SUCCESSION PLANNING CHECKLIST

Evaluate your current succession plan: can you answer these questions?

- What would happen if I/the person in our lead role was absent for three months? How would that impact our ability to distribute food?
- Who else could serve in the lead role if necessary? If only one person or none can be called upon, more work must be done to increase coverage.

WHAT YOU CAN DO NOW

- [ ] **Identify one backup**

  Neighbors rely on us for food, so there should be at least one additional person who can ensure that your agency is still able to operate if the lead volunteer/staff person is unavailable.

- [ ] **Confirm access for an emergency**

  In an emergency, more than one person should have the tools they need to access the agency, including keys to the building and any other locked function (i.e. mail) as well as codes or passwrods to necessary protected accounts. Your agency should also have more than one trusted person who can access organizational banking systems.

- [ ] **Make IFB aware of backup contacts**

  Contact your Agency Relations Coordinator so they can support succession planning efforts by including the secondary contact(s) in training or meetings and on key emails.

- [ ] **Develop a notification and communication plan**

  Have a plan on how to notify lead volunteers, your board, and IFB to activate an “all hands on deck” approach to coverage.

- [ ] **Encourage others to be involved**

  Consolidating tasks may be easier, but it is helathier for your agency to have multiple people who can carry out the mission. Bring a core group into the fold to share work, become familiar with processes, and further the legacy of your organization.

PLANNING FOR THE FUTURE

- [ ] **Create a list of key processes and tasks**

  Draft a simple list of operational practices that are important to the mission and how often they are completed. Don’t forget to include tasks that occur less frequently, like tax filings or reports to IFB. List the level of coverage needed for each key area, then prioritize practices critical to access food, like the ordering food and opening the pantry or kitchen.

- [ ] **Document systems**

  Once a list is made and prioritized, you can begin to document processes in a central location so others have a reference to consult when needed. Write them one at a time while you are performing the task, then have someone else follow your process and make adjustments as needed to ensure the notes can be followed by anyone if an “all hands on deck” approach is needed.

- [ ] **Clarify roles**

  There may be cases in which a seconary contact is identified and asked to serve strictly in emergencies. There may be others in whic the “backup” can take more of a lead role as preperations for long-term transitions are made. Be certain these roles are clear when asking people to serve in these functions to avoid confusion later.

- [ ] **Evaluate and confirm annually**

  Consult the list of priority operational tasks, secondary contacts, and progress toward documenting systems on an annual basis. Make sure all information is still accurate and curretn and identify any succession planning goals for the coming year.

VOLUNTEER ENGAGEMENT CHECKLIST

Having a committed volunteer base ensures that your agency can still operate without you in the event of absence, emergency, or change in leadership. It is important so you can best serve your neighbors, have long-term impact, and it is a sound nonprofit practice.

PLANNING

- [ ] **Identify what you need help with**

  Do you need help with regular activities like: packing, stocking, distributing, neighbor intake?
  Or do you need to fill specialized roles like: fundraising, event planning, or office help?

- [ ] **Identify what kind commitment you need**

  Do you require a time specific time commitment, or can you be flexible?
  For example, repack shifts have a set schedule that volunteers can pick from to fit their calendar. On the other hand, office hours would need a volunteer to committ to specific times on a regular schedule.

- [ ] **Create a system**

  Create and stick to a system for volunteer contacts that works for you. A basic system can consist of a form to collect basic contact information, and a place to store this information.

RECRUITMENT

- [ ] **Recruit for the mission**

  Find volunteers who are passionate about your mission long-term. You can encourage volunteers to stick with you by providing opportunities for growth in their responsibilities.

- [ ] **Create relationships**

  Get to know your local organizations - schools (including colleges), churches, and service clubs are all great places to source volunteer groups or people to host fund drives.

- [ ] **Be engaging**

  Be willing to educate recruits about your mission and allow them to get up close and personal with your work. Give a tour, invite them to other events, have a packing activity at community engagement tables, etc.

- [ ] **Word of Mouth**

  Tell your current volunteers of exciting or expanded needs so they can advocate and spread the word for you in their networks. They can also share your social media posts with their firends. Word of mouth is the best recruiter.

- [ ] **Advertise**

  Use all exiting media channles available to you. This includes social media, local city directories, newspapers, senior magazines or national sites like volunteermatch.com

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RETENTION

- [ ] **Communicate**

  Idetify a regular schedule that is sustainable and send messages to volunteers to maintain lines of communicatino. Highlight upcoming needs and include personal touches like service milestones and birthdays. This could take the form of a newsletter sent via email or mail.

- [ ] **Show impact**

  Be sure that volunteers understand how they are contributing to your oganization's mission. when people feel like they are making a positive impact, they are more likely to stay engaged and invested.

- [ ] **Set clear guidelines**

  Connect with volunteers in advance to let them know what their experience will look like and allow them to ask questions.

- [ ] **Create a community**

  Volunteers return because of an authentic relationship with the people and the organization. Share your WHY with volunteers, and invite them to share theirs.

- [ ] **Show appreciation**

  Aside from a heartfelt thank you, you can send an email, card, give a social media shout out, or even a small gift (this doesn't have to cost much - attach a note with you were MINT to make a difference to a bowl of mints). April is Volunteer Appreciation month - host a luncheon or have special treats on hand for them to take.

- [ ] **Ask for Feedback**

  Survey your current volunteers. They have experience with your program and can provide valuable outside perspectives. This also demonstrates that you value their opinions and preferences.