



SUCCESSION PLAN

For WHCCA Information Resources

Abstract

This Succession Plan ensures continuity of access to WHCCA information, in the event of key personnel changes or unavailability

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Succession Plan

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1. Purpose

The purpose of this succession plan is to ensure the continuity of databases, and Google Drive management in the event of key personnel changes or unavailability. This plan aims to identify and prepare individuals to take over critical responsibilities to maintain seamless operations.

2. Scope

This plan applies to all WHCCA Board Members, and designated volunteers, responsible for the management and maintenance of organizational databases and Google Drive.

3. Key Roles and Responsibilities

3.1 Database Administrator (DBA):

Databases: Structured systems managed by the Association for storing homeowner records, financial data, and other operational information.

The primary database for WHCCA is the **ORION** application. ORION is the acronym for “**O**rganized **R**esidential **I**nformation and **O**perations **N**etwork.” ORION supports Contact

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Management, Emergency Preparedness and Payment activities. ORION utilizes the Airtable “Infrastructure As A Service (IAAS)” platform. Airtable maintains daily backup snapshots of the application and database.

Responsibilities:

- Management: Managing and maintaining databases.
- Security and Access: Providing database security and access
- Issue Management: Resolve Issues
- Change Management: Fulfill Change Requests with the development of new capabilities
- Operational support: Support ongoing processes (e.g., contact management, emergency preparedness, payments, etc.), as needed.

3.2 Google Drive Administrator:

Google Drive: Google Drive is a cloud-based platform for storing, sharing, and collaborating on documents, spreadsheets, presentations, and other digital files.

WHCCA uses Google Drive to save and share files and documents with access control since 2024.

Responsibilities:

- Management: Overseeing Google Drive management.
- Security and Access: Provide Google Drive access
- Folder Structure: Responsible for setting up the folder structure, in alignment with security needs.

4. Succession Planning Process

4.1 Identification of Successors

- Identify potential successors for the DBA and Google Drive Administrator roles.
- Assess the skills, experience, and readiness of potential successors.
- Create a list of primary and secondary successors for each role.

4.2 Training and Development

- Provide targeted training and development opportunities for identified successors.
- Ensure successors are familiar with all relevant tools, systems, and processes.
- Conduct regular knowledge-sharing sessions and hands-on training.

4.3 Documentation and Knowledge Transfer

- Maintain comprehensive documentation of all procedures, configurations, and workflows.

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- Create a knowledge transfer plan that includes regular updates and reviews.
- Ensure successors have access to all relevant documentation and resources.

4.4 Testing and Validation

- Conduct periodic simulations and drills to test the readiness of successors.
- Validate the effectiveness of training and knowledge transfer through assessments.
- Identify and address any gaps in readiness or knowledge.

5. Transition Plan

5.1 Immediate Action Steps

- In the event of an unplanned departure, immediately notify the WHCCA President.
- The WHCCA President will activate the succession plan and contact the designated successors.
- Provide immediate access to all necessary systems and resources for the successors.

5.2 Short-Term Transition

- Designated successors will take over responsibilities on an interim basis.
- The WHCCA President will provide support and guidance during the transition period.
- Conduct regular check-ins to ensure smooth transition and address any challenges.

5.3 Long-Term Transition

- Assess the performance and readiness of successors during the interim period.
- Make necessary adjustments to training and development plans based on feedback.
- Confirm permanent appointments or continue with interim arrangements as needed.

6. Review and Update

- Review the succession plan annually to ensure it remains current and effective.
- Update the list of potential successors and training plans as necessary.
- Conduct regular reviews to ensure readiness and address any emerging challenges.

7. Version History

Version	Date	Author	Description
1.0	03/04/2025	Wayne Johnson	Baseline