STAYIN' ALIVE: SUCCESSION PLANNING
SECURING YOUR MISSION FOR THE FUTURE

Introduction and Background

Self, Participants, Topic

WHY Succession Planning? _____

Heraclitus: "Nothing endures but change."

Are we prepared?

Starting the conversation here, continuing it at home

Vacancies occur in two ways: Emergencies; Planned retirements. Easier to approach succession planning thinking of the emergency situation - less personal, easier envisioned, more demanding of a solution. Then expand to apply to any vacancy.

WHOSE Responsibility? _____

Collaboration. Everyone has something to contribute.

Legacy of true leadership not what we did in the past but what we left for the future. Our goal a pantry that can adapt, change, prosper and thrive in the future without us.

FOUNDATIONAL REQUIREMENT: Statement of Vision and Values:

- Who are we? _____

- What do we do? _____

- Whom do we do it for? _____

- Where do we do it? _____

- What are our Values? _____

- What do we see as our future? _____

- What are our Strengths, Weaknesses, Opportunities, Threats. _____

ELEMENTS OF SUCCESSION PLANNING

A. Job Description

WHAT do you do? List everything

WHAT is the **most unexpected thing you do** – that maybe others don't see or know?

NOTE: **A collateral benefit** of this process is that it may reveal that one person does too much. **Job accretion**. One does this task and it leads to another, and another and another. Little wonder we sometimes find ourselves overwhelmed.

Is it time to shed, to share some tasks with others? - this small step of reallocating duties while making an immediate difference is also a big step towards future operations.

RESULT: An understanding of what everyone in the organization does. What skill sets are necessary . And what to look for in a successor.

WHEN do you do it?

Prepare a calendar - month by month.

Document processes and procedures

B. WHERE is everything?

The keys; the order forms; telephone numbers.

How do things work? - manuals, instructions,

Record Keeping, computers, etc.?

Centralize and standardize files/ information

C. CRITICAL RELATIONSHIPS

WHO are the key inside people?

WHO are the key outside people?

WHICH are the key outside agencies?

Nature of Agency relationships

Donors

Volunteers

Community Partners

Are these relationships based on the person or the mission? If the person, what happens when she/he is no longer there?

Avoid this by "sharing" the relationship - introduce others

D. **CRITICAL Resources**

Funding sources

Donor agencies

Sources for Volunteers

E. REDUNCANCY

Very important. Secures short term stability.

Policy point: Every key person to assure that at least 1, ideally 2, other people are knowledgeable about the critical duties they perform – and can see that those duties continue to get done.

Cross-training. Build the bench -- like a baseball or sports team.

F. MONITORING

Review the system annually

- all parts in place
- all parts working
- all information up-to-date
- ongoing feedback established (what works or doesn't or could be improved?)