

LIFT Community Action Agency, Inc.
Succession Plan Detail
DATE

Name: _____, *Executive Director*

First Backup: _____, *Title*

First Backup Support: Provides support in collaboration with Macy Self, Associate Director

- Personnel Management: *Dawn McDaniel, Human Resource Director*
- Grants, Planning & Public Relations: *Rhonda Teague, Director Planning/PR*
- Financial: *Sheree Ensley, Fiscal Officer and Sheree Ensley, Accounting Supervisor*

Second Backup(s): _____, *Title*

Second Backup Support: Provides support in collaboration with First Backup Support

- Personnel Management: _____, *Human Resource Director*
- Grants, Planning & Public Relations: _____, *Director Planning/PR*
- Financial: _____, *Fiscal Officer and Sheree Ensley, Accounting Supervisor*

Short-Term Staffing of Key Functions

Key Functions	Short Term Staffing Strategies <i>(Define Short-Term: (Up to 3 months))</i>
Provides direction, guidance, & assistance to initiate program activities including: <ul style="list-style-type: none"> – Grants & Operations Management – Public Policy & Public Information – State Plan Dev., Monitor Report – Planning & Project Development 	Name, Associate Director (in collaboration with) Name, Fiscal Officer Name, SR Planner Name, Director Planning/PR
Directs and oversees fiscal affairs of LCAA	Name, Fiscal Officer
Manages and oversees personnel functions	Name, Human Resource Director
Provides support to the Chair, Board, Committees and Board Members	Name, Associate Director Name, Human Resource Director
Ensures effective relationships with state agencies, disability community, Governor's office, state legislature and federal agency	Name, Director Planning/PR <u>and</u> consultation with Board Chair

Notifications:

Notify: Temporary Leadership Change	Accountability: Person to Send Notification	Timeline: Notification to be Made
Board Chair		ASAP
Executive/Personnel Committee		1 – 2 hours
Program Directors		1 – 2 hours
Accounting/Payroll, HR, Others as Appropriate		1 st 4 hours
Board Members		1 – 2 days
Staff		1 – 2 days
Governor's Office		1 – 2 days
Grantees as needed		1 st Week
State Agency Colleagues		1 st Week
Oklahoma Secretary of State		1 st Week
Other Interested Parties		1 st Week

Contact information for the above contacts is located in the following:

- Contact Information
- Membership
- Agency name Who to Call
- Grantee Database

Required Contact Information Lists for the Above Contacts to be Developed:

- *State Agency Colleagues*
- *Governor's Office*

Cross-Training Plan (on Executive Director Role)

Training Area	Staff to be Cross Trained		Timeline
	Trainee	Trainer	
Grants and Regulations Training: Self-Review			Ongoing

Attachment # 2

Board Relations Activities and Coordination			Ongoing
Issues/Topics of Board, Board and Government Office			Ongoing
Understanding of How to Develop Agendas, etc.			ASAP Develop Written Procedures