

SUCCESSION PLANNING TIPS

Plan Pro-Actively

1. *Evaluate the age of your coalition or project members.* Many Baby Boomers are retiring, so preemptively looking for those in leadership roles that may be leaving can help you plan—especially if more than one member retires at once.
2. *Assess which individuals will make the organization/coalition most vulnerable if they leave and develop contingency plans* specifically around them.
3. *Create a handbook of all your coalition's or project's knowledge* that is easily accessible to anyone in the organization, so information doesn't get lost from one role to the next, and *create a document of FAQ, Frequently Asked Questions,* ahead of time to give out to members during a succession.
4. *Facilitate a mentorship program between your executive director, board, volunteers, and members.* This can help nurture members into board members and board members into leaders.

Supporting Leaders during Transitions

1. To help a new leader, *compile a list of all personal/professional connections that the project or coalition has and what information/projects they're experts in.* This will help the new leader know who to contact when executing projects.
2. *Bring the new leader in for a training day with the current leader a month prior to the transition.* Have a new leader start early so there's an overlap between roles.
3. *Have an "emergency" contact that a new leader can call any time with any question (some boards call theirs, "Succession Planning 911"). Keep the old leader on call as an adviser.*
4. *New leaders should re-establish relationships with all the past leader's connections by calling/emailing them and introducing him/herself. Better yet, have the past leader reach out and introduce the new leader him/herself.*
5. *Audit the leadership role by creating a tally of every task the last past leader does.* Often a leader will take on more responsibility than they can handle. If possible, divert some of this work to the board or volunteers so the new leader can focus on the vision and direction of the organization instead of the administrative work.
6. *Ensure that the organization has a very clear vision, so that objectives don't drastically sway from one leader to the next.*
7. *Develop a culture of shared information among the board/coalition so that information doesn't leave with the last leader.* You may wish to store documents new leaders may need in a shareable folder so anyone can easily gain access.