



Executive
Transition
initiative



Greater Milwaukee
Foundation

ETI Overview of Succession Planning

2008



Executive Transition initiative

Welcome . . .

Most nonprofit organizations today are concerned about sustainability. One of the most effective ways to ensure the organizational sustainability is to engage in leadership succession planning. Leadership succession planning is an ongoing and thoughtful process that is integrated into the organization's overall strategic planning processes.

The Executive Transition Initiative would like to thank *The Brico Fund, the Bob and Linda Davis Family Fund and the Nonprofit Management Fund* for funding the development of this toolkit. We are grateful for your commitment to sustaining excellence in non profit leadership in Milwaukee!

For nonprofit organizations, there are three main types of succession planning: 1) Emergency, 2) Strategic Leadership Development and 3) Departure Defined.

Succession planning practices are an indicator of a healthy nonprofit organization, and a strategy that funders are increasingly looking

for in the organizations they support. Just like effective fund development and sound fiscal practices, succession planning can be brought into an organization's practices immediately

Succession planning development and implementation cannot be accomplished alone. They are a shared responsibility that requires a strong partnership, built on trust, between the Executive Director, the staff and the board of directors.

The purpose of this **Succession Planning Practices Overview** is to provide you with a roadmap through the different types of succession planning and to help you to determine which type(s) are applicable to where your organization is in its life cycle.

It is important to note that every organization has its own unique leaders, culture and needs. Therefore, we encourage you to use the information that best suits your organization, and to adapt the tools to address your specific organizational culture. We have done our best to summarize the current best practices, and you will also find references to articles and resources that are available on the web.

We welcome your feedback on this Overview, and we encourage your suggestions on additional planning tools and templates that may be helpful. Whether your leadership succession is on the horizon or just around the corner, we hope you will avail yourself of all the resources available.

Congratulations on your commitment to sustaining your service to our communities.

Mindy Lubar Price
ETI Project Manager

Overview of Leadership Succession Planning Practices:

When you think about succession planning, you might imagine some nebulous process that happens in board rooms of big corporations. In the for profit world, succession planning has traditionally focused on grooming a successor or heir apparent. Succession planning in the nonprofit world is a different matter.

It is no surprise that most nonprofit organizations do not have a succession plan in place. In nonprofits, planning for organizational growth and sustainability often takes a back seat to efforts to serving your constituents or influence social change.

The Case for Succession Planning:

In the fall of 2004, a survey on nonprofit executives in the four county, greater Milwaukee area uncovered startling findings about executive leadership turnover in the next five years. The study was sponsored by the **Greater Milwaukee Foundation**, in partnership with the **Donors Forum of Wisconsin**, the **Helen Bader School of Social Welfare**, and the **University of Wisconsin Milwaukee** in collaboration with the **Annie E. Casey Foundation**.

More than 350 nonprofit executives responded to the survey. Results highlighted the need to address leadership transition issues among nonprofits:

Succession Planning:

- 66% of nonprofits surveyed were likely to experience an executive transition within the next five years, and 26% of those in the next two years.
- Only 1-2% of nonprofits reported having a succession plan in place.
- Organizations with founding executives were even less likely to have a plan in place.

Executive Demographics:

- 55% of the current nonprofit executives were over 50 years old.
- 84% of responding executives were white, 11% African American and 1.4% Hispanic/Latino.
- Only 33% of responding organizations had a deputy director.

What is Succession Planning? Leadership succession planning is an ongoing practice focused on defining an organization's strategic vision, identifying the leadership and managerial skills necessary to carry out that vision, and recruiting, developing and retaining individuals who have or who can develop those skills. Succession planning will include the following three components:



- **Emergency Succession Planning** – A plan to address an unanticipated departure of an Executive Director, usually occurring with only a few days or weeks notice. Emergency succession plans ensure the uninterrupted performance of essential executive functions by outlining steps for the temporary appointment of an acting Executive Director.
- **Strategic Leadership Development** – An ongoing process that identifies the core competencies, skills and knowledge needed by the organization in the next five years along with a plan to develop those competencies in your existing talent or to recruit new talent.
- **Departure Defined Transition Planning** – A course of action that boards and executives employ when an executive begins thinking about leaving an organization. The process focuses on communicating the transition to staff and stakeholders, conducting an organizational assessment, recruiting a new executive, and celebrating the transition.

Assess Your Organizational Risk:

More often than not, nonprofit executives and boards avoid discussion about succession planning. Executives fear that opening up discussion will raise red flags. Board members fear that raising the topic will somehow hurt or damage their relationship with an executive. Avoidance is often greatest when a founding executive is leaving the organization.

