

SUCCESSION PLANNING GUIDE

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HOW TO USE THIS GUIDE

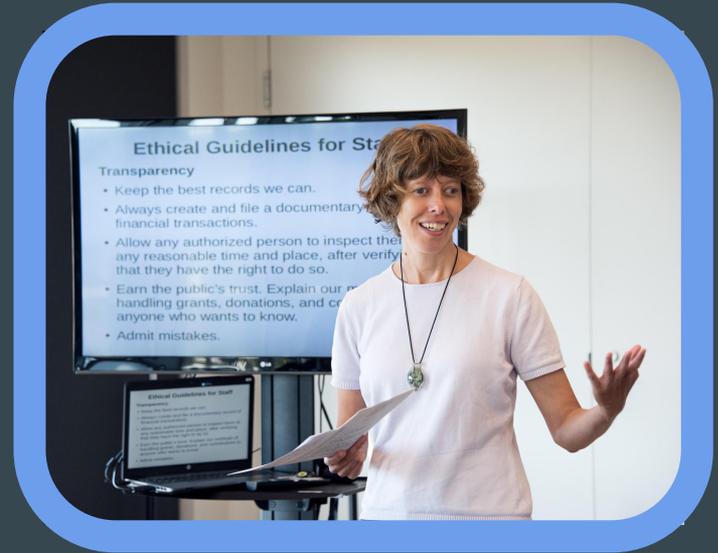
Succession planning can be an overwhelming topic if you are just getting started. I kept this guide short but included links to a wealth of resources so you can choose your areas of focus.

You don't have to do it alone! See pages 11-12 to join your peers in creating your long-term succession plan.



ABOUT INGRID KIRST CONSULTING

- 4 years as a nonprofit consultant, with a special emphasis on helping organizations plan for leadership development and executive transitions.
- 23 years in the nonprofit sector in a variety of paid and volunteer roles, including 11 years as an executive director.
- Formal training and experience in facilitation both in-person and on-line, including strategic planning and organizational development.



SUCCESSION PLANNING FOR SUCCESS



Below are the key ingredients for a full succession plan to help all organizations prepare for an eventual leadership transition. Improving your leadership capacity and operations will make future growth easier. These documents should be developed through a collaborative process involving the executive director and board members.

SUCCESSION PLANNING DEFINITION

“Create a continuity of leadership at all levels to sustain the organization and safeguard its mission.”

It's not just about finding the replacement for the executive director. It's about making intentional choices to focus on building up leadership capacities in both the board and the staff. The focus is always on the long-term health of the nonprofit, which helps reduce anxiety around the topic.



SUCCESSION PLANNING BENEFITS

Succession planning does take work, but the benefits are huge:

