciprocal deal, for example, could your group research a family's history or develop a heritage interpretation in return for membership?

Highlighting that volunteers can contribute their time online: researching, drafting articles, transcribing, or becoming an editor of your website or a social media administrator can attract those living further afield. Several iCAN groups have committee members residing in the USA and Australia that attend online meetings and work on specific projects.

Encouraging young people could be key to sustaining your group. Consider inviting post-primary schools or organisations (such as Foróige, No Name Clubs and Scouts) to find out more about your group. Propose to work together on a youth-led project. It may be possible to develop an accredited scheme with your local college or university. Colleges and Universities often have annual volunteer recruitment fairs which you may wish to take part in. You may like to consider setting up a Youth Committee to recruit and empower young people. Highlight that you can provide skills and opportunities for career progression. The key to attracting young people (and in fact all volunteers) is to communicate the potential benefits, be welcoming and interactive, and make it fun!

It is good practice to have a structured recruitment process for volunteers with role descriptions, so this can be utilised if urgent recruitment is required. It is important to keep the processes up to date.



Using Social Media to Attract Members to Your Group

Social media can be a great tool that can enable you to attract members to your group, with the potential to reach audiences locally, nationally and even internationally.

Some roles within your organisation may have the potential to be performed remotely, and you may find members from all over the world eager to contribute their skills.

When promoting opportunities, or developing campaigns to attract members, present information with a warm, positive and engaging tone and break information down into different volunteering opportunities, broadening the appeal to people with different interests, skills and time commitments.

Advertise and promote your campaigns by connecting, messaging, tagging and reaching out to similar organisations and engage with your followers to keep your page relevant and visible.

Auditing

An audit is a way of systematically checking that your group is running effectively by gathering information, questioning, and clarifying. Auditing your group can facilitate learning and increase performance. It is recommended that you audit your group on an annual basis to check your skills, resources and behaviours. In order to create a baseline, it's a good idea to standardise your paperwork and procedures.

Start your audit by gathering information, if it is not your first, start by checking your previous year's audit and see what you have implemented since then. Have a standard set of tools and materials to carry out an audit (see form and checklist provided on [pages 13 and 14](#)). To carry out your audit, test your procedures by observation, inquiry or inspection. For example, test the skill set of your members or test if your procedures are fit for purpose. Stick with the information you are auditing, do not go off course. When you have completed your audit take a note of actions and remember an audit is not just a box ticking exercise. Ensure your records match the reality of your group. Work towards signing off on your actions and share your results with members. Some example templates are provided throughout this guide.

iCAN members learn a great deal from each other, so remember to reach out to other groups to access their experience, skills and advice.

Additional Recording Keeping

After completion of your audit, you may have identified a need to keep records of various other tasks relevant to your organisation. The table, on [page 11](#), can serve as a template to be filled out and adapted as needed by your organisation. For example,

- The names and roles of individuals who make up your organisation.
- The delegation of tasks and projects.
- Where important information is saved or filed, and who has access to keys or passwords.
- Project management of publications & articles.
- Management of facilitators, contractors or vendors frequently used by your organisation.

Additionally, on [pages 8 to 10](#), you will find some blank checklists with sample headings, these can be photocopied or downloaded as needed.

Record Keeping Committee Roles and Skills

Name	Role	Skills	Possible Tasks for Assignment

Print name: _____

Sign: _____

Date: _____

Notes: _____

Record Keeping Resources and Equipment

Resource/ Equipment	Saved/Located	Managed by	Back up location

Print name: _____

Sign: _____

Date: _____

Notes: _____

Record Keeping **Projects and Activities**

Project	Assigned to	Description of work involved	Completion Date

Print name: _____

Notes: _____

Sign: _____

Date: _____

Record Keeping **Blank Template**

Print name: _____

Sign: _____

Date: _____

Notes: _____



Community Group Succession Planning - Toolkit

Group Audit checklist [page 13](#).

Group Audit form [page 14](#).

Group Succession Plan template [pages 23 & 24](#).

Group Audit Checklist:

This checklist should be reviewed and updated on an annual basis.

Group secretary to include on the agenda of the first meeting in the current year.

Assigned to	Yes	No
Does my group have a committee?		
What term of office do committee members have?		
Do committee members have clearly defined and agreed roles?		
Does my group have a rotation of service?		
Does my group have a documented election process?		
Does my group have operational procedures?		
Does my group have a training and skills development plan?		
Does my group have a decision-making procedure?		
Does my group have a training and skills development plan?		
Does my group have a recruitment plan / procedure?		
Does my group have a training and skills development plan?		
Does my group have a succession plan for its Website / Social Media accounts?		

Print name: _____

Sign: _____

Date: _____

Group Audit Form:

Heading	Checked	Date	Action
Committee and roles			
Documented election process			
Term of office / Rotation of service			
Decision making procedure			
Operational procedures			
Training and development plan			
Recruitment plan / procedure			
Diversity			
Group succession plan			
Website succession plan			
Any other business			

Print name: _____

Sign: _____

Date: _____



Part Two:

Succession Planning: Websites

In this digital age, many community groups have a website, digital archive or social media channels to promote their work and to engage people with their collections and activities. A website can be an effective platform for extending a group's reach beyond traditional boundaries and communicating their message to people residing in other countries, and on other continents.

