



Nonprofit Executive Succession-Planning Toolkit

July 08, 2018

This toolkit provides a resource for nonprofit boards of directors and executive leaders to develop an effective succession plan tailored to their organization's needs.

Nonprofit Executive Succession-Planning Toolkit

FEDERAL RESERVE BANK *of* KANSAS CITY
DENVER • OKLAHOMA CITY • OMAHA



Succession planning is a critical activity for nonprofit organizations. An organization that is prepared for the departure of an executive is better positioned for continued operations and future success. However, only 27 percent of nonprofits report having a written succession plan according to a survey by BoardSource.

The toolkit provides nonprofit boards, executives and staff with:

- An overview of the succession-planning process
- An outline of key planning roles, timelines and organizational readiness questions
- Templates that organizations may tailor to their specific needs
- Links that easily direct users to related templates and resources

All organizations, from those just beginning the planning process to those that are looking to review and update their plans, will find this toolkit relevant and accessible. The tools may be adapted by organizations based on their needs, expertise,

resources and strategic plans.

The [Nonprofit Executive Succession-Planning Toolkit](#) includes the following tools:

- [Emergency Succession Planning Tools](#)
- [Departure-Defined Succession Planning Tool](#)
- [Executive Self-Reflection Questions](#)
- [Executive Sample Job Description](#)
- [Important Competencies](#)
- [Board Membership Matrix](#)

For additional information about the Nonprofit Executive Succession-Planning Toolkit and other Federal Reserve resources to support nonprofit excellence, contact [Steven Shepelwich](#).
