



TOOL KIT #5 SUCCESSION PLANNING

Resource List

This Resource List for Tool Kit #5 includes great web-based and PDF handouts on each of the three topic areas (Executive Director Succession Planning, Emergency Planning, and Board member Succession Planning) that comprise this Tool Kit.

The Resource List includes resources that you can use selectively to meet the professional development time available and the specific needs of your own Parent Centers. Here are several ways to use the Resource List:

- Identify resources to use during the Dialogue Guide discussion.
- Provide hard copies of 1 or 2 resources from the Resource List that really speak to you for your Parent Center.
- Provide a copy of this whole Resource List as a “take home” for later study by Board members.

All PDF handouts on the Resource List will be made available in a central repository for Boards and Directors to access. The Development Team has secured approval for reprinting all resources on the List, including those with copyrights.

Topic Area	Resource	Description	File Name Or Web Link	Source
ED SUCCESSION PLANNING	Building Leadership Organizations: Succession Planning for nonprofits	Offers a framework for creating a succession plan for a nonprofit.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_1_Building-Leaderful-Organizations-Succession-Planning.pdf	The Annie E. Casey Foundation
	When to Hire an Interim Executive Director	A brief overview of issues related to making short term decisions related to an interim ED.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_2_When-to-hire-an-interim-ED.pdf	Region 3 PTAC
	Communicating a Planned CEO Transition	A brief overview of important areas of concern regarding CEO transitions	https://regioncptac.org/wp-content/uploads/2023/01/TK5_3_Communicating-PlannedCEO-Transition.pdf	BoardSource
	Exit Planning for Retiring CEOs	A brief explanation of steps to the development of an effective exit strategy for a CEO	https://regioncptac.org/wp-content/uploads/2023/01/TK5_4_Exit-Planning-Retiring-CEO.pdf	BoardSource
	Leader Development & Emergency Succession Planning Workbook	A workbook that offers guidance in better understanding leadership development and succession planning	https://regioncptac.org/wp-content/uploads/2023/01/TK5_5_Workbook-Emergency-Succession-Planning_0.pdf	JHL Associates Training Consultants

TOPIC AREA	Resource	Description	File Name OR WEB LINK	Source
EMERGENCY PLANNING	Sample for an Emergency Succession Plan	A template for developing an organizational policy regarding emergency succession planning.	https://regioncptac.org/document/emergency-succession-plan-template/	The Center for Nonprofit Advancement
	The Evolution of Executive Transition and Allied Practices	An explanation of the practice of executive transition aimed at positioning organizations for leadership succession and long-term mission impact.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_7_Executivetransitionreport.pdf	CompassPoint
	Nonprofit Executive Succession-Planning Toolkit	A broad ranging booklet that covers the tools that a nonprofit will need to effectively implement a succession plan.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_8_Nonprofit-Executive-Succession-Planning-Toolkit.pdf	Federal Reserve Bank of Kansas City
	Emergency Succession Readiness Checklist	Offers a checklist of considerations as well as a template for plan when facing a sudden transition in leadership.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_9_Succession-Readiness-Checklist.pdf	Communities in School
BOARD SUCCESSION PLANNING	Staying Engaged, Stepping up	A guide to assessing and preparing for Board leadership change.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_10_AECF-SteppingUpStayingEngaged-2006-Full.pdf	The Annie E. Casey Foundation
	Succession Planning for the Nonprofit Board Chair	A brief exploration of the steps that a Board can do to facilitate the preparation and succession of leadership.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_11_Succession-Planning-2012.pdf_0.pdf	Social Venture Partners
	Governing for diverse communities	National study results underpin benefits and strategies for building a diverse Board.	https://regioncptac.org/wp-content/uploads/2023/01/TK5_12_Governing-for-Diverse-Communities.pdf	Trustee Workbook 3

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