theforakergroup
Standing Beside Alaska's Nonprofits

Leadership Staff Succession Plan – Template for Table of Contents

***Disclaimer**: This document is not intended as legal advice. Your organizational goals, purpose, bylaws, and values should drive the creation of this document.*

Notes:

- Sections of the table of contents can be modified based on the mission and structure of the organization.
- The term EXECUTIVE includes any leadership title for a nonprofit leader or a tribal administrator.
- The term BOARD also applies to a TRIBAL COUNCIL.

Intention of a succession plan:

- This is the official space to hear the voice of the current executive. This is especially important if there is a founder and/or long-time leader in the position. Since this person is not part of the hiring and selection process of the next leader, documenting their voice is paramount.
- This document intends to eliminate as many surprises as possible for the board and current staff at such a time that it is needed. Ideally, this plan stops a "rush to search" reaction.
- The plan is a high-level document that answers major questions about the first steps and major steps once a transition is announced.
- It serves as a reminder of items the team should think about well in advance of a transition including board stability, market competitiveness, and staff stability.
- The plan is a place to capture the current institutional knowledge, philosophy, culture, leadership development gaps, etc. This is not a plan to name an heir apparent.
- All the steps after this plan will be captured in a transition process led by the board for a new executive and led by the executive for all other staff.

Recommendations for completing a plan:

- This plan can be drafted by a small team including the current executive and board members or drafted by the executive in consultation with a facilitator.

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- We recommend a process to that allows the board buy-in and feedback as it is their job to engage in an executive transition process not the current executive.
- The board should approve any plan about the executive.
- It is helpful to review this plan every few years or after significant changes in the board or organization
- For more information on the creation or implementation of this plan contact The Foraker Group info@forakergroup.org

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Table of Contents

SCOPE OF THE PLAN X

- Background on the organization or context impacting this plan
- Scope of the plan *(ex: executive and other leading staff or just executive)*
- Definition of planned and unplanned succession
- Approval/Adoption/renewal of plan process

CLARITY OF CULTURE X

- Core Purpose / Mission
- Core Values and Guiding Principles
- Long-term goals *(strategic plan in addendum)*
- 3-5-year goals to consider during a transition
- Commitment to diversity, equity, and inclusion *(add supplemental statements to addendum)*
- Internal philosophy/considerations for internal and new leadership development and hiring
- Clarity of Workplace Designation *(or reference to current policy or practice as it relates to the executive)*

CLARITY OF STRUCTURE X

- Collaboration, strategic partners, and merger considerations before pursuing transition
- Organizational staff chart *(current and proposed)*
- Overall descriptions, philosophy, and roles of the executive for future consideration
- Economic engine definition and considerations of the role of the executive

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ROLES TO IMPLEMENT THE PLAN* X

- Role of the current executive in planned transitions
- Role of staff in planned transitions
- Role of the Board of Directors and board chair during executive transition only
- Role of the Transition Committee and chair *(proposed high-level job description in addendum)*
- Intent to hire external support for transition *(ex: Foraker Leadership Transition service)*
- Intent or considerations in the use of an interim director *(guidelines in addendum as necessary)*

**If this plan includes other staff beyond the executive, note that the role of the board and the existing executive along with other staff if it differs from the transition of only the executive.*

MAJOR ACTION STEPS AND TIMELINE OF PLANNED TRANSITION X

- Approach to interested internal candidates *(staff and board)*
- Proposed high-level preferred timeline
- Exit timing of the current executive
- Reminders on the role of the board to prepare for the transition
- Reminders of the role of the board during the search
- Reminders to the board during onboarding *(ex: setting the new person up for success)*

COMMUNICATION PLAN WHEN THE TRANSITION OCCURS.....X

- Communication plan reminders for transition including key stakeholders who need to be notified and key messages

HIGH-LEVEL BUDGET CONSIDERATIONS FOR TRANSITION X

- High-level budget projections for transition support
- Graceful exit budget considerations for outgoing executive
- Salary and benefits considerations for future transition

MAJOR ACTION STEPS AND TIMELINE OF UNPLANNED TRANSITION X

(Note that the goal is to get back to the place of implementing the majority of the planned activities. This is stabilization space only.)

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- Definitions of unplanned departure (*include procedures and conditions for risk management including securing assets*)
- Use of an interim (*example: current thinking of using internal vs external source*)
- Authority and/or guidance of interim executive (*short or long-term*)
- Additional communication steps for unplanned succession (*example: activating crisis communication plan, designated spokesperson, use of external resource*)

ADDITIONAL POSITIONS INCLUDED IN THIS PLAN X

PLAN APPROVED BY X

DATE OF APPROVAL.....X

REFERENCE MATERIALS.....X

- Current board roster and contact information
- Key staff roster and contact information
- Organization Bylaws
- Organization Policies and Procedures Manual
- Current executive contract (as applicable)

APPENDIX INCLUDED IN THIS PLAN X

- Current executive position profile
- Current executive “Need to Know” list/onboarding checklist
- Current strategic plan (core purpose, core values, long and short-term goals)
- Commitment to diversity, equity, and inclusion

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