Succession Planning: Online Community Learning Exchange 2025

InspirAlba partnered with DTAS, and the Scottish Community Alliance to host another cross-sector community learning exchange with a focus on the topic of succession planning. This event was held online on 18th March 2025, Tuesday from 2:00 PM to 4:00 PM and had an attendance of 38 people representing different third sector organisations from rural Scotland.

There is a lack of a clear strategy for leadership transitions in the third sector, particularly in rural areas. While the rural communities are facing major challenges in terms of depopulation and aging demographics, the future of most socially driven organisations lies as a question mark. The risk of losing valuable knowledge, stability, and momentum for these organisations is a real concern. So, this learning exchange focused on discussions to empower ideas and develop creative solutions to prepare for the future.

Presentation 1 – InspirAlba | Ailsa Clark

InspirAlba, being a social enterprise from Campbeltown, a rural town in Argyll and Bute, has been proactive in promoting access and progression routes by creating space for younger generations. By using modern apprenticeships and graduate apprenticeships, they support young people to gain skills and employment opportunities within their local communities.

During the presentation, Ailsa Clark highlighted the importance of succession planning to sustain social enterprises as they are vital for the rural economy. Succession planning comes with several challenges, including limited funding for initiatives, difficulties in retaining young talent in rural areas, where many young people migrate to cities for education. When they graduate, they often have valuable skills but also significant financial debt. This along with lack of local economic context in the curriculum results in young people not being able to return to work in the rural economy with the qualifications they have gained.

There is a lack of structured mentorship and leadership development programs for the young people which leads to the risk of burnout among existing leaders due to high workloads and responsibilities. Another key challenge is the transfer of knowledge, as many small organisations do not store information or knowledge in a way that would allow someone to easily take over if needed. This lack of knowledge management can

create a gap when succession occurs.

Aimee began her career with InspirAlba four years ago through an employability placement. She then progressed to Rural Social Enterprise Coordinator and is now the Rural Social Enterprise Manager. She is also on secondment with the national organisation, Social Enterprise Scotland as a Membership Officer. Sam, currently on a graduate placement, now works as a Digital Coordinator. He has developed skills in website management and impactful writing and looks forward to further training in project management. As someone who is not from an English speaking country, Sam faced difficulties finding a job despite holding a master's degree from the UK and having relevant experience in the field. This placement has given him the opportunity to gain valuable skills, expand his knowledge, and regain his confidence while also progressing towards a longer term role within the organisation. InspirAlba also hopes to sponsor Sam's visa but faces challenges due to recent changes in the minimum earnings threshold.

Along with them, the Inspiralba team is largely made up of people under 30, with three others on graduate apprenticeship, modern apprenticeship and work based professional qualifications in finance, digital applications, administration and business management, all of whom are paid.

InspirAlba serves as an example of overcoming these challenges by engaging with young people through training and mentorship, preparing them for leadership roles and fostering a sustainable future for leadership development.

Presentation Video – InspirAlba

Video – Access and Progression Routes

Presentation 2 – Tarbert Harbour | Pauline Laycock

Tarbert Harbour Authority is a trust port and social enterprise that has been in operation since 1912. With a workforce of eight to nine fulltime staff and seven volunteer trustees, the Harbour Authority balances both paid staff and volunteer governance. The organisation employs additional staff during peak seasons, but the core team is responsible for overseeing the operations of the harbour.

Succession Planning is one of the core priorities of Tarbert Harbour Authority as they are committed to workforce development, ensuring the harbour operates smoothly and continues to thrive for future generations. The Harbour Authority has a small yet dedicated team, with staff members who have been with the organisation for many years. Pauline Laycock, the Harbour Administrator, has worked at the Harbour Authority for 16 years. The Harbour Master, who plays a key role in daily operations, has

been with the organisation for four years. Other long standing staff members include those who have been with the organisation for 10 and 12 years, creating a wealth of experience within the team.

