



# Succession Planning






**Succession planning** is a process of identifying and developing internal people with the potential to fill key leadership positions in the agency. Succession planning increases the availability of experienced and capable staff that are prepared to assume these roles as they become available. Taken narrowly, "replacement planning" for key roles is the heart of succession planning.

- Wikipedia



Research indicates that clear objectives are critical to establishing effective succession planning. These objectives tend to be core to many or most agencies that have well-established practices:

- Identify those with the potential to assume greater responsibility in the organization
- Provide critical development experiences to those that can move into key roles
- Engage the leadership in supporting the development of high-potential leaders
- Build a database that can be used to make better staffing decisions for key jobs (These can be simple lists!)



In other agencies these additional objectives may be embedded in the succession process:

- Improve staff commitment and retention
- Meet the career development expectations of existing staff/volunteers
- Counter the increasing difficulty (and costs) of recruiting staff/volunteers externally

# Volunteers who are under-utilized may feel unneeded.

## Bored Volunteers



## Volunteers Who Quit



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# Why are some volunteers bored when others are so busy?

## Some reasons are:

- No clear job descriptions
- Bad communication on what is expected
- Failure to let go of some responsibilities so they will be “done right”
- Not having a simple chain of command to follow

## Volunteers may think:

- I didn't know it was my job.
- I'm afraid to do anything on my own because I'll screw it up – they are pretty particular.
- The boss is out, so I didn't know who to ask. I'll just wait until she comes back.



# Start with Making Job Descriptions

## One Example:

**Treasurer** – person responsible for receiving all invoices and paying bills as needed. This person will advise those placing orders how much money they have to spend on a monthly basis. The treasurer makes sure the program is operating in the black, and if not, must call the group to action to fix this. This person will be responsible for supplying financial information for grants, fund-raising events, auditors (if applicable), the board and other interested parties in addition to the pre-approved program members. This person is responsible for efficiently organizing the financial paperwork and keeping it safely on file for 3 years. During this time, only the pre-determined, appropriate people should have access to the files and they should not be stored at home.



# Who Decides Job Descriptions?

- Oftentimes it is based on duty preferences or strengths of the person willing to take the job. Although this should be a major consideration, job descriptions should be based on the programs needs.
- These can be determined by a meeting of your group leaders (or potential leaders) or you can utilize your agency's board.





# Starting a Board of Directors

- This sounds intimidating for some when in fact it can be quite a relief to not decide everything on your own.
- See sample job description list provided or come up with your own.
- Invite interested parties to an information meeting – you may find participants have suggestions on others to invite into the group.
- Decide on what type of people to include based on how they may help your organization (i.e. different professions may lend assistance in various ways).



## Don't Expect Perfection

- Whether it is the volunteer job descriptions or the boards, chances are they will need to be tweaked over time.
- This is a good reason to have terms of office for a board leader – you can get fresh faces if wanted or politely move past a less ambitious board leader after his/her term is over.
- Remember, this is a tool for your agency and needs to grow to meet your changing needs.



# You Can Start Small

- There are no rules that you can't form a simple committee to start up before, or in lieu of, having a formal board.
- The trick is creating clear, easy-to-identify roles for the various players.
- Come up with some objectives and work towards them.
- Above all, make it work for your agency. This should be a partnership with your agency's mission and goals being met.

# Designing an Organizational Chart





# Putting the Order on Paper

- By drawing out a simple chart, you can answer a lot of questions on who is in charge and how they all fit together.
- You may have volunteered together for years, and sometimes after doing it for so long it seems like things just somehow get done. Laying out the hierarchy helps define who does what and who oversees different functions.
- A picture may say a thousand words and can eliminate a lot of explanation.

**See how you  
can visualize  
how people's  
rolls fit  
together.**

This doesn't  
mean you can't  
or shouldn't  
cross-train for  
different  
positions.



# Planning for Short Term Emergencies





## Start by Coming Up with a List of Potential Short Term Emergencies or Changes of Command

- Snow storm
- Power outage
- Water line break
- Delivery truck broke
- Church needs hall for funeral
- Forgot to place a food order
- Volunteer wants a vacation
- Volunteer gets sick
- Need to leave others in charge to go to a meeting
- Child got sick and must leave
- Snow birds – seasonal volunteers





## Next, Come Up With a Plan of Action

- Make sure plowing is covered
- Possibly have a back-up generator
- Have maintenance crew's contact numbers along with established companies they do business with
- Alternative room for distribution
- Have a small stockpile of food to last past next delivery, also contact Food Bank
- Have appropriate back-ups ready – see organizational chart as a reference
- Have a list of days and times volunteers can possibly be available

If your answer was to close for the day...  
your program needs to work on this.



# Planning for Long Term Emergencies or Changes of Command

- This often happens when key staff have health difficulties or they no longer wish to continue for various reasons.
- Don't assume your short term solution of back-up people will work. Not everyone is interested in the same level of commitment. Be respectful of that or they will likely quit too.
- Bring in your board of directors to work out a solution. They are the ones in charge of coming up with an interim and long term solution at this point. Ideally, they already have a plan just-in-case.



# Don't Play “Not My Problem”

- It will be a team effort to look for a solution, your input matters.
- The board should be looking to the volunteers to give them good advice. This is a good time for constructive information from all volunteers.
- Remember your mission and work to carry it out as smoothly as possible without fighting amongst each other.
- Inform the Food Bank of major changes – we may be able to help in some cases.



# Don't Forget to Train

- Train back-up people ahead of time and occasionally let them carry out those roles to make sure they are comfortable with them.
- The Food Bank offers a monthly orientation – call and register anyone interested.
- Knowledge leads to confidence. The more they know, the less intimidating it will feel.
- Leave the new person an outline of trainings or annual meetings that will help them. I'm sure they would want to know there is a training class on the grants they will be filling out.

# Creating a Resource Guide





# Some Things to Include

- Your organizational chart
- Volunteer names, contact information and days they are available
- Board Members and contact information
- List of key people such as the pastor of the church your program resides in and maintenance staff
- List of who has keys
- Maintenance services and contacts (even if you aren't in charge of them such as snow removal, plumbing, refrigerator repairman, etc.)
- Food Bank of WNY's information
- Other food suppliers
- Short & long term back-up plans
- How to operate equipment



# Do a Trial Run

- Go through your list as if something suddenly came up.
- Could you follow it or do you need further directions?
- While you are at it, check out your emergency exits.
- Revisit this plan, perhaps annually, just as you do fire drills.





# Everyone Does Things Differently

- There is more than 1 correct way to run a program.
- Learn to let go of the smaller details and feel confident that the people you are selecting will be just as invested in making your program work as you are, even if they go about it in ways you wouldn't.
- Fresh ideas can enhance the “old tried & true”. If you let others participate in decision making you will find they feel much more appreciated & committed to the program....and you don't have to do everything yourself!

# Final Note

Succession Planning doesn't mean anyone is being kicked out from something they love. It is simply a plan to ensure all the hard work done will continue on well into the future. It will also ease the burden and allow volunteers more freedom and enjoy the time they put in.

