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Affiliation Assessment

Financial status	Yes	No
Would a merger strengthen your financial position?		
Have you lost major contracts or grants?		
Would affiliation help you attract major contracts, grants or donors?		
Leadership	Yes	No
Would affiliation strengthen your organizational leadership?		
Would affiliation help you attract new board or staff talent?		
Is your board able to achieve consensus through healthy debate?		
Perceptions	Yes	No
Are there organizations with whom you are often confused? Or organizations confused with you?		
Have funders suggested affiliation?		
Employees	Yes	No
Are you able to provide upward mobility for staff?		
Is morale low or turnover high?		
Culture	Yes	No
Has your organization successfully taken risks in the past?		
Does your organizational culture embrace change?		

Recommended Succession Planning Steps

Recommended Succession Planning Steps	Inventory C = complete P = Partial
Define departure types	
Define transition roles and responsibilities	
Define transition notification protocol	
Complete the CEO Checklist – inventory of information and back up documentation <i>update annually</i>	
Conduct a brief organizational assessment	
Conduct a brief affiliation assessment	
Develop a plan to prepare staff for transition	
List the organization’s goals <i>update annually</i>	
Update the CEO job description – unique to your organization <i>update annually</i>	
Plan to ensure your legal compliance	
Set the parameters around a communications plan	
Agree on the transition process and timeline	
Agree on interim leadership preferences	
Agree on preferred candidate sources for the search	
Agree on search roles and process	
Agree on the management and assessment of internal candidates for the search	
Develop or find tools you will use during the search: Job Posting, Job Description, Interview Guide, CEO contract	
Agree on an onboarding / re-entry plan	
Plan on evaluating the new CEO – who, when, with what criteria	
Plan for staff cross training and potential staff transitions	
Create a budget for transition costs	
Define severance terms: pay, limits, amounts	
Ensure the strategic plan is current	

Sample from the CEO Checklist: Information Technology

INFORMATION	LOCATION/MANAGEMENT	CHECKED BY	DATE CHECKED
Network Administrator			
Web hosting: Vendor and contract			
Email hosting: Vendor and contract			
Cloud software (e.g. Office 365, Dropbox, QuickBooks, eTapestry, backup): contract, password location			
Mobile devices issued to staff or BYOD policies			
Data access policies			
Support contracts: vendor and contract			
Technology plan			
Inventory of hardware, software and other devices			

Go to www.ClarityTransitions.net to purchase the complete Toolkit