Unfortunately, the nonprofit world is becoming increasingly competitive in the face of duplication of services, dwindling resources and a narrow talent pool. To help you get a sense of your organization’s risk level, take the following assessment developed by **Transition Guides**, a nationally recognized consulting firm that specializes in providing consulting services to nonprofits during leadership transitions.

“There is no doubt that nonprofit organizations are only as effective as their leadership at the top. It is critical, therefore, that they be prepared to move quickly should the Executive Director become incapacitated or unable to continue in that position for whatever reason. This requires some deliberate and strategic thinking well in advance to assure uninterrupted leadership.”

Jim Marks
 Program Officer
 Greater Milwaukee Foundation

“It is CRITICAL that the new Executive, and all of the organizations internal and external constituents, are given adequate time and resources to get to know and adjust to each other. Senior staff and the Board President are essential elements in the future success of the new Executive. They too must devote time and energy to making a successful transition. Without proper handling, a new Search Committee, will most likely be in the not too distant future!”

Elliot Lubar
 Nonprofit Management Consultant
 Milwaukee

Succession Planning Risk Assessment:	Yes	No
1. Our organization has a strategic plan.	<input type="checkbox"/>	<input type="checkbox"/>
2. Our strategic plan includes sections on leadership and/or human capital development.	<input type="checkbox"/>	<input type="checkbox"/>
3. Our organization has a written emergency succession plan.	<input type="checkbox"/>	<input type="checkbox"/>
4. Our budget designates more than one percent of revenues for staff and board development.	<input type="checkbox"/>	<input type="checkbox"/>
5. Our executive has been in his or her position fewer than seven years.	<input type="checkbox"/>	<input type="checkbox"/>
6. Our Executive Director has said either formally or informally that he/she plans to stay with the organization for four or more years.	<input type="checkbox"/>	<input type="checkbox"/>
7. Our executive shares responsibility for fundraising or the relationships needed for fundraising with other staff and board members.	<input type="checkbox"/>	<input type="checkbox"/>
8. Our board chair has served less than five consecutive years.	<input type="checkbox"/>	<input type="checkbox"/>
9. Our board has well-defined term limits.	<input type="checkbox"/>	<input type="checkbox"/>
10. Most of our board members have served fewer than six years.	<input type="checkbox"/>	<input type="checkbox"/>
11. Our board represents a level of economic, cultural, and/or racial diversity appropriate to our mission and/or found in our community.	<input type="checkbox"/>	<input type="checkbox"/>
12. Our board has a committee or designated group responsible for identifying, recruiting, and supporting new board members.	<input type="checkbox"/>	<input type="checkbox"/>

Reviewing Your Results: Answering “no” to four or more questions places your organization at risk for disruption in the event of an unanticipated leadership departure. Organizations that answer no to six or more questions should move without haste to introduce succession planning strategies into the organization.

Emergency Leadership Succession Planning:

An emergency succession plan prepares the organization for an unexpected transition. Unplanned departures can occur for a variety of reasons, including illness, disability, death, or termination. Because of this, emergency succession plans should include contingencies for:

- Short term unplanned absence – typically less than 3 months.
- Long-term unplanned absence – typically more than 3 months.
- Permanent unplanned absence.

Steps in Creating an Emergency Succession Plan:

1. Establish An Emergency Leadership Transition Activation Team.

The first priority an unplanned executive departure is to make sure organization operations and services continue uninterrupted. One approach is to create an Emergency Leadership Transition Activation Team.

The role of the emergency leadership transition team is to implement the plan and ensure short-term continuation of organizational operations in the event of an unplanned executive departure. Team members selected should have a strong commitment to the organization and willingness to make an increased, albeit short-term investment of their time during the early phases of the emergency transition.

2. Clarify Board Responsibility.

Developing clear expectations about the roles and responsibilities of the board is a critical step in developing an emergency executive succession plan. A frank discussion between the executive and the board during the planning process should address the following questions:

- Who on the board will lead volunteer roles on the emergency succession plan team?
- Who on the board will take responsibility for communication to staff and stakeholders?
- Who on the board will lead a search for a consultant to support the transition process, if one is needed?

- How often will the board meet during the weeks and months following an unplanned departure?
- Who on the board will lead the executive search process?

These questions and others are included in the Emergency Succession Planning Toolkit.

3. Update Organization Contact Information.

Completing an operational inventory of important documents and contact information will ensure that the person who assumes temporary or permanent responsibility for the Executive Director (whether internal or external) has the basic information needed in order to ensure organization operations continue uninterrupted. A sample operations inventory is included in the Emergency Succession Planning Toolkit.

