

TIPS FOR PLANNING LEADERSHIP TRANSITION

TIP #1: *Get ready: change is inevitable.*

Two thirds of nonprofit executives plan to change jobs in the next five years; odds are that your organization will have leadership transition.

TIP #2: *Discuss succession planning.*

Whether a long-time board leader is retiring or the executive director is changing jobs, succession planning can ensure organizational continuity. Develop the plan with the executive director and at least one member of the Board.

TIP #3: *Implement back-up systems.*

Just as computers need to be backed up, your organization's key information must be stored outside of the human brain. Create operational manuals with critical information; share and discuss them.

TIP #4: *Build the bench.*

Wise executive directors are always planning for succession by mentoring staff and sharing decision-making authority.

TIP #5: *Create a culture of openness.*

The Board and senior staff should know the names of major donors, be familiar with current projects, and understand the organization's financial and strategic position.

TIP #6: *Have a communications strategy.*

Call major donors, funders and partners first; plan the message and timing before announcing a transition.

TIP #7: *Designate an interim leader.*

Identify a staff or board member who can step in on short notice. Involve them in emergency planning.

TIP #8: *Support the transition.*

Take time to honor the accomplishments of long-term leaders. After years of service, the transition may be difficult. Respect their desire to continue to be engaged or to move on.

Need a hand managing transition? WE CAN HELP!



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