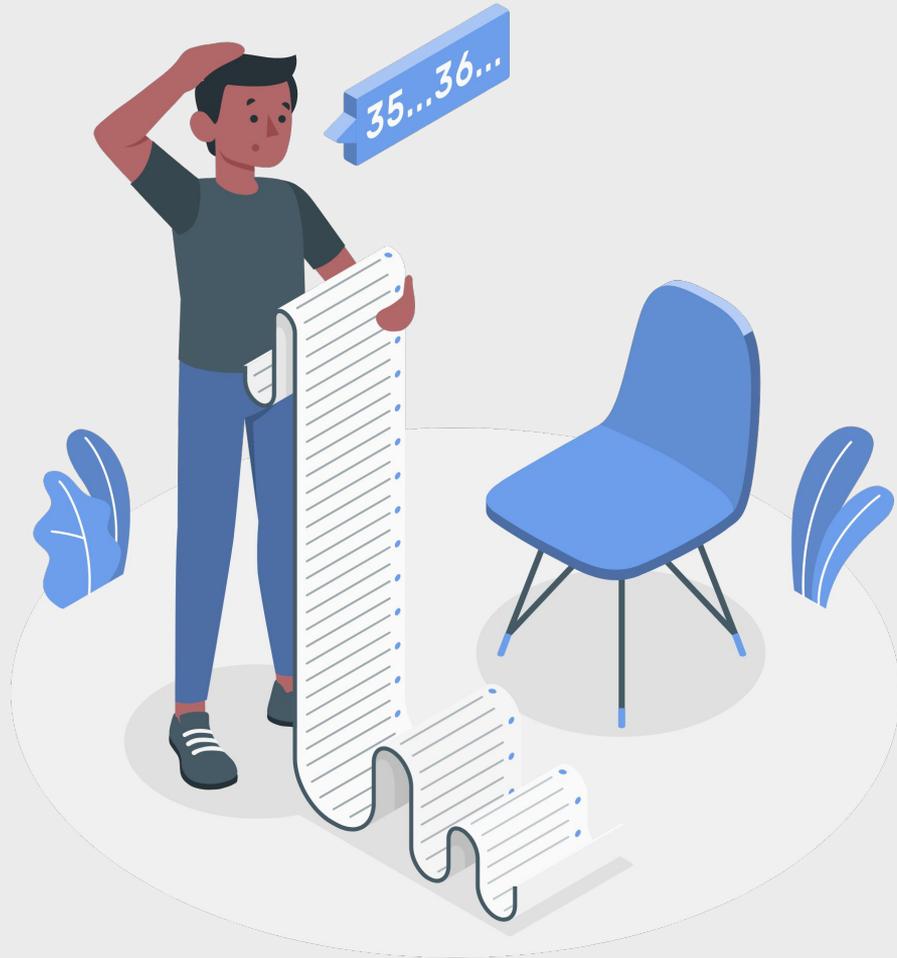


STEP I: EMERGENCY SUCCESSION POLICY

First, the adoption of a succession policy by the Board of Directors will authorize the organization to immediately enact a series of steps that will help to continue service to people and the community during short-term absences or following the departure of the Executive Director. The policy should cover appointments for an acting executive director, the board's responsibilities, and a hiring process.

[DOWNLOAD AN EDITABLE
EMERGENCY SUCCESSION
POLICY TEMPLATE](#)

STEP 2: OPERATIONS MANUAL



This manual will include the location of key agency information including bank account information, critical passwords, people to contact in an emergency, and a communication plan for an emergency.

All key employees should complete a list of their tasks and what they need to do them. It does take time to put this together, but it will pay off tremendously for vacations, tracking rarely used information, and eventual departures.

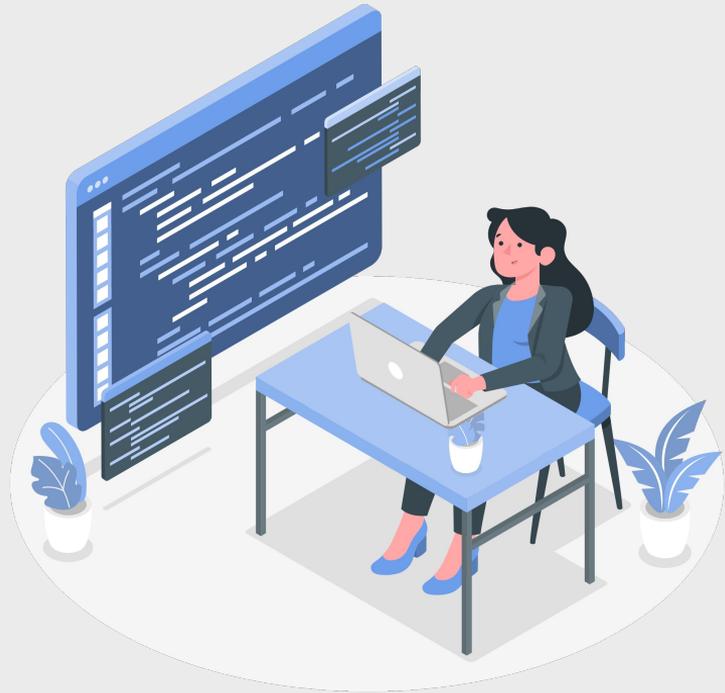
[Click here for advice and templates to get started.](#)

STEP 3: LEADERSHIP DEVELOPMENT PLAN



Who are the potential future leaders in your organization? Whether or not they are future candidates for the executive director, train them now to take on leadership roles, and they will be more engaged employees. In addition, develop a strong assessment process for all staff, including the executive director, so that everyone can develop their skills. [More tips and samples are here.](#)

STEP 4: EXECUTIVE TRANSITION PLAN (OPTIONAL)



For organizations who are actively planning an executive director transition in the next year, an executive transition plan will give you the detailed steps you need to take. What are the big organizational changes that need to be made before a new executive can take over and be successful? What are the little nagging tasks that shouldn't be left for the next person? Detailed conversations can ensure that the organization thrives under its new ED. [Read more about creating these long-range plans here.](#)

SUCCESSFUL TRANSITIONS COURSE

Feeling overwhelmed after reading all of this? Good succession planning takes time and energy, but the good news is you don't have to go it alone. The Successful Transitions Course lets you work with a group of your peers to finish your plan.



SUCCESSFUL TRANSITIONS COURSE



INTERACTIVE VIRTUAL GROUP SESSIONS

The five group sessions will cover all of the main topics of succession planning and leave plenty of time for robust discussion.



BOARD TRAINING

Each organization will have a customized training for the full board so that everyone is on the same page.



INDIVIDUAL COACHING

Every nonprofit has its own unique challenges. In the individual coaching sessions, we can come up with solutions so you can get your plan done.



COHORT OF YOUR PEERS

You'll be part of a small group of organizations (maximum 8) so you can support each other as you work through your succession plan.