4. Review and Update Job Descriptions.

There is never a time when a job description is needed more than during an emergency succession. Ideally, job descriptions should be reviewed annually and should minimally include updates for everyone on the senior management team. Organizational charts should also be updated.

A brief audit of organization job descriptions will reveal whether they will fully address the organization's needs in the event of an unplanned executive transition. The Emergency Succession Planning Toolkit provides tools to assist you.

5. Assign Back-Ups for Executive Functions.

The best way to ensure that your organization is fully prepared for emergency executive vacancy is to identify one or more back-ups who have the skills to temporarily assume ED responsibilities (for up to 30 days) until an Acting Director or Interim Executive Director is named. Think creatively:

- Match staff members skills to specific executive functions.
- Can a board member with personnel experience step in and assist a senior supervisor with human resource issues?
- Can an administrative person temporarily coordinate vendor services?
- Can the board treasurer assist with fiscal oversight?

Whenever possible, emergency succession plans should name one or two possible back-ups for each ED function.

6. Cross-Train Management Staff.

Even the best developed succession plan will fail if staff does not have the skills, experience or capacity to temporarily assume additional responsibilities assigned to them. Cross training is a powerful strategy for increasing performance in any organization and it is an essential strategy to prepare for an unplanned departure.

7. Address The Impact of the Departure on Staff.

An area that is frequently overlooked is the impact that an executive's departure will have on staff milieu. This is especially true when an executive departs an organization due to death, disability, or termination. The potential fall-out is even greater with a long-term executive or founder.

How an organization responds in the first 12-36 hours is critical. Without a clear plan of action in place, organizations may not act quickly enough. That is why it is important to develop a critical incident response plan. The plan doesn't have to be complicated in order to be effective. The primary goal is to give employees as much information as possible, and provide them with a safe opportunity to process the impact the change will have on them. The Emergency Succession Planning Toolkit describes how to develop a plan.

8. Identify an Acting or Interim ED

Recruiting a new executive takes time. Some recruiters recommend that organizations plan for **between six to nine months** to complete the process. To support the ongoing stability of the organization, it is often necessary to identify an acting executive and/or an interim executive. There is a distinction between the two:

- **Acting ED:** An Acting ED is someone who is designated for a short period of time (typically defined by days or weeks) to assume the responsibilities of the ED. This role is usually assigned to a person inside the organization who has the skills and capacity to oversee day to day operations, make necessary decisions (in consultation with identified board

members) and manage communication immediately following a transition. An Acting ED may assume this role until an interim or new executive is hired.

- **Interim ED:** An Interim ED may be someone inside the organization, but not necessarily. Interim EDs are highly skilled managers who temporarily take the helm of an organization (up to nine months on average), help the board and staff address important systems and capacity issues, and lay the groundwork for the permanent leader's success. Typically, an Interim ED is someone who does not want the permanent job of the executive, but is interested in a short-term assignment.

The Emergency Succession Planning Toolkit includes strategies for identifying Acting EDs and recruiting interim EDs.

9. Develop a Communication Plan

Properly communicating to external stakeholders is one of the most delicate yet essential tasks in transition management. Recommendations:

- Determine who will act as the spokesperson for the organization regarding the transition.
- Be strategic about your communication. This means listening, speaking the truth, and helping stakeholders understand your actions.
- Be upfront with bad news. Some transitions are precipitated by an organizational crisis that involves the removal of an executive. If there is bad news to deliver, you want to be the one sharing it to your constituents.

10. Develop a Policy Statement.

The importance of developing a written emergency succession plan cannot be overstated. A written document serves to validate the thoughtful planning of an Executive Director and board. It also provides a tangible tool that can be referenced in the event of an unplanned departure. An emergency leadership transition policy statement template is included in the toolkits.

Strategic Leadership Development:

Strategic leadership development is a sound risk management practice that is critical to ensuring the viability of an organization. Organizations that focus on talent succession are more nimble and flexible in the face of an unanticipated leadership change, because they have the skills and capacity to fill leadership gaps.

Key Strategies to Strategic Leadership Development:

1. Establish an Ongoing Dialogue about Strategic Leadership Development.

The best time to discuss leadership transitions is when they aren't imminent. Creating a safe environment that supports ongoing discussion about succession and leadership development will reduce the trepidation that executives and board members feel about the topic. There are a variety of naturally occurring opportunities in a nonprofit organization to discuss leadership succession. Opportunities include:

- During the executive's annual performance review.
- During annual operational planning.
- As part of board strategic planning and visioning discussions.
- At regular board meetings.
- At annual budget meetings.
- During fund development planning.
- During your policy planning and review process.

