

A Leadership Transition Checklist

One of the key responsibilities of all board is ensuring that in the event of an expected or unexpected leadership transition – the organization is prepared.

Following are some key documents and processes nonprofits should have in place in order to manage a leadership transition successfully:

Documents

- An up-to-date strategic plan, with clear annual goals, including goals for leadership development within the organization
- An up-to-date job description of the Executive Director position
- Up -to-Date operations manuals for key administrative systems
- A sample work-plan for the Executive Director
- Documentation of key staff responsibilities and activities
- Documents which indicate how and where the financial records are kept
- Copies of any Board Self-Evaluations which have taken place

Processes to Have in Place

- Written processes for regular Executive Director and board evaluations
- Yearly management and staff evaluations and a secure place for personnel files
- A process for ensuring lists of contact information for key external relationships (donors, funders, corporate partners, etc.) is available to board and staff
- Documentation of any pending grants or significant financial transactions

An emergency plan which identifies who will be in charge during an unexpected situation, how financial duties will be handled and a communication plan for informing board, staff and key constituents

