Succession Planning Activities Checklist

blue avocado

Practical, provocative, food for thought for nonprofits

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1. Risk Prevention

- [ ] Create a list of the key supporters (donors, funders, regulatory bodies) for your organization to facilitate quick communication when needed
- [ ] Create a list of community stakeholder and planning groups as well as a list of who regularly attends and who covers when needed
- [ ] Develop an annual calendar of routine agenda items for board & committee meetings
- [ ] Develop an annual calendar of routine agenda items for organization leadership teams

2. Emergency Plan

- [ ] Create an emergency succession plan that is annually reviewed
- [ ] Create a board policy on delegation of authority and standing appointments
- [ ] Start a list of your compliance and regulatory requirements
- [ ] Make sure there is more than one signer at your banking institutions

3. Regular Conversations

- [ ] Identify the annual routine process to embed succession planning conversations
- [ ] Adopt a plan format and move forward

4. Leader Development

- [ ] Create a temporary staffing strategy
- [ ] Maintain networks of viable leaders

5. Legacy Planning

- [ ] Leaders can complete a legacy statement