2. Use a Strategic Plan to Assess Future Leadership Needs.

Just as with a departure defined transition, strategic planning is critical to developing your organization's bench strength. A carefully implemented strategic plan will yield a number of insights about current leadership gaps and future leadership needs. Based on the decisions made about the future direction of the organization, the board and executive can address questions such as:

- How do future opportunities for the organization impact on leadership needs?
- Where are the future leadership gaps? Will the organization need an innovator? Program

developer? Administrator? Fundraiser? Marketer?

- Is the Board developed to its full potential?
- Who are the natural internal leaders in the organization and how can we nurture them?

A future-focused discussion about internal leadership resources will provide a framework for discussion succession issues and inform future planning and activities. Several tools are included in the Strategic Leadership Development toolkit to guide you through this process.

3. Invest in Board and Staff Development.

Every Executive Director and board wants to cultivate the staff talent, but feel they don't have the time to do it. Investing in board and staff development is not an event, it's a process. And it doesn't have to be complicated or expensive. Here are some suggested ways that you can begin to invest in leadership development in your organization.

- Encourage staff to seek professional development training that emphasizes leadership and management skills.
- Encourage the Board to seek out education and development on Board governance and responsibility.
- Create occasions for key staff to interact with the board.
- Assign responsibilities to senior staff that will help them demonstrate their leadership skills.
- Mentor staff or connect them with external mentors who are familiar with the organization.
- Develop a profile of the board's leadership assets and characteristics.
- Cross train – one position at a time.
- Encourage the use of work teams.

Groom a successor?

Many executives mistakenly believe that succession planning means grooming a successor. While there are many advantages to grooming an heir apparent, there are also pitfalls. Succession planning in the nonprofit sector requires broader thinking that provides opportunity for leadership development at all levels of the organization

4. Establish an Annual Executive Evaluation.

According to the *Chronicle of Philanthropy* nonprofit organizations have been notably lax in

creating effective evaluation systems for their executives. A 2004 study conducted by **BoardStar** found that out of 225 nonprofit managers only 51 percent said they have received performance reviews during the past 12 months.

Lack of attention to formal evaluation of nonprofit executives places both Executive Directors and their organizations at risk. To avoid this problem, nonprofit executives and their boards should engage in an annual performance review process. The *Minnesota Council on Nonprofits* recommends that executive performance be measured in relation to the executive's job description. The evaluation should cover the following activity areas:

- Leadership
- Public relations
- Board relationships
- Fundraising
- Accountability
- Annual goals
- Fiscal Soundness
- Staff relations

See the Strategic Leadership Development Toolkit for tools to support this process.

5. Conduct Regular Board Self-Evaluation.

Succession planning provides a unique opportunity to evaluate leadership at all levels of the organization—and this includes the board. A comprehensive assessment will evaluate individual board member's knowledge about the nonprofit and their level of engagement.

According to *BoardSource*® a nonprofit resource firm dedicated to increasing the effectiveness of nonprofit organizations by strengthening their boards of directors, board self-assessment is too comprehensive a process to be carried out every year. However, they propose that performance assessment can be particularly useful just before the board engages in a strategic planning process or prepares for a major campaign, after a major crisis, or when complacency has set in and an invigorating push would be welcome. There are a number of excellent tools available through *BoardSource*® (www.boardsource.org) and other resources that can be used or adapted to address your unique organizational structure and needs. For a simple tool that can be easily implemented in your organization, see the **Sample Board Self Assessment Tool** included in the Strategic Leadership Development Toolkit.

6. Evaluate Employee Performance and Potential.

Some executives see annual performance reviews as time-consuming exercises that do not improve employee productivity or benefit the organization. But evaluating employee performance is at the very heart of succession planning. In order to build your organization's bench strength, it is necessary to define the core competencies needed for current job positions and to evaluate how well your current team members match the required competencies.

It is also important to assess staff capabilities to assume key leadership roles. Nonprofits provide fertile ground for young talent to sharpen their leadership skills. Executives can encourage young talent to identify interest areas and then tailor a skill development to their leadership interests.

7. Conduct Ongoing Staff Development and Recruitment.

Implementing a staff development and retention plan may seem overwhelming for small or medium sized nonprofits that do not have a human resource function. It doesn't have to be. Every nonprofit can implement a professional development and recruitment plan that includes a variety of activities to recruit new talent and encourage leadership development within the organization. Strategies that can be easily implemented in your organization include:

- Integrate professional development into your annual employee appraisal process.
- Offer internal in-services on leadership development.
- Broaden recruitment activities to include resources that reach diverse communities.
- Encourage staff participation in professional associations and community advisory committees.
- Make sure your organization is a member of your local young professionals association(s).
- Provide mentoring support by matching staff with internal and external leaders.

