

_____(organization name)_____

Leadership Development and Continuity Plan for:

(position name)

Date: _____

This document is intended to help foster leadership development and prepare for the transition to new leadership in the event of planned and unplanned, temporary and long-term changes. These may include:

1. **A Planned Change for a Short Term:** This temporary change is one of less than 3 months. It is anticipated that the manager will return (e.g., family leave, professional training, etc.)
2. **An Unplanned Change for a Short Term:** This temporary change is unexpected and often a short-notice announcement. There is an expectation that the manager will return within 3 months. (e.g., personal or family illness, family emergency, etc.)
3. **A Planned/Anticipated Change for Long-Term Absence/Replacement:** This change in leadership may be the result of the manager's approved leave of absence of longer than 3 months or a manager's upcoming retirement, family move, sabbatical, or planned resignation.
4. **An Unplanned Exit/Replacement:** This change in leadership is unanticipated, relatively immediate, and may be associated with a manager's dismissal, resignation, or sudden onset of a serious illness or family crisis.

Leadership Development is promoted within the organization by fostering talent and skill within individual team members. Encouragement and recognition of an individual's interests, competence, and potential can strengthen the unit's ability to meet goals, surpass expectations, heighten morale, and prepare the unit for a smooth transition in leadership should a change occur with advanced or short notice.

Any change in leadership can be made easier on remaining staff, and any incoming personnel, if planning is done ahead of time to anticipate important and necessary tasks and responsibilities for the managerial role. Managers are encouraged to take time to think through their daily, weekly monthly, and annual responsibilities, communications, and networks, and outline important information to help guide that transition. The following template is provided as a guide. When completed, the succession plan should be reviewed by the executive director and reviewed annually during the manager's annual performance review to ensure it is up-to-date.

Planned Permanent Departure

(Other situations are addressed at the end of the plan.)

Succession Planning for a Departure		
Potential replacement person		
Is temporary outside help or reorganization of work needed until a new person is hired?		
If so, for what asks/roles?		
Go-to persons and areas of knowledge (adapt these categories and below as well to the position)	Financial	
	HR	
	Programs	
	Fundraising	
	Comms/Mkting	
	(other)	
	(other)	

New Person Must KNOW/LEARN

List the most important knowledge they must gain right away. Change these categories to the appropriate ones for the position.

Financial	
HR	
Programs	
Fundraising	
Comms/Mkting	
Partnerships	
Board	
(other)	
(other)	

New Person Must DO

Priority Tasks to Be Completed Immediately

Date Due (if relevant)	Task

Calendar of Major Tasks to Be Completed for the Year

Month	List 3-5 primary tasks each month
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Primary Daily tasks	
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Primary Weekly tasks	
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Primary Monthly tasks	
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Key Contacts (or the Location of Communication List)

Contact's Role with the agency	Name and contact information

Other Situations

How would the plan above change in the below circumstances? Who would fill in? What tasks could be put off for a temporary absence?

Expected temporary absence (less than 3 mo)	
Unexpected temporary absence (less than 3 mo)	
Unplanned permanent change (vol or invol)	

Who are the current staff who might grow into this role?

Name	Key areas to develop and timeline to prepare for the role