

Guide to Succession Planning for Volunteer Fire and EMS Leadership

Volunteer fire and EMS departments need deliberate leadership development, shared knowledge and planned transitions before an election, retirement or unexpected departure creates a gap.

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IN SHORT

A practical succession-planning guide for developing operational, administrative and governance leaders in volunteer fire and EMS organizations.

Volunteer fire and EMS departments often know a leadership transition is coming but wait until the election, retirement or resignation to address it.

The department may have talented members without a clear development path. A longtime officer may hold critical knowledge without a backup. Administrative and corporate positions may receive even less attention than operational ranks.

Succession planning is not selecting the next chief years in advance. It is creating enough prepared people, shared knowledge and organizational stability that leadership can change without creating a crisis.

This guide covers operational officers, administrative leaders, corporate officers, board members and specialized roles within volunteer and combination organizations.

Define the Roles That Require Succession

Begin with every position whose vacancy would affect safety, governance, compliance, money or critical operations.

Examples include:

- Fire chief and operational command staff
- EMS leadership
- Company officers
- Training officer
- Safety officer
- President and corporate officers
- Board chair and directors
- Treasurer and finance roles
- Secretary and records responsibilities
- Recruitment and membership leadership
- LOSAP or benefits administrator
- Fleet and facilities leadership
- Technology and system administration
- Fundraising and event leadership

Do not focus only on titles. Some of the department's most critical roles may be informal or appointed.

For each role, document authority, responsibilities, qualifications, term, appointment or election process and immediate risk if vacant.

Separate Operational, Corporate and Administrative Succession

Volunteer departments may have several leadership structures operating at once.

Operational officers direct emergency response, readiness and training. Corporate officers and boards manage governance, finance and organizational obligations. Administrative leaders manage records, benefits, recruitment, facilities, technology and other essential functions.

One development path does not prepare someone for all three.

Clarify which competencies belong to each role. A strong incident commander may need additional preparation for budgeting, personnel issues or board governance. A capable president may not hold operational command authority.

Respect the boundaries while improving coordination among them.

Assess Current Succession Risk

Create a simple risk assessment for each critical role.

Ask:

- Q** Is a qualified successor available now?
- Q** Are one or more people in development?
- Q** Is the role documented?
- Q** Does a backup have access?
- Q** Are upcoming transitions known?
- Q** Would an election or appointment produce a capable candidate pool?
- Q** What would stop if the incumbent left today?

Classify roles as low, moderate or high risk. Prioritize high-risk positions controlled by one person or requiring lengthy qualification.

Review the assessment at least annually and whenever a leader announces a transition.

Define Competencies, Not Personalities

Succession planning should prepare people for the role rather than reproduce the current leader.

Define required competencies such as:

- Operational judgment
- Technical knowledge
- Communication
- Coaching and development
- Conflict management
- Policy and governance
- Budget and financial understanding
- Technology administration
- Project management
- Community and government relationships
- Ethics and confidentiality

Separate required qualifications from preferred experience. Identify what can be learned through training, mentoring and assignments.

Avoid writing the description around the strengths of the current incumbent. The next leader may succeed with a different style.

Identify Potential Broadly

Do not limit development to the most visible members or those who already resemble current leadership.

Look for reliability, judgment, curiosity, follow-through, ability to work with others and willingness to accept responsibility. Consider operational and non-operational contributors.

Ask members about their interests. Someone may be willing to lead training, finance or technology without wanting an operational command role.

Potential is not a promise of appointment or election. Be honest about that distinction while still investing in development.

Create more than one prepared person whenever possible. A healthy pipeline gives the organization choices and protects against changes in availability.

Create Individual Development Plans

For each interested person, identify the target role or competency, current strengths, gaps, development activities and review dates.

Activities may include:

- Formal courses
- Task books
- Mentoring
- Acting assignments
- Committee leadership
- Project ownership
- Budget participation
- Policy development
- Meeting facilitation
- Incident command experience
- Cross-department or association involvement

Development should include real responsibility, not only classes. A future treasurer needs experience with the budget and controls. A future training officer should plan, deliver and evaluate training.

Set achievable milestones and review progress at least twice a year.

Use Mentoring With Structure

Mentoring works best when the purpose is clear.

The mentor should explain decisions, introduce relationships, review work and allow the developing leader to act. The participant should bring questions, complete assignments and seek feedback.

Set regular conversations and specific goals. Avoid making the relationship dependent entirely on informal station time.

Use more than one mentor when helpful. Operational, governance and administrative perspectives may come from different people.

Mentors should develop independent judgment, not loyalty to a particular personality or faction.

Create Acting and Deputy Opportunities

People need safe opportunities to practice leadership before assuming the full role.

Use acting officer assignments, assistant positions, project leadership and defined deputies. Establish authority, supervision and limits so the assignment is meaningful without creating confusion.

Afterward, conduct a review:

- Q** What happened?
- Q** What decisions were made?
- Q** What worked?
- Q** What was difficult?
- Q** What knowledge or authority was missing?

Development requires honest feedback. Praise alone does not prepare someone for a larger responsibility.

