

Succession Departure List and/or Onboarding Checklist

Document Checklist

Here's a quick list of the essential documents that can be compiled during a succession plan or have ready for the arrival of a new executive director. If these documents are not already available, the board and new executive director should determine if they are needed and/or when and how the documents will be developed as appropriate.

General

- Lease, rental, mortgage agreements, as applicable
- Building information/management
- Insurance policies and contact information

Technology

- Technology inventory
- Web hosting vendor and contract
- Network administrator
- Computer passwords, as appropriate

Contact information

- Board roster and contact information
- Staff contact list
- Key mission partner contact list
- Current vendor contact list

Board

- Current board roster with terms, contact information
- Committee information

Nonprofit status documents

- Articles of incorporation and Bylaws
- IRS determination letter
- Minutes from recent board meetings
- Current 990

Planning Tools

- Annual priorities plan
- Strategic plan
- Long-range project calendar
- Emergency response and business continuity plan

Human Resources

- Employee manual (personnel policies)
- All key job or position descriptions (including executive)
- Employee orientation manual and process, if applicable
- Current staff priorities list
- Insurance policies

Financial Oversight and Compliance

- Administrative and financial policies manual
- Current fiscal year budget
- Current statement of financial position and activities
- Recent audit information, if applicable
- Liability and other insurance policies
- Sales or property tax exemption paperwork
- Banking information
- Accounting software access or contact information

Fundraising

- Current funding matrix for payment schedule, key dates, and reporting deadlines
- List of up to the top 50 donors by both size and longevity, if funder database is not available
- Fundraising plan
- Recent/pending proposals
- Most recent annual report, if applicable

- Current grant agreements
- Donor database access or designee within the organization

Communications

- Stakeholder survey results, if applicable
- Key collaborators and other partners list beyond donors (see above)
- Communications/community outreach plan, including positioning statement
- Organizational brand/style guide
- Advocacy plan, if applicable
- Public policy matrix, if applicable

Additional Transition Related Documents

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