# Nonprofit Succession Planning Steps

## Succession with Notice
- Dust Off and Update Succession Plan
  - If organization has one, update it and make it relevant for task at hand
- Board Preparation for Succession
  - Board develops its vision for future, does organizational planning, decides what they want in an Executive, and appoint a Succession Committee, Consultant?
- Develop Organization Profile
  - Board develops Executive job description and organizational profile to market the opportunity
- Search
  - Decide and implement methods of outreach and advertising, how long to post and who will receive applications
- Selection
  - Develop ranking criteria, rank applicants, put together interview team, prepare interview questions, interview top applicants, rank those interviewed, have second interviews for top 2-3 if necessary, check references, make selection, negotiate and offer the position
- Good Departure
  - Recognize, acknowledge and find ways to say thanks to your outgoing Executive
- On-Boarding, Introduction, and Training
  - Develop an orientation plan, meet key stakeholders, provide training where needed, establish review timeframes with the Board, and introduce new Executive to the community

## Emergency Succession
- Stabilize Organization
  - Assign Acting/Interim Executive, use 2nd in charge, consider TA or consultant
- Board Preparation for Succession
  - Board develop its vision for future, does organizational planning, decides what they want in an Executive, and appoint a Succession Committee
- Develop Organization Profile
  - Board develops Executive job description and organizational profile to market the opportunity
- Search
  - Decide and implement methods of outreach and advertising, how long to post, and who will receive applications
- Selection
  - Develop ranking criteria, rank applicants, put together interview team, prepare interview questions, interview top applicants, rank those interviewed, have second interviews for top 2-3 if necessary, check references, make selection, negotiate and offer the position
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