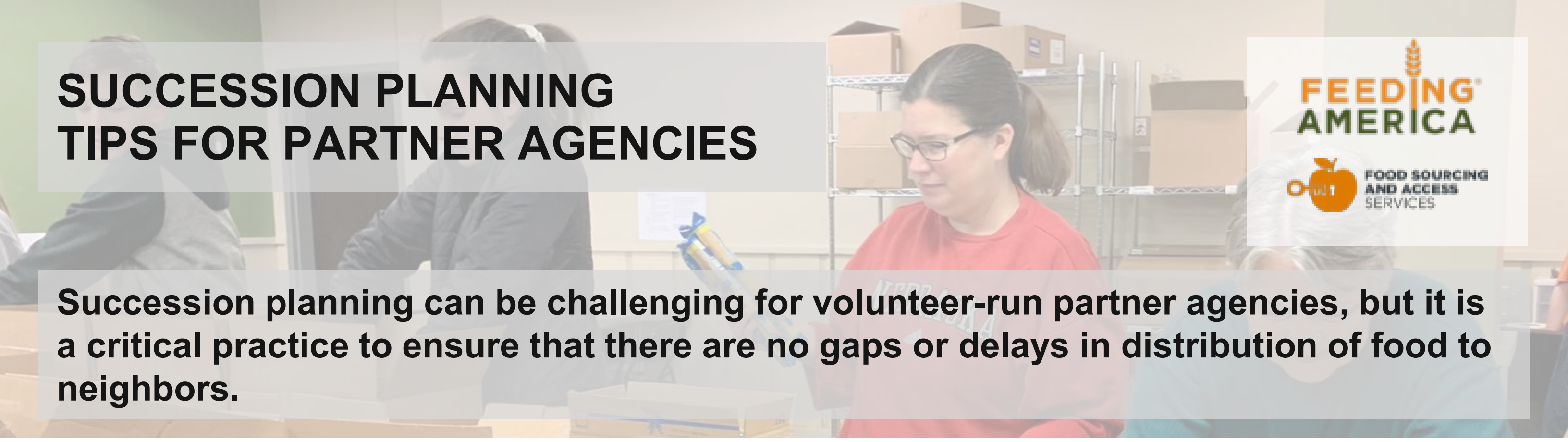

SUCCESSION PLANNING TIPS FOR PARTNER AGENCIES

Succession planning can be challenging for volunteer-run partner agencies, but it is a critical practice to ensure that there are no gaps or delays in distribution of food to neighbors.

This brief guide shares learnings from food banks to assist partner agencies in implementing succession planning best practices.

This resource is for partner agencies.

WHAT IS SUCCESSION PLANNING?

- Succession planning is a process to prepare your agency for a smooth transition in planned or unplanned/emergency leadership changes, whether long-term or temporary.

WHY IS SUCCESSION PLANNING IMPORTANT?

- **Best serve clients:** If only one person is equipped to run your agency - with the knowledge or physical components (i.e. keys) to do the job - clients will be negatively impacted if/when that person is unavailable for any reason and food cannot be distributed.

- **Communication with the food bank:** The food bank may need to communicate time-sensitive messages to you, for example if a truck is delayed or delivery items have changed. This chain of communication is more effective when multiple people have a relationship and modes of contact with food bank staff.

- **Long-term viability:** Bringing more people into your agency and its processes only serves to grow capacity and create natural leaders to sustain the agency's mission into the future. A shared allocation of tasks can also ease the administrative burden that is often carried by one person.

- **Sound nonprofit business practice:** When readiness is a core organizational system, rather than an ad hoc process, the agency is better prepared to meet the legal requirements of its nonprofit charter/articles of incorporation.

SUCCESSION PLANNING TIPS FOR PARTNER AGENCIES

INITIAL CHECKLIST

❑ Identify at least one back up

Neighbors rely on your agency for food, so there should be at least one additional person who is capable of ensuring that your agency is still able to operate if the lead volunteer/staff person is indisposed. For many agencies, it is helpful to default to the board chair or chair-elect to serve in that role; for others it may be a co-founder or other long-term volunteer. The benefit to having a board member in this role is that as positions rotate each term, more than one director will become familiar with operating procedures, which both ensures sustainability and also that the board is aware of the current succession plan.

❑ Confirm accessibility in case of emergency

No one can be totally prepared for an accident or a natural disaster. In an emergency, though, more than one person should have the tools they need to access the agency, including keys to the building and any other locked function (i.e. mail), as well as codes or passwords to necessary protected accounts. The agency should also have more than one trusted person who can access organizational banking systems (multiple approvals may be appropriate for withdrawal).

❑ Communicate with your food bank partner

The agency relations professional at the food bank can support succession planning efforts by including the secondary contact(s) in trainings or meetings and on key emails.

SUCCESSION PLANNING PRACTICES

- **Create a list of key operational processes:** Draft a simple list of operational practices that are important to the mission and how often they are completed. Don’t forget to include tasks that occur less frequently, such as tax filings or quarterly reports to the food bank. List the level of coverage (lead and back-up) for each key area, and then prioritize the practices by those that are critical to access to food; the ability to order food and open the pantry or kitchen are two examples. This will help identify any holes, or areas of limited coverage, to begin to address.

- **Document systems:** Once a list is made and prioritized, you can begin to note important processes in a central location so that others have a reference to consult when needed. This can be a daunting task, but don’t feel pressured to do everything at once; steady progress is good progress.

- **Encourage others to be involved:** Although consolidating tasks may be easier, it is healthier for the agency to have multiple people with institutional knowledge to carry out the mission. Bring a core group into the fold on prioritized list items to share work, become familiar with processes, and further the legacy of founding members.

- **Clarify roles:** There may be cases in which a secondary contact is identified and asked to serve strictly in emergencies. There may be others in which the “back up” can take more of a lead role as preparations for long-term transition are made. Be certain these roles are clear when asking people to serve in these functions to avoid confusion later.

SUCCESSION PLANNING TIPS FOR PARTNER AGENCIES

CONTINUITY AND EVALUATION

- **Evaluate and confirm annually:** Consult the list of priority operational tasks, secondary contacts, and progress toward documenting systems on an annual basis. Make sure all information is still accurate and current, and identify any succession planning goals for the coming year. This may be helpful to do in conjunction with the beginning of the calendar year or fiscal year.

- **Cross-check for atypical change:** The agency may have added or decreased services in the prior year, or additional compliance measures and processes may have been implemented. Double check that new functions have the same level of coverage as long-standing tasks.

- **Communicate any updates:** Share any changes with your board and food bank partner, especially if a change impacts information included in agency contracts.

Tip: It may be helpful to attempt to answer a few questions as a temperature check each time you evaluate your current succession plan:

1. What would happen if I/the person in our lead role was absent for three months? How would that impact our ability to distribute food?
2. Who else could serve in the lead role if necessary? If only one person or none can be called upon, more work must be done to increase coverage.

EMERGENCY MEASURES

While the focus of this resource is on taking proactive steps to set succession plans in motion, it isn't always the case that these plans are fully developed when an urgent need for them arises. In this situation, there are a few emergency measures to take:

- Notify other lead volunteers, board, and your food bank partner to activate an "all hands on deck" approach to coverage. Or simply coordinate with one other person to share with these entities. You may have a phone tree or email listserv already in place for communicating across these groups.

- Arrange pick up of any necessary keys, and share important codes, passwords, or contact information.

- Focus on short-term priorities first: ensuring food is available and opening the pantry for the next client distribution.