

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



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