SUCCESSION AND TRANSITION PLANNING

THE LEADERSHIP TRANSITION AND BEYOND.....
IT BEGINS....

- Informing Staff, Community Partners and Stakeholders
- Working with the outgoing Executive Director/CEO
- Becoming Acclimated to Processes, Systems and Programs
ONCE THE TRANSITION OCCURS....

• First 90 days

Building a Bridge

- Connect with staff
- Connect with the constituents; the community
- Learn Key Staff leadership styles, goals and plans
- Review funding source requirements, expectations and mandates
- Observe, observe, observe!
• 3 months-6 months
  **Assessing the Situation**
  - Assess all current plans, processes and systems
  - Determine your role in the scheme of things
  - Engage the Staff, Board, Community and other Stakeholders
  - Focus on What is Important
  - Observe, observe, observe!
6 months to 12 months

Prioritizing for Success
- Evaluate community strengths, needs, challenges and opportunities
- Evaluate agency strengths, needs, challenges and opportunities
- Evaluate staff strengths, needs, challenges and opportunities
- Observe, observe, observe!
After the First Year
Strategizing for Maximum Impact

- Now that you have a determination of community, agency and staff needs, how do you move forward?
- What strategies are necessary to ensure compliance, attainment of goals and sustainability?