Share Knowledge and Access

Leadership succession fails when the incoming person receives a title but not the information needed to perform it.

Document:

- Recurring responsibilities
- Annual deadlines
- Policies and decision history
- Accounts and permissions
- Vendors and contacts
- Budgets and contracts
- Open projects
- Reports
- Legal and governance obligations
- Current risks

Use department-owned systems and ensure backups can recover critical accounts. Do not wait until transition week to locate passwords and documents.

For a deeper continuity framework, use the [Guide to Preserving Institutional Knowledge in a Fire/EMS Department](#).

Plan Elections and Appointments Responsibly

Election rules may limit how directly the department can designate a successor. Succession planning still matters.

The organization can define qualifications, communicate role expectations, develop several people and provide members with meaningful information about

candidates.

Avoid changing qualifications immediately before an election to favor or block a particular person. Review bylaws, policy and applicable law well before the transition.

Appointment processes should also be transparent enough to maintain trust. Document who decides, what criteria apply and how conflicts are handled.

Prepare the Transition

Once a successor is selected, use a formal transition plan.

Include:

- Effective date
- Authority transfer
- Responsibilities and open decisions
- Account and access changes
- Required notifications
- Vendor and government introductions
- Records and physical property
- Upcoming deadlines
- Communication to members
- Support available from the outgoing leader

Set boundaries for the outgoing leader. Continued advice can help, but the successor needs room to lead. Avoid creating a shadow authority that undermines decisions.

Handle an Unexpected Vacancy

Policy should define interim authority before a vacancy occurs.

Identify who assumes immediate responsibility, which decisions they may make, how long the interim period lasts and how permanent selection occurs.

Maintain current emergency contact and access information. Leadership should be able to secure accounts, notify vendors, protect records and continue critical work without relying on cooperation from the departing person.

An unexpected vacancy is easier to manage when documentation, backups and development already exist.

Include Governance and Financial Continuity

Operational succession often receives the most attention because the risk is visible. Corporate and financial gaps can be equally damaging.

Cross-train authorized people on banking controls, financial reports, insurance, tax filings, contracts, charitable registration, meeting records and required approvals.

Preserve separation of duties. Cross-training does not mean giving one person unrestricted control over transactions and review.

Board members should understand fiduciary responsibilities, conflicts, confidentiality and the relationship between governance and operations.

Develop Leadership Culture, Not Just Candidates

Succession planning fails in organizations where current leaders treat knowledge as power or potential successors as threats.

Reward teaching, delegation and development. Make after-action review and constructive feedback normal. Allow newer leaders to improve processes rather than requiring them to preserve every tradition unchanged.

Members should see leadership as service and responsibility, not simply recognition or rank.

Address behavior that drives capable people away from leadership opportunities. A strong curriculum cannot overcome a culture that punishes questions and initiative.

Measure Succession Readiness

Useful measures include:

- Critical roles with a named backup
- Roles with at least one developing candidate
- Completion of development plans
- Acting assignments completed
- Documentation reviewed
- Accounts with multiple authorized administrators
- Upcoming transitions with written plans
- Vacancies and time to fill
- Retention of developing leaders

Do not reduce readiness to a single score. Use measures to expose gaps and guide action.

Review succession risk annually with appropriate operational and governance leadership.

CHECKLIST

Succession Planning

Confirm that the department has:

- ☐ Identified critical operational, corporate and administrative roles
- ☐ Defined authority, responsibilities and qualifications

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| ☐ Assessed succession risk | ☐ Identified potential leaders broadly |
| ☐ Created development plans | ☐ Assigned structured mentors |
| ☐ Provided real acting and project opportunities | ☐ Documented responsibilities and decisions |
| ☐ Shared critical access appropriately | ☐ Established election and appointment processes |
| ☐ Created transition checklists | ☐ Defined interim authority |
| ☐ Protected financial and governance continuity | ☐ Scheduled annual readiness reviews |

Frequently asked questions

When should a volunteer department begin succession planning?

Before a known transition. Leadership development and shared knowledge should be ongoing responsibilities rather than a project that begins after someone announces retirement.

Does succession planning mean choosing the next chief in advance?

No. It means preparing several capable people, documenting the role and creating a reliable transition process. Elections or appointments should still follow governing rules.

Which roles need succession plans?

Include operational officers, corporate and board leadership, finance, records, training, recruitment, technology, fleet, benefits and any role whose

vacancy would create significant risk.

How can a small volunteer department develop multiple candidates?

Use assistants, committees, project ownership, acting assignments, cross-training and regional education. Development can be scaled without creating unnecessary titles.

What if the current leader does not want to share responsibility?

Leadership and governance should establish backup access, documentation and development as organizational requirements. Critical continuity cannot depend on one person's preference.

Should the outgoing leader remain involved?

Structured advice can help, but the successor needs clear authority. Define the outgoing leader's role, duration and boundaries.

How often should succession readiness be reviewed?

Review critical roles at least annually and whenever qualifications, availability, terms or leadership intentions change.

For the personal leadership perspective, read [Leadership in a Volunteer Firehouse Is Different.](#)



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