Departure Defined Transitions:

Departure defined transitions are anticipated departures of an executive. Departure defined transitions may take place over a period of up to eighteen months, or an even longer period.

Benefits of Implementing a Departure Defined Transition:

There are countless reasons to postpone planning for an executive transition. Executives may be reluctant or ambivalent about bringing up the uncomfortable topic of leaving. Board members may feel overwhelmed at the prospect of replacing a tenured or founding executive. A departure defined succession plan presents a unique opportunity for the executive and board to join together and implement a thoughtful, forward looking plan that honors the executive's legacy and prepares the organization for future growth and sustainability.

Ten Steps to a Departure Defined Transition:

1. Create a Process Committed to Good Endings and New Beginnings.

Creating a good ending for the departing executive is just as essential as creating a good beginning for the incoming executive. The decision to leave an organization is a difficult one for most executives. That is why it is so important to recognize and acknowledge the challenges that many departing leaders face during an executive transition. Forward thinking and frank discussion between the board and the departing executive can lead to a shared understanding about the executive's and the organization's needs and expectations.

2. Engage the Board.

Board leadership is essential during an executive transition. A departure defined transition is an opportunity for a board to have a significant, long-term impact on the organization. The board has the opportunity to create the "big picture" for the organization in the coming years and link the vision directly to short- and long-term goals through the hiring of a new executive.

3. Explore Hiring a Transition Consultant.

Whenever possible, organizations should consider hiring an executive search or transition consultant

to guide and support the transition committee in carrying out its responsibilities. Tips for hiring a consultant are included at the end of this summary.

4. Establish a Leadership Transition Team.

Appointing a leadership transition team has many benefits. First, it removes responsibility from the departing executive for leading the process of finding his or her eventual successor. Forming a transition team also provides an opportunity to bring people with diverse perspectives into the planning process. Group leadership also encourages shared ownership and a more equal division of responsibility.

The leadership succession planning team conducts the day to day activities required to implement a departure defined transition. However, in most settings they are not responsible for making hiring decisions as those decisions are made by the board. Roles and responsibilities of the team should be clearly outlined in writing. A list of responsibilities, and strategies to develop the team are included in the Departure Defined Toolkit.

5. Communicate the Transition to Stakeholders.

It is often said that it's not possible to over communicate in times of uncertainty. That is never more true than during an executive transition. Departure defined transitions present a unique opportunity to shine a spotlight on the strengths of an organization, engage the public in the organization's mission, and even attract new stakeholders. Recommendations include:

- Put your communication plan in writing.
- Narrow the communication band.
- Be mindful about the timing of communication.
- Use a variety of communication vehicles.
- Keep staff informed.
- Respect the confidentiality of candidates.

6. Conduct an Organizational Assessment to Identify Strengths and Vulnerabilities.

Leadership transitions may be precipitated by or be the cause of tremendous organizational disarray. It is important to use the leadership transition as an opportunity to step back and assess the organization's strengths, challenges, threats and opportunities. It is also an opportune time to

review the organization's mission, vision, core values, policies and operating procedures.

Implementing an audit will provide the board with invaluable information that can increase clarity in understanding about immediate and long term leadership priorities. The Departure Defined Toolkit includes several tools to support decision making about conducting an organizational audit.

7. Use a Strategic Plan to Assess Future Leadership Needs.

It is equally important to integrate your organization's strategic plan into your succession plan. If your organization does not have an updated vision statement and strategic plan, then now is the perfect time to develop one.

The reason for updating your strategic plan is simple. Without a strategic plan, how can you know what your future leadership needs will be? In

Organizations may question the timing of updating a strategic plan prior to the appointment of a new executive. But without a strategic plan, how can you know what your leadership needs will be?

the simplest terms, strategic planning results in a shared vision of what the organization will look like in the future. Only after you have a clear picture of where the organization is going can you fully understand what

skills will be required to lead the organization there.

8. Translate Assessment Results into a Leadership Succession Plan.

Results from the organizational assessment and strategic plan will yield valuable insights about current leadership gaps and future leadership needs, such as:

- Where are the leadership gaps? Will the organization need an innovator? Program developer? Administrator? Fundraiser? Marketer?
- Who are the natural internal leaders in the organization and how can we nurture them?
- Will the organization need an executive who will lead it in new directions or

someone who will maintain what has been built?

- What values must a future executive possess in order to lead the organization?

A future-focused discussion about internal leadership resources will inform future planning and activities.

9. Conduct an Executive Search.

Most search experts recommend a broad based approach focused on recruiting a diverse pool of candidