

SUCCESSION PLANNING WORKSHEET

- Succession planning is the process of identifying potential leaders and training them to fill key positions in the future.
- Succession planning ensures that a Partner Agency can continue serving its community even if the key leader is absent for a short or long period or is planning to step down.
- Use this worksheet to identify the key roles and operational processes at your agency. List the coverage available for each area in order to identify gaps in coverage and training needs. Then, begin to document these operational processes in formal written procedures for your agency. Please customize the table below to reflect the operations at your site.

Operational Process:	Coverage - Lead:	Coverage - Back up:	Process Documented in Written Procedures? (Y/N)
Pantry Oversight			
Placing Orders			
Picking up Orders			
EPFH Reporting			
Distribution Procedures			
TEFAP Intake and Eligibility			
Required Forms			
Food Safety and Storage			
Record Keeping			
Cleaning / Maintenance			
Managing Volunteers			
Administrative Operations (ie. taxes, rent, utilities)			



Operational Process:	Coverage - Lead:	Coverage - Back up:	Process Documented in Written Procedures? (Y/N)

