

<<Your Organization>>:
Leadership Succession Plan Table of Contents
 <<Date>>

Definitions:.....

Scope of the plan

Approval/Adoption of Plan

CLARITY OF CULTURE

- Core purpose and Core values
- Long-term goals.....
- Commitment to diversity, equity, inclusion, justice.....
- Guiding Principles of transition /Philosophy of Hiring

CLARITY OF STRUCTURE

- Collaboration, Strategic Partnership, Merger options
- Organizational staff chart.....
- Overall understanding of the role of the CEO

ROLES TO IMPLEMENT THE PLAN.....

- Role of the current Executive in Planned Transitions
- Role of staff
- Role of the board.....
- Role of the board chair.....
- Role of transition committee --prepare-search-thrive.....
- Role of the transition chair.....
- External support
- Use of an interim

MAJOR ACTION STEPS AND TIMELINE OF PLANNED TRANSITION

- Approach to interested internal candidates (staff and board)
- Proposed Timeline Overview for Planned Transition.....

Communication Plan for Succession

- Example Communication Plan – Adjust priorities to meet your organization.....

High-level budget projections for transition.....

MAJOR ACTION STEPS AND TIMELINE OF UNPLANNED TRANSITION (Emergency).....

- Definitions of unplanned.....

- Opening framework
- Procedures and Conditions
- The Current Executive “Need to Know” List.....
- Authority Interim Executive
- Board Oversight of the Interim CEO.....
- Additional Communications steps for unplanned succession.....
- Completion of temporary emergency succession period

Additional positions included in this plan:

Plan Approved by board (Date):

Appendix included in this plan:.....

- The organizational chart
- Current executive position profile
- Current Board roster
- Current CEO succession plan or onboarding checklist