We have found that it often falls to one or two members of a group to administer a community website, usually on a voluntary basis. So, we have been asking ourselves - what happens if for some reason, these key people suddenly become unavailable? Would we know the passwords for the website and associated email? Would we know the details of the domain registration or hosting arrangements? It is easy to see that groups could find themselves effectively blocked from their website or social media accounts and unable to respond to enquiries. In a worst-case scenario, the website's hosting agreement could expire, the website disappears, and no-one has any idea how to rectify the situation.



Website Succession Planning - Toolkit

Audit checklist & form [pages 18 to 21](#).

You can also use the Website Succession Planning Toolkit for your social media channels.

Record Keeping Website

This form should be reviewed and updated on an annual basis.

Group secretary to include on the agenda of the first meeting in the current year.

Checklist

Website URL:

Website Administrator or Webmaster Contact details

Name:

Phone:

Email:

Username and Passwords

It is best to avoid changing website and email login details (except for security reasons). If a change is made between review periods, the Website Administrator should inform the Secretary and request that the log in details are updated on this form. The Secretary should sign and date the updated details.



Checklist

Website Administrator or Webmaster Log in

Username:

Password:

Change to Log in Details:

Date:

Username:

Password:

Signature:

Website Email Log in

Email Address:

Username:

Password:

Change to Log in Details:

Date:

Username:

Password:

Signature:

Checklist

Hosting Company

Company Name:

Contact Person:

Phone:

Email:

Web Address:

Account Username:

Account Password:

Annual Renewal Date:

Group Member with responsibility for liaising with hosting company

Name:

Phone:

Email:

Group contact details used by the hosting company:

Is this the same as the website email? Yes / No

If **no**, please update the contact details to match those above (Web Administrator).

If needed, minute an action to be completed before the next meeting and record below.

Checklist

Hosting Company provided with updated contact details

Date:

Signed:

Date the hosting company was last contacted:

If it has been over 12 months since contacting the hosting company, minute an action to be completed before the next meeting, and record below.

Date the hosting company was contacted (since the last meeting):

Record any changes to hosting services/charges:

Please attach any correspondence or documentation relating to the hosting arrangements to this checklist.

Website Domain (URL) Renewal

Is your hosting company responsible for renewing your website's domain each year? Yes / No

If **yes**, no further action is required.

If **no**, please note the domain renewal details below:

Checklist

Domain Registration Company Details (e.g. LetsHost; Register356)

Company Name:

Web Address:

Phone:

Email:

Annual Renewal Date:

Annual Renewal Fee:

Payment Method:

User Account Log in

Username:

Password:

Webmaster & Editor Contact Details

Make a note of your Website Editors' contact details on [page 22](#).

Website Editor Contact Details

Website Editor:

Name:

Phone:

Email:

Website Editor:

Name:

Phone:

Email:

Website Editor:

Name:

Phone:

Email:

Website Editor:

Name:

Phone:

Email:

Website Editor:

Name:

Phone:

Email:

Succession Planning Template

Period of plan: _____

We recommend developing a three-year plan.

Our long-term goals

- Bullet list your high-level goals for the next three years.
- Completing this plan will help you gauge whether your goal setting is realistic and achievable.

Our objectives

- Identify and bullet list the concrete steps / tasks needed to deliver on each goal
- Identify the skills required to deliver on each of the tasks

Likely development of the group over next three years

Talk to each committee member and note the following in the table, e.g.:

Name	Intends to stay on for period of plan <small>(notwithstanding unexpected eventualities)</small>	Skills	Preferred work/ tasks	Actions needed
John Smyth	Yes	Digital skills	Digitisation, social media & website	none
Mary Green	For 2 years	Conducting & transcribing oral history interviews	Oral histories	Will need to find someone to replace / train in year 2
Tom Grey	Yes, as long as health is good	Archival skills	Records care & management	Tom to start mentoring / training a member
Jessica Leach	No, intends to retire next year	Finance / legal	Treasurer	Need to find a replacement this year.

Please see blank version of this template on [page 24](#).

Skills we need over the next three years

- Match the skills needed to deliver your objectives with those available on the committee.
- Identify and note any current or potential future gaps in the skills required.
- Use what you have learned as the basis of your recruitment and training plans.

Recommendations

- Bullet list your recommendations.
- Bring the plan to your next committee meeting for discussion and adoption.
- Review the plan and the progress made at the first / second meeting each year.

Conclusions

Note what you have learned about your group's capacity to deliver on your goals over the next 3 years.

Group Development Template

Name	Intends to stay on for period of plan	Skills	Preferred work/tasks	Actions needed

Plan adopted on: _____

Print name: _____

Sign: _____

Date: _____



Want to Find Out More about The Irish Community Archive Network?

The Irish Community Archive Network's (iCAN)
contact details are as follows:



For general email inquiries email:
ouririshheritage@gmail.com



Our Irish Heritage Website:
www.ouririshheritage.org



Twitter: [@ItsOurHeritage](https://twitter.com/ItsOurHeritage)



Facebook: www.facebook.com/OurIrishHeritage