

# ARKANSAS FOODBANK

Succession Planning Toolkit for Member Agencies



**Arkansas Foodbank**

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# 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 or long period of time. 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

## ASK YOURSELF...

“If the leader at your member agency were suddenly absent for 6 months, what would happen?”



### Benefits of Succession Planning

- Ensures long-term survival of the member agency
- Prepares current people to take on key leadership roles
- Improves commitment to the member agency's mission and activities
- Gives current leaders more administrative support

### Risks of Not Engaging in Succession Planning

- Inability to keep member agency doors open
- Inability to serve hungry community members in need
- Unprepared/unqualified leaders
- Uncertainty for staff and potential for low morale

# Let's Begin!

Member Agency Name:

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What is the purpose of your member agency?

Write the primary agency leader's name along with three people who could run the member agency in their absence

Primary Agency Leader: \_\_\_\_\_

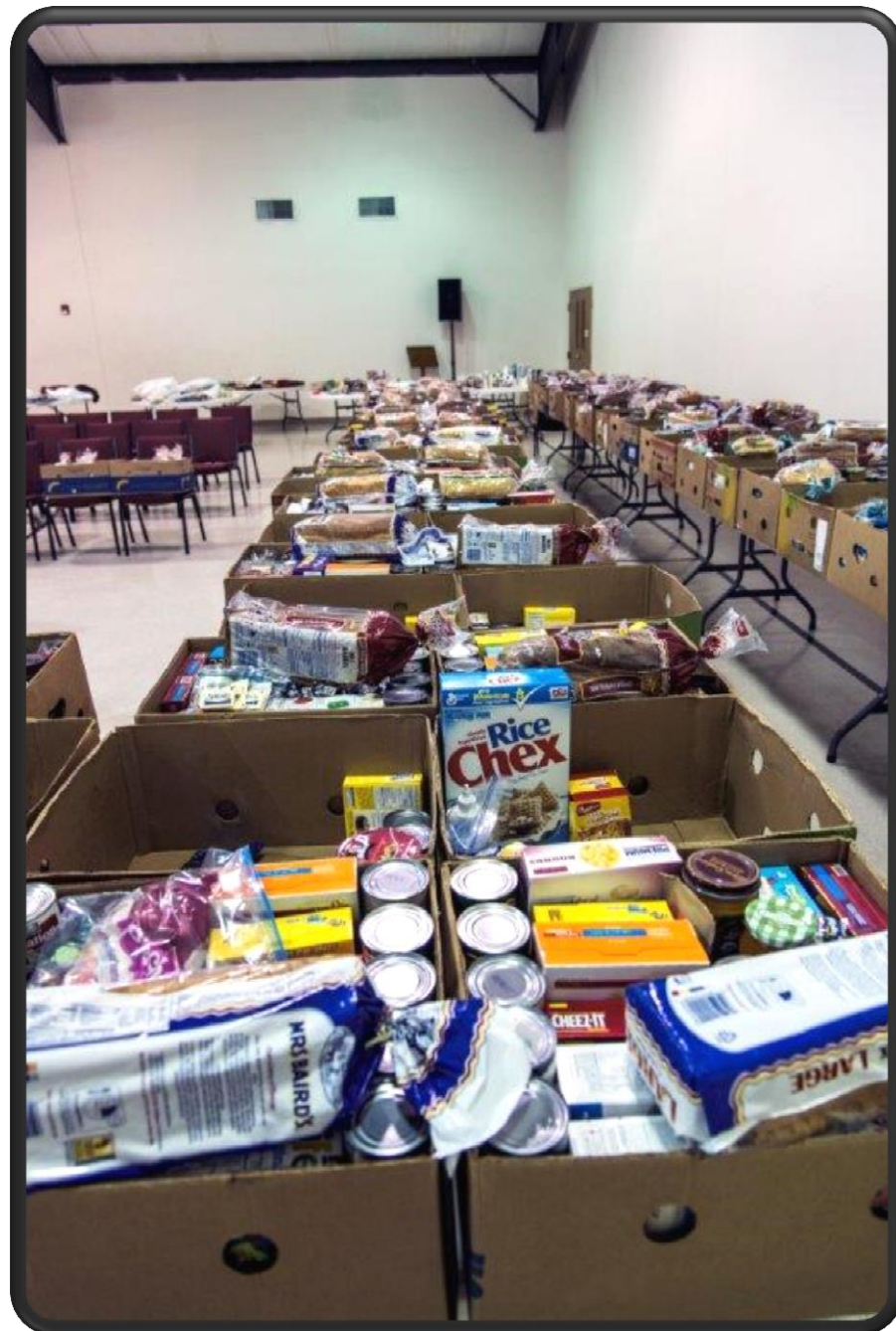
1) Name: \_\_\_\_\_

2) Name: \_\_\_\_\_

3) Name: \_\_\_\_\_

**Now, let's look at ways to identify potential leaders  
in the future**

# 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.*

## 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.*



# 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 member agency?

2) Why are you interested in becoming a leader?

## 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	Done?
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 a copy of the Arkansas Foodbank Member Agency Handbook (on p. 19) & any other important agency documents	
Have them review the Handbook & documents	
Training (1-5 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.

## Courses

This refers to formal courses led by knowledgeable members of the member agency or Arkansas Foodbank. Topics can range from general management to leadership development to volunteer management.



# THE LEADERSHIP TEAM



# 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	Necessary Personality Characteristics	Time Commitment	How Chosen?
<i>Example: Primary Agency Leader</i>	<ul style="list-style-type: none"> <li>• Complete monthly reports for Arkansas Foodbank</li> <li>• Order food 1x/week...</li> </ul>	<ul style="list-style-type: none"> <li>• Comfortable with computers &amp; Excel</li> <li>• Previous volunteer experience with a food pantry...</li> </ul>	<ul style="list-style-type: none"> <li>• Passionate about the work &amp; community</li> <li>• Team-oriented...</li> </ul>	<ul style="list-style-type: none"> <li>• 10 hours/week to run the pantry...</li> </ul>	<ul style="list-style-type: none"> <li>• Previous volunteer...</li> </ul>

# 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 Timeline	Who will train them?
<i>Example:</i>  <i>Primary Agency Leader</i>	<ul style="list-style-type: none"> <li>• <i>Observe all existing Leadership Team members performing their duties</i></li> <li>• <i>Incoming leader begins practicing agency leader's tasks</i></li> <li>• <i>Incoming leader is involved in agency decision-making</i></li> <li>• <i>Incoming and current leader work together as equals to perform operational tasks for a particular period of time...</i></li> </ul>	<i>1 month...</i>	<i>Jane Doe...</i>

# “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:

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

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:

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

## 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 member agency continues serving hungry people in the community.

**REMEMBER!**  
“If it’s not in writing, it didn’t happen!”

**It is recommended that your member 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?

## About the Authors

Arkansas Foodbank partnered with three students from the University of Arkansas Clinton School of Public Service to build the capacity of its member agencies through the development of their own succession plans.

Information about the students who created this toolkit is listed below.

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# APPENDIX:

## THE ARKANSAS FOODBANK MEMBER AGENCY HANDBOOK

