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**Sustainability and Succession Workshop**

**What is a sustainability plan?**

A sustainability plan is having the financial and other resources in place to ensure your program’s longevity. If you are too dependent on one funder or one event, for example, sustainability is an issue. Diversify revenue sources!

**What are the benefits of having a sustainability plan?**

Having a sustainability plan ensures your program will continue without interruption. Why do companies promote from within? Because internal promotions shorten the learning curve and ensures minimal disruption to customer service. The children we serve are our customers. Having a sustainability plan in place will serve your Blessings children as much or more than any other thing you go out of your way to do for them.

**What is a succession plan?**

Succession planning means you anticipate turnover of volunteers delivering the program and plan for their replacement.

**Why do you need a succession plan?**

There’s a saying...“Graveyards are full of indispensable people”. Developing a succession plan for your Blessings program requires you to take a good hard look at the risks your program will face if you are not around. If all the knowledge, experience and relationships you possess go on sick leave with you, or move to another state with you, there’s going to be fallout. Not having a succession plan in place opens your program up to disruptions in operations and can create uncertainty about the future of the program. Seeing your Blessings program thrive after you step away will be your single biggest achievement. Don’t leave your legacy to chance.

**I know why I need a sustainability and succession plan but how do I create one?**

You may not have an organized committee or board, so to quote Regina Jackson-Willis who is the PC for one of our Louisville programs, “You gotta get yourself some people!”. For those of you who do have an organized committee, board or large group of volunteers, but have not prepared for the day you step away, you need to start planning as soon as you return from this conference.

* **What first steps should I take?**
* After you “Get yourself some people”, you need to start structuring your board in a thoughtful way.
* Have a clearly defined process in place.
* Ask your existing team to look for candidates from their circle of friends, family, colleagues, neighbors, church, clubs, etc. (Personal Treasure Map)
* Create a job application and description. (Supporting documents included)
* Have at least three people on your board/committee evaluate the applications. If you have already established an advisory board, the Executive Committee, should evaluate the applications.
* Share final list of candidates with the entire board/committee for final approval.
* **What is the importance of establishing clear job descriptions?**
* Studies show that collaboration improves when roles are clearly defined and well understood. Without clarity, board members are likely to waste energy negotiating roles or protecting turf, rather than focusing on the task.
* **Why is it important to set term limits?**
* Involving more board members aids fundraising. Former board members are the very best ambassadors for your program.
* **New members bring additional talents and perspectives.**

### **Term limits allow for removal of bad board members.**

* **What is the most important element of a strong committee or board?**
* Diversity – Boards that are not diverse risk becoming stagnant. If all the board members travel in the same social circle, identifying and cultivating new board members and donors will be a constant challenge. Look for candidates with a variety of professional expertise, cultural backgrounds, life experiences and age groups. When your board reflects the diversity of the community served, your program will be better able to access resources in the community through connections with potential donors, collaborative partners and policy makers.

* **What skill sets should you look for when recruiting board members?**
* Marketing (social media, website development) – typically, younger generations are proficient in navigating social media sites and make great candidates for this position. Individuals from news outlets, marketing experts from local businesses or recent college graduates with degrees in marketing.
* Finance – people with a background in accounting, banking and financial planning.
* Leadership – business owners, civic leaders and PTA presidents, business managers, retired teachers
* Fundraising – civic group members, PTA members, grant writers and event planners.
* Legal – although committees and boards do not require legal representation, you may want to consider recruiting an attorney, judge or paralegal, as they often lend a different perspective and usually possess valuable leadership skills.
* Food Industry – having someone with a food background is a natural fit for an organization that provides food. If they represent a local grocer or food distributor, they may be able to help lower your food cost. Restaurant owners, chefs and management groups, often have connections that can help with food costs, event catering and venues.
* **Should board members be required to donate?**

 Yes, and here’s why.

* Because it’s the best way to ensure that each board member has “skin in the game”.
* It’s also a public declaration that the board members have invested in the charity.
* It indicates the board members have a commitment to the organization and its mission.
* Many major donors and foundations will not support a charity unless the board achieves 100% giving. 100% of giving can be achieved through gift-in-kind donations instead of monetary. You can place a value of $24.69 per hour of time given in support of your program. Additionally, if board members donate their time and skills to develop a website, cater an event, or any other tangible form of support, record the value of their services plus time served.

**Why is it important to align with or be consistent with the national plan to create support in the local community?**

It’s important to ensure your good intentions result in successful and sustainable programs.  National provides support with program implementation, marketing, public relations, administration, and fundraising tools.  You are not alone and do not have to reinvent the wheel as you strive to end childhood hunger.  National can help provide the guidelines and framework to make your program a success!

**Discuss the evolution of the Louisville Chapter Advisory Board. When community members took it to the next level as the Louisville Committee, what changed?  What factors drove the change?**

“When I (Jennifer Lamkin, Board Chair) joined the board, we were only meeting every other month and our growth seemed to stagnate.  Then we were faced with the decision to determine which schools we should put on notice that their funding may run out.  Collectively, we decided that we could never look a child in the face and tell them we could no longer provide their Blessings in a Backpack.  At that moment, our board rose to the challenge and decided to meet monthly and make the commitment to the children currently in our program and of our community.  The change was driven by a few assertive people, a lot of hard work, support from National and the addition of our Managing Director, Kim Holsclaw. Because of our decision to take our loosely formed “Committee” and structure it as an Advisory Board, we now have a surplus in our account for the first time. We are proof the system works!”

**What are the benefits of having a formal advisory board?**

* Power in numbers
* Connections within the community
* Varied areas of expertise & talent
* Volunteer support
* Division of labor
* Representation of your community

**A couple more things to consider…**

1. The Advisory Board structure can be applied to small groups as well. Plan for the time when you step away by making sure others in your group understand how the program runs. Pertinent information you should relay includes: food vendor contacts, school personnel contacts and annual event details. Make introductions so all parties will feel comfortable communicating. Create a binder with all of this information so it can be easily passed on to whoever is next in line to run your Blessings program.
2. Remember that you are forming *advisory* boards and committees, which do not have the fiduciary liability and responsibility of a Board of Directors, such as that of the National Blessings Board of Directors.

***Please visit the PC Toolkit to find document templates referred to in this presentation.***

Blessingsinabackpack.org > Our Programs > Password: mealsthisweekend! > Managing your program