REGISTER FOR THE SUCCESSFUL TRANSITIONS COURSE

Don't waste energy worrying about when you'll work on your succession plan. Join the next Successful Transitions course and get started now!

[CLICK HERE TO
REGISTER FOR
SUCCESSFUL TRANSITIONS](#)

ADDITIONAL SUCCESSION PLAN RESOURCES

FEDERAL RESERVE SUCCESSION PLANNING TOOLKIT

This detailed toolkit includes case studies, what to do in various situations, and succession plan templates. ([link](#))

NONPROFIT ASSOCIATION OF THE MIDLANDS EXECUTIVE TRANSITION TOOLKIT

This toolkit provides a lot of forms and information for organizations currently preparing for a transition. ([link](#))

COMMUNITY ACTION GUIDE

This three part guide is full of great information on all stages of succession planning. ([link](#))

BUILDING LEADERFUL ORGANIZATIONS

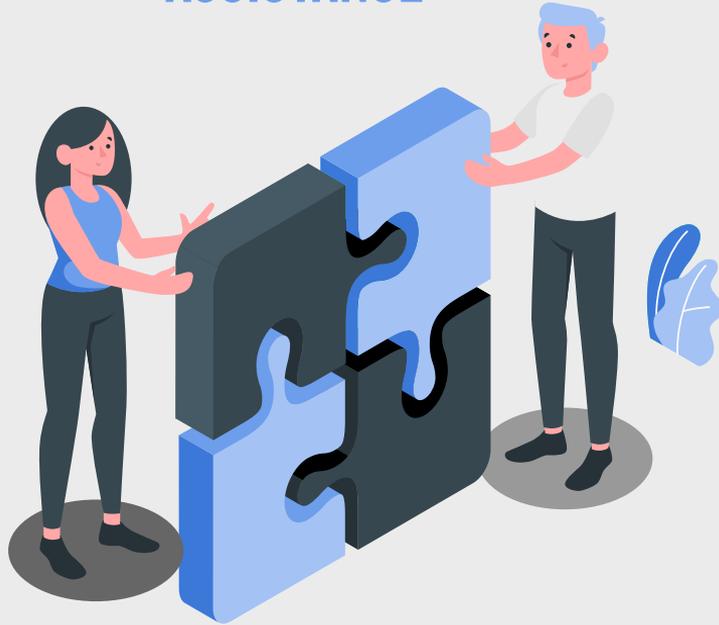
From the Annie E. Casey Foundation, this document summarizes why and how we need to think differently about succession planning. ([link](#))



SUCCESSION PLANNING ASSISTANCE

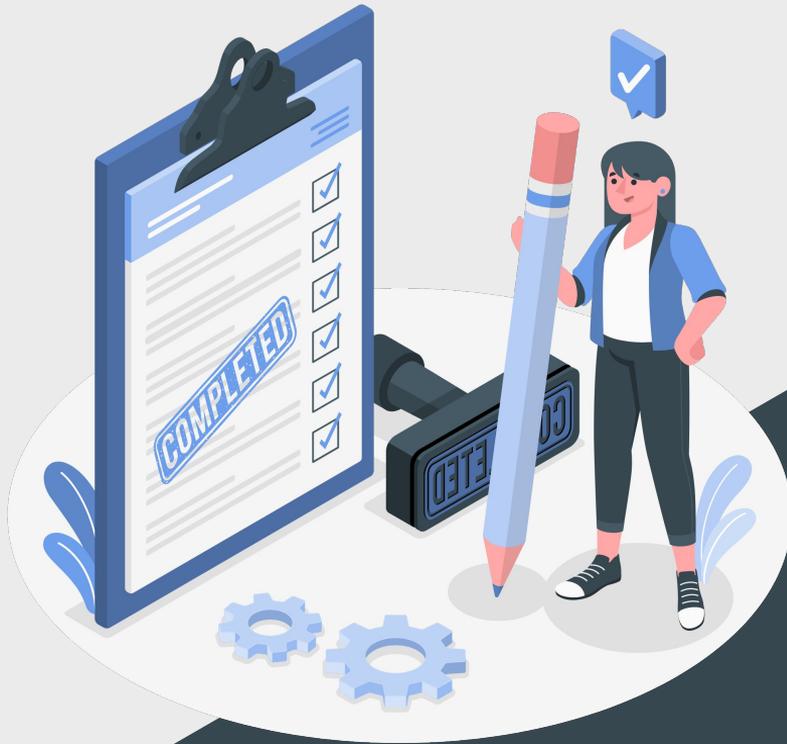
HOW CAN I HELP?

Let my wealth of knowledge and experience help you. Please reach out to schedule a complimentary hour succession plan review and to talk through your next steps.



CONTACT INFORMATION

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FINAL THOUGHTS

Succession planning isn't a one time event. It's an ongoing process to build up your organization's leadership. Contact me for assistance in any area of developing your succession plan.

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