In addition to staff, the Harbour Authority is governed by seven trustees, all volunteers who serve staggered terms. These trustees provide essential governance and strategic oversight for succession planning. However, recruiting trustees can be challenging, particularly in a rural village, where volunteer opportunities are limited. Despite these challenges, the Harbour Authority has found success in identifying key skills such as finance and fisheries management for these roles, ensuring there is a broad range of experience on the board.

A significant challenge at Tarbert Harbour Authority is the difficulty of succession planning in a rural community. Due to the size of the local labour pool, recruiting new staff and trustees can be challenging. When vacancies occur, the Harbour Authority sometimes faces the difficulty of receiving only a few applications.

Over the years, Tarber Harbour has identified employability scheme, and graduate apprenticeships as key working strategies in succession planning as it also promotes workforce development. One of their staff members, Becky came into the team through an employability scheme and is now completing her 10th year with Tarbert Harbour. Another example is, Shannon, who completed a graduate apprenticeship programme that led to a degree in business management, which is directly applicable to the operations of the harbour. Other employees have also undergone specialised training, such as forklift driving and marine operator skills.

The Harbour Authority also prioritises mentoring and job rotation. For example, the Harbour Master was mentored by the previous Harbour Master for two years before taking over the role, ensuring continuity and the transfer of valuable knowledge. This practice helps to mitigate the risks of knowledge loss and supports the development of future leaders within the organisation.

Video – Tarbert Harbour Presentation

Presentation 3 – Galson Estate Trust | Jemma MacVicar

Galson Estate Trust is a community owned land trust managing a 56,000 acre estate located in the northwest of the Isle of Lewis. The Trust's mission is focused on sustainability, community development, and enhancing the wellbeing of the local population, which comprises just under 2,000 people spread across 22 townships. Governed by a board of 8 volunteer board directors from the local community, Galson Estate Trust employs 15 dedicated staff members to manage and develop the estate, ensuring its longterm sustainability and prosperity.

The Trust operates around four core strategic priorities, which guide its initiatives:

1. **Sustainable Land Use:** Galson Estate Trust prioritises responsible land management practices, fostering a balanced approach to conservation and development. Sustainable land use is central to the Trust's goals, aiming to ensure the long-term health of the estate's natural resources.
2. **Care and Wellbeing:** The Trust is dedicated to supporting the community's health and prosperity, with a particular focus on providing for the elderly while also ensuring a strong future for younger generations. Programs are developed to meet the needs of all residents across the estate.
3. **Tourism Development and Economic Growth:** To develop the tourism infrastructure to attract visitors and encourage longer stays. These efforts are crucial for boosting the local economy and creating new opportunities for businesses and individuals on the Isle of Lewis.
4. **Youth Engagement and Education:** With initiatives designed to engage the younger generation, the Trust offers educational and employment opportunities, helping young people gain the skills they need to contribute to the community's future. This includes support through transition programs and hands on learning experiences.

As a rural estate with a small population, Galson Estate Trust also faces certain challenges in ensuring the sustainability of the community. These challenges include:

- **Service Reductions:** The concentration of services in the main towns often leaves rural areas underserved, making it difficult for people in remote townships to access essential services.
- **Youth Migration:** Many young people move to the mainland for education or employment, which leads to a decline in the younger population and an aging community.
- **Limited Housing and Employment Opportunities:** The lack of affordable housing and local employment prospects are significant barriers to long-term retention of both families and skilled workers.

In response to these challenges, Galson Estate Trust has introduced several initiatives to support community resilience, such as offering apprenticeships and working with schools to provide career guidance and training. The Trust also actively works on improving housing availability and attracting new businesses to the area to create more local job opportunities.

One success story is that of Catherine, the first apprentice in community development from the Western Isles, joined as part of a summer placement programme who has since gone on to work in the renewable energy sector and getting an additional training

in project management. This is just one example of the Trust's success in supporting young people as they transition into their careers.

Galson Estate Trust also hosts student placements and summer camps, where university students can gain practical experience while contributing to conservation and development projects, such as invasive species management and deer management. These initiatives help equip young people with both hands on experience and a sense of responsibility for the estate's future.

Presentation Slides – Galson Estate Trust

Video – Galson Estate Trust Presentation

Video – Youth Opportunities at Galson Estate Trust