AGENCY SUCCESSION PLANNING TIPS FOR FOOD BANKS

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

This brief guide shares learnings and samples from network members to assist partner agencies in implementing measures to aid in succession planning.

This resource is for Agency Relations professionals. Find the companion resource with tips to share with partner agencies here.

WHAT IS SUCCESSION PLANNING FOR AGENCIES?

Succession planning is a process to prepare agencies for a smooth transition in planned or unplanned/emergency leadership changes, whether long-term or temporary. This practice of strategic readiness is especially important for volunteer-founded/-led agencies, although supporting succession planning at some level with staffed agency partners can be helpful.

WHY IS SUCCESSION PLANNING IMPORTANT?

- **Best serve clients:** If only one person is equipped to run the 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:** You may need to communicate time-sensitive messages to agencies, 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 contact with food bank staff.

- **Long-term viability:** Bringing more people into an agency and its processes only serves to grow capacity and create natural leaders to sustain the agency's mission into the future if/when a permanent change is necessary. A shared allocation of tasks can also ease the administrative burden that is often carried by one person. A resource from the Arkansas Food Bank on the formal process of growing an agency leadership team may be found here.

- **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.

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WHEN SHOULD WE DISCUSS SUCCESSION PLANNING WITH PARTNERS?

The best time to approach succession planning with agencies is during recruitment, before the partner agency contract is signed *(see below)*. This topic should also be revisited in annual review meetings/audits, which may be a good option to open the conversation if succession plans were not identified as part of recruitment.

If the volunteer is sensitive to discussing contingency plans, it can be helpful to approach this topic as a new standing discussion item most closely tied to logistics or compliance, unconnected to personal reliability, health concerns, or long-term leadership transition.

HOW DO WE HELP OUR AGENCIES IMPLEMENT SUCCESSION PLANS?

- **Include plan summary in recruitment/agency agreements:** Partner contracts should include the plan details below.
  - Lead - the primary contact for the organization.
  - Back-up - who to contact when the lead is not available. This person should be willing to attend food bank meetings and trainings related to the contract and understand the functional aspects of the agency with coaching from the primary lead. For agencies with limited volunteer coverage, the default option for the back-up contact may be the board chair/chair-elect. This also encourages board involvement, and an annual board review of the succession plan.
  - Multiple contact channels: home/cell/business phone numbers, email, and home address for both contacts.

- **Require two people:** When the lead and back-up person are identified, both should be invited to agency orientation meetings. Key communication from the food bank should also be distributed to both as a matter of course, including information on food bank convenings, and both invited to meet with agency relations professionals at site visits and annual review meetings/audits.

- **Ask about process manuals/physical redundancy:** Audits are good opportunities to visit about more in-depth succession planning practices:
  - Encourage the agency to list regular processes - both between the food bank and agency (managing inventory, reporting, etc.), as well as those internal to the agency. This could include anything from open/close practices to client intake or receipt of donations. Supporting creation of this list helps set clear expectations and clarify roles for the requirements from the food bank, as well as prompts discussion and planning for these internal items.
  - Ask to see documentation for operational tenets - once a list is created, and/or whenever a question about systems comes up in conversation, ask if these processes are documented in any way, and who would have access to that documentation. Even handwritten notes in a binder are preferable to all institutional knowledge residing inside one person's head.
  - Check for physical redundancy - inquire about key locations/owners as well as any other physical barriers to access, to make sure more than one person has the ability to operate the agency.

- **Model best practices:** Succession planning is not just for agencies; it is a best practice for network members as well, and a way to model the importance of readiness. In this way, you can share the systems and methods that work for you with your agencies. For those in management roles, succession planning is also integral to talent development from within the food bank.