Agenda

- What is transition planning?
- Creating the Conditions for Successful Leadership Transition
- Steps to transition planning
- Transition Dangers
- Key takeaway
- Q & A
A strong nonprofit leader is critical to the success of organizations, its ability to continue providing uninterrupted services to the community and for long term sustainability.

Nonprofit Executive Succession-Planning Toolkit, Federal Reserve Bank of Kansas City
What is transition planning?

Any type of formal rules or procedures in arranging for managerial succession.
Creating the Conditions for Successful Leadership Transition

- Strong Leadership: board and staff
- Documented processes and procedures, association knowledge, program plans
- Current Strategic Plan
- Well-defined roles and responsibilities
- Shared knowledge and relationships
- Functioning information systems
- Knowledge of association’s capacity
Steps to transition planning

Figure out what you most need to learn, from whom, and how you can best learn it.
Develop and communicate a compelling vision for what the organization will become.

Outline a clear strategy for achieving that vision.
Identify a few vital goals and pursue them relentlessly.

Think about what you need to have accomplished by the end of year 1 in the new position.
Evaluate the team you inherited. Move deftly to make the necessary changes; find the optimal balance between bringing in outside talent and elevating high potentials within the organization.
Think through how you plan to “arrive” in the new role. Find ways to build personal credibility and energize the volunteers.
Transition Dangers

- Loss of organizational knowledge
- Loss of leader viewed as loss of association
- Confusion about what to do and who should do it
- Poor choice of new leader
- Outgoing leaders won’t let go

- - New leader doomed to fail
Key takeaway

Communication is key to a successful transition.
Questions & Answers
Resources

Preparing for Leadership Transition

The First 90 Days – Michael D. Watkins
Thank you!

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