FEEDING SAN DIEGO

Succession Planning for Agency Partners

2023

Succession Planning

*Send a copy of this page only to your Partnerships Coordinator and when you make any edits to his page. When succession plan is **in use**, please notify your Partnership Coordinator immediately.*

Date Completed: ________________________________

Agency: ____

Agency Number: ____

Main (Current) Contact: ____

Title: ____

Phone: ______________________   Email: _______________________________________

☐ Agency Training Certified   ☐ ServSafe Certified

Secondary (Successor) Contact: ____

Title: ____

Phone: ______________________   Email: _______________________________________

☐ Agency Training Certified   ☐ ServSafe Certified

Agency Express (Person in charge of ordering): ______________________________________

Phone: ______________________   Email: _______________________________________

MealConnect (Person in charge of Receipts): ____

Phone: ______________________   Email: _______________________________________

List three people that could run the agency in the absence of the Primary and Secondary contact:

1. _____________________________________
2. _____________________________________
3. _____________________________________

Agency Training

It is required that **at least the primary and secondary contact watch the FSD Partnerships Basics Training video once a year and/or when there is turnover on one of those key positions**. You can find it in our Partner Resources section of our website here https://feedingsandiego.org/partner-with-us/agency-partners/trainings/. It is also **required to read the Agency Handbook**.

If you are participating in Food Rescue then it is **required that the Primary contact and the MealConnect person watch the Food Rescue Training video and complete a quiz once a year and/or when there is turnover in one of those key positions**. You can find our food rescue video at https://youtu.be/-TJUePh8MWY. Please speak to your Partnership Coordinator for the quiz. It is also **required to read the Food Rescue Handbook.**

Passwords

MealConnect	
Agency	
Username	
Password	

Records to Keep

Contact your Partnerships Coordinator if you need copies of or help with any of the following.

All Agencies
- ✓ Daily Temperature Logs if you have cold storage
- ✓ Transport Temperature Logs if you do food rescue pickups
- ✓ MealConnect receipts every 7 days from pickup if you do food rescue pickups
- ✓ Daily Pest Control Self-Logs if you do not have commercial invoices
- ✓ Current Food Handlers Card or certification for at least one person in attendance at every distribution for the entire length (recommended at least 2 people)

Introduction to Succession Planning

Succession planning is the process of identifying potential leaders and training them to fill key positions in the future.

Succession planning ensures that a member agency can continue serving its community even if the key leader(s) is absent for a short period of time or leaves the position.

It does this by:

- Identifying critical leadership roles within the member agency
- Identifying and assessing possible people who could fill those roles
- Establishing the skills and characteristics required to take on those roles
- Providing potential leaders with appropriate training activities to prepare them to fill those key positions

Of course, we understand that sometimes little warning is given for a leadership change and there are limited resources of volunteers and potential leaders. This is meant to be a guide to start thinking about succession planning and to implement what is possible for your individual organization.

Benefits of Succession Planning	**Risks of Not Engaging in Succession Planning**
• Ensures long-term survival of the member agency	• Inability to keep member agency doors open
• Prepares current people to take on key leadership roles	• Inability to serve hungry community members in need
• Improves commitment to the member agency's mission and activities	• Unprepared/unqualified leaders
• Gives current leaders more administrative support	• Uncertainty for staff and potential for low morale

Identifying Potential Leaders

THE PROCESS

1. The Ask

2. The Meeting

3. The Initiation

4. The Check-In

5. The Learning Curve

The Ask

The Ask is the first step in identifying potential leaders, and can be done in two ways:

The Internal Ask

How would you ask people within the member agency if they would be interested in joining the Leadership Team? Ex: One-on-one, flyers, announcements, emails, etc

Answer:

The External Ask

What are some organizations or people outside of the member agency that could help you recruit potential leaders? Ex. Churches, personal contacts, organizational networks, etc.

Answer:

The Meeting

Once you know who is interested in becoming a potential leader, set up an informal interest meeting – either individually or in a group setting.

Meeting structure will vary, but encourage potential leaders to write down their answers to the following questions during the meeting and/or discuss them as a group.

1) Why would you like to be a part of this organization?

2) Why are you interested in becoming a leader?

3) What kind of time commitment can you give to this leadership position?

IMPORTANT!

During this meeting, it is vital to discuss the expectations you have of leader(s) within the member agency!

The Initiation

This is a trial period where potential leaders work alongside volunteers at the member agency to get a feel for the agency, its processes and see if this is something they want to pursue.

Initiation Checklist

In the box below, list some of the key activities that could help potential leaders better understand how your member agency operates. We have started you off with a few examples!

- Packing food boxes for distribution
- Client Check-In
- Unpacking Delivery Truck

The Check-In

After the Initiation period, sit down with the potential leader to discuss the following:

- Their level of understanding of the member agency
- If they've experienced any particular challenges
- If they've enjoyed any particular aspects so far
- If they are still interested in becoming a leader

If they want to proceed, we suggest the following:

Next Steps	Completed?
Discuss specific leadership role(s) they want to have at the agency	
Discuss the specific expectations and next steps associated with that role(s)	
Give them the resources needed such as a copy of the FSD Agency Handbook, training videos and any other important agency documents	
Have them review the handbook and documents then set up a time to discuss any questions within the agency and also with the FSD Partnership Coordinator	
Any training that needs to occur such as shadowing current members etc (recommended 1-3 months)	

The Learning Curve

One of the most important aspects of succession planning is preparing incoming leaders to take on their leadership role in the future. Below are a few examples of how to best train incoming leaders:

Modeling

Also known as job shadowing, this is when the incoming leader begins learning the ins and outs of their specific role by observing how the agency leader performs tasks and duties.

Coaching

Also referred to as mentoring, this is when the incoming leader begins practicing and performing the tasks of their new role under the helpful and constructive guidance of the agency leader.

Articulation

This is when the incoming leader discusses their understanding of the tasks and abilities they have been learning through interactive one-on-one conversations, group discussions, or writing exercises.

Reflection

This phase encourages the incoming leader to individually reflect on their learning experience, where they are, and where they want to be. This can be done in a variety of ways including journaling.

Job Sharing

Two or more people share a leadership role so that they can easily take over for each other if one is absent or leaves the member agency.

Why a Leadership Team?

The first part of this toolkit focused on identifying potential leaders. This next part will cover how to identify key leadership roles within the member agency and how current leaders can work together to create a succession plan and effectively run the member agency

Why?

Why should leaders work together as part of an established Leadership Team?

- Helps spread out the workload so it isn’t all on one person
- Helps the agency run more smoothly
- Builds strong relationships among key leaders/volunteers, etc.
- Serves as a talent pool
- Improves communication

How?

How can the agency create or improve its Leadership Team?

- Make sure all leaders understand their specific role(s) along with the roles and responsibilities of all other Leadership Team members

- Discuss how different members of the Team will train future potential leaders
- Establish when the Team will meet, how often, and how they want to communicate with each other
- Use the worksheets and discussion topics in this toolkit as a teambuilding exercise
- Create and update the agency's succession plan

Leadership Team Worksheet

Work with the Leadership Team to establish the "who, what, when, where, and how" the member agency operates

Leadership Team Role	**Main Tasks**	**Necessary Skills**	**Time Commitment**	**How Chosen?**	
Example: Primary Agency Leader	• Complete the MealConnect receipts for all food rescue pickups • Oversee the food distributions	• Comfortable with computers & Excel • Previous volunteer experience with a food pantry • Passionate about the work & community	10 hours/week to run the pantry…	• Previous volunteer with the agency • Has the time and interest	

Training Worksheet

Use this worksheet along with the training practices on p. 10 to establish who, what, when, where, and how incoming leaders will be trained.

ROLE	How will they be trained?	Training Timing	Who will train them?
Example: Primary Agency Leader	• Observe all existing Leadership Team members performing their duties • Incoming leader begins practicing agency leader's tasks • Incoming leader is involved in agency decision-making • Incoming and current leader work together as equals to perform operational tasks for a particular period of time…	1 month…	Jane Doe…

“The Art of Communication is the Language of Leadership”

When creating a succession plan, it is important to involve all Leadership Team members in the process. Because completing the steps in this toolkit may take multiple meetings, it is important to establish when and where succession planning meetings will take place – in particular, the first meeting:

First Succession Planning Meeting:

When will it take place?	
Where will it be?	
Who will be there?	
How will they be invited to the meeting?	

Communication among Team members is important because:

• It incorporates different perspectives into the succession planning process. This ensures Team members take ownership of the process and are invested in the plan’s success.

• Discussing the necessary skills and attributes of leadership roles will help Team members spot talent within the member agency.

• Increased communication and camaraderie among team members will keep them engaged and satisfied to stay with the member agency.

IMPORTANT! We suggest continuing these meetings after the succession plan is created to continue open communication among Team members, create a sense of community, discuss challenges and successes, and remain aware about each other’s roles in the event that one of the leaders is unexpectedly absent.

Communication Worksheet

We understand that it’s not always possible for every Team member to make every meeting. It is important to have a procedure in place to keep Team members in the loop even if they miss a meeting.

This could involve one Team member taking notes during the meeting while another member types and emails the notes to those who were absent. It could involve calling absent Team members to update them

Absence Procedure:

Brainstorm what this process could look like below and use the following questions to guide the conversation:

How will Team members be updated if they miss a Team meeting?	
Who will update them?	
What forms will that take (ex. Email, text, phone call, in-person)?	
Will there be a written record of what is discussed at each meeting so Team members can refer back to it?	
If so, where will the written record be kept and who will have access to it?	

Documentation

Keeping a written record of the member agency's operations, procedures, and succession plan is a good way of securing the collective knowledge within a member agency.

This makes it easier for future leaders to transition into their new role(s) and ensure the agency continues serving hungry people in the community. It is recommended that your agency have at least 2 physical copies of important documents that are kept in 2 separate places on-site.

DISCUSSION TOPIC

Think of the essential procedures or practices in your member agency. Discuss with your Leadership Team how you document and organize these items. Use the following questions to guide your discussion and write the answers in the notes section of this toolkit:

- How is food ordered? Where are these instructions?
- How are reports completed? Where are these instructions kept?
- Who are the main points of contact within the member agency?

- What is the process to check-in clients?
- What are the daily procedures at the agency?
- Who conducts new volunteer training?
- Where will these documents be located and who will have access to them?

Notes

This Succession Planning Toolkit was repurposed from the Arkansas Foodbank and The Foodbank Of Central Alabama

Reference: Arkansas Foodbank Succession Planning Toolkit for Member Agencies and Member Agency Summary Succession Plan

Community Foodbank of Central Alabama Succession Plan