



Target #3: Succession Planning

"We knew, we saw it coming, we've had conversations, we have a roadmap, we have a communications plan, we've got this. When the staff and stakeholders feel like the Board has got this, the organization feels settled and confident, and that's another way you set up the new leader to succeed."

Joan Garry

- Key to transition rests within the Board
- Takes more time than anticipated-start three years out
- ED should think in terms of bucket list-ideally, how do i want to hand this over?
- Create a roadmap for the Board
- Who should chair the committee? Someone other than Board chair-can be made up of investors, community members, some Board, etc
- ED Work Plan-create 5-10 things to complete before departure from role-check in quarterly
- Create a communications plan-create versions for different audiences

Board gets handed the power, the ED sets the tone for the final years.

ED creates a transition plan for the Board to have some structure and format for a very formidable task.

They will never have a more important task for the organization.





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Nonprofit Founder Departure Challenges

- Stakeholders may fear that the organization will flounder without the founder
- The organization may not have the resources to hire the board's candidate of choice for the position.
- Organizational funding may be dependent upon the founding chief executive's network and relationships
- Staff may fear change, and morale might suffer
- Organizational structures and systems may require strengthening



LEADERSHIP TRANSITION SCHEMATIC

