

# 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:

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## 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

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## 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

