**(Name) Farmers Market Succession Plan**

In the event that the Farmers Market Manager leaves, for any reason, it is critical that a plan be implemented to seek a replacement, as quickly as possible, to maintain the smooth operation of the farmers market, operating the market’s programs, as well as maintaining the market’s relationships and status within the community. The following plan will help the board of directors (market committee, governing body) through the selection process and the transition to a new Market Manager. While not every market will chose to follow the plan exactly, this will give you an overview of the process and the resources to help you find a replacement manager that will fit your market’s needs.

1. **Transfer the information.**

Part of the plan includes the transfer of records and processes. The current manager, prior to departing, must present all market records relating to the everyday operations of the markets, including, but not limited to:

* Roster of market’s farmers and vendors, including contact information, product licenses, insurance records
* Market insurance policies and insurance carrier contact information.
* Name and contact information for all market partners, sponsors, donors, funders, and service providers
* All market permits and licenses required to operate market, including contact information
* All SNAP equipment and records, including Certificate of Authorization, SNAP transaction logs, processing equipment and log-ins.
* All records of any SNAP coupon incentive programs used by the market, including authorizations, process and contact information for re-applying
* All records for FMNP (Farmers Market Nutrition Program), including authorizations, process and contact information for re-applying
* All records and procedures for any ongoing market programs, including contact information for any partners, funders or organizers.
* All market organizational documents, including contact information for market board of directors, market bylaws, market rules, market applications, and all others that may exist
* Passwords to all electronic sites, including website, social media, or any other electronic processes for the market

If the current manager will be staying on through the transition process, the documents and records can be transferred direct to the new hire. However, if the manager is not able to stay through the process, all records need to be transferred to an interim manager, board president or other member of the management team before departure. Once the new manager is hired and in place, all records are then transferred to the new manager as part of the orientation.

1. **Select an interim manager.**

Ideally, the current Market Manager will stay on long enough to work with the Transition team to transfer institutional knowledge and experiences. The current Market Manager would then provide training to the new manager.

However, the current Market Manager may not be available to stay on long enough to work with the transition team and hire the new Manager. In that case, the board (governing body) must select an interim manager. This person will lead the organization temporarily while the search goes on for the replacement Market Manager. The Interim Manager could be a board member or trusted staff member, but would ideally be someone with familiarity of the core programs and functions of the market. The selection must be agreed upon by a majority of the full board of directors (governing body). The Interim Manager will work the same hours and responsibilities as the outgoing market manager, unless other arrangements to cover specific manager duties are made by the full board (governing body). If the market manager is a paid position, then the Interim Manager should also be compensated, at least 50% of the manager’s salary.

The Interim Manager, if a board member, must abstain from any board votes for the Interim Manager position once their name is offered for consideration. If appointed, the Interim Manager must temporarily step down from the board. They may resume their position once the new Market Manager is in place and they have stepped down from being Interim Manager.

The Interim Manager will manage the day to day operations of the market, including all key market programs and positions within the community. If the market’s bank accounts include the manager as a signor, the accounts will need to be adjusted to remove the resigned Market Manager and add the Interim Manager as a signor on the accounts. However, all expenditures should be pre-approved by the board of directors.

The Interim Manager will report to the Transition team and the full board of directors (governing body). Board approval will be required for all actions taken that are not a regular part of the core programs, normal market procedures and those actions dictated by current grant funded projects.

Finally, the Interim Manager will be the official spokesperson of the Market during the search for a new Manager. However, all communications must be approved by the transition team.

1. **Form a Transition Team**

Upon receiving word of the impending departure of the current Market Manager, the board (governing body) will form a transition team. This team should consist, minimally, of the board officers (members of the governing body), and representatives of the market sponsor. You should also include the outgoing manager, if they are available and willing. They will have unique experiences and insight that others will not have. Consideration should be given to including select market vendors and representatives of the market’s partnering agencies.

The full board should set a reasonable budget for the work of the transition team to cover advertising the position, as well as any other incidental expenses relating to the hiring process. The board may also consider reimbursing candidates for travel, if their travel exceeds 100 miles. Members of the transition team will serve on a volunteer basis.

The transition team will report their progress to the full board on a regular basis. It is recommended that the full board meet at least monthly through the transition as the transition team will need board input on many key decisions, as well as their overall approval of the process and selection of the new Market Manager.

The Transition team will be charged with the following responsibilities:

1. Review the current Farmers Market Manager job description. The job description should be revised to identify key competencies needed for the operations and programs that are currently in place, as well as the future needs and trends of the market. Along with the job description, include the compensation range and hiring package to be offered to the incoming Farmers Market Manager. The final job description and salary level must be approved by the full board.
2. Advertise for the Manager position. The announcement should be placed on the Market’s website, social media, local, state list serves, Ag organizations’ newsletters, and other ag-related news sites. Local newspapers and online job recruitment sites can also be used to post the job announcement. The announcement should direct potential applicants to the Market’s website for the full job description, application and instructions for submitting resumes and application. Include a deadline for applying in all communications.
3. Prepare an announcement to all major funders, partners and stakeholders indicating the change in leadership, introducing the Interim Manager and assuring all that the market will continue to run effectively and efficiently under the Interim leadership. The letter should also indicate when the search for a new Manager is anticipated to be complete. Provide contact information for any follow up by the funders, partners and stakeholders.
4. Performance goals for the new Farmers Market Manager should be identified. The goals should be approved by the full board (governing body) and will help guide the interview process. The goals should include direction in the following areas:
	1. the core market programs, such as SNAP, volunteer program, events/entertainment schedule
	2. relationship building with vendors, funders, partners, board members, and stakeholders
	3. fundraising
	4. new program development
5. Collect and review applicant resumes. The team should review all applications and resumes, selecting the top few that best meet the criteria designated by the job description. Eliminate those that do not possess the required credentials, then rate the remaining resumes according to experience, skills and availability. The top five candidates can then be contacted to schedule interviews.
6. Prepare an interview team. The interview team, consisting of the transition team and invited stakeholders, will prepare a set of interview questions that will help bring out the skill sets, experience and personality of the candidates.
7. Conduct background checks. After the interviews are complete, the transition team should rank the candidates. The top 2 candidates would be selected and their references called and a background check made (review social media, law enforcement records and financial review) to ensure the candidate is appropriate and can be bonded.
8. Report choices to the full board (governing body). Once all references are checked and a candidate is selected, the transition team should prepare a full report to the board on their choice of candidate and why. The board should convene a special meeting to discuss the chosen candidate and give their approval.
9. Make the offer. Once the board has approved the candidate selected, contact the approved candidate and come to an agreement on when the new Market Manager will begin and the salary level approved. Be sure the candidate understands the job is contingent upon a successful six month probation period.
10. The interim manager steps down. Once the new Market Manager begins, the Interim Manager will step down, but remain as part of the transition team to train and evaluate the new Manager.
11. **Orientation of the New Manager**

Once the new Farmers Market Manager has been hired and the compensation package has been agreed upon, the transition team moves into training and orientation mode. To start the process, the transition team will provide organizational documents to the new Market Manager prior to his/her first day to help them to understand the market’s mission, operations, activities and policies. Provide the new Manager with the following:

* Market Bylaws or governing documents
* Market Budget
* Market rules
* Market Policies
* Market procedures/documents for operating programs, events
* Contracts/Agreements with market sponsors and/or funders

During the first week in the Manager role, the transition team should provide an orientation. This would include:

* A general review of the ongoing procedures, rules and programs of the market and the role the market manager plays in each of these.
* The performance goals and expectations of the Board for the Market Manager, as developed by the transition team and agreed upon by the Board during the search process. The transition team will meet monthly with the new manager to review progress on the performance goals, discuss issues that arise and help provide direction to the new Manager as they become acclimated to the position.
* The orientation should discuss board relations. Identify the role of the board, introduce the board members and advisors, discuss the board meeting/annual meeting schedule and the role of the Manager in preparing for and participating in these meetings.
* The orientation should discuss the financial position of the organization, where the funding comes from and expectations for future funding
* Key funders, partners and stakeholders should be discussed; what is their relationship with the market and how are communications handled. Include the expectations for the manager is working with each partner, funder, stakeholder.
1. **Operational changes**

The passwords to all online accounts, computer, etc should be updated for the new Manager, including providing email access.

The Market’s bank accounts should be amended to show new authorized signatures, if the manager role includes financial responsibilities

During the initial 6 month trial period, the Market Manager will be required to seek approval from the transition team before any decisions are made that change market operations, programmatic changes, or alter the manner in which the market currently does business with any funders, sponsors, partners or stakeholders. The goal is to ensure that all changes are mission-driven and provide a forward direction that all board members can be comfortable with.

The transition team should prepare and disseminate a letter to all funders, partners, stakeholders and members to introduce the new Market Manager.

1. **Six Month Probation period concludes**

At the end of a six month trial period, the transition team should evaluate the performance of the new Market Manager. An Evaluation Report should be made to the full board (governing body) for discussion and approval as it will be used to determine whether the employment of the Farmers Market Manager should continue on a permanent basis or the search for a replacement should be started once again. If the evaluation is positive and approved by the board (governing body), then the transition team can be disbanded the normal operations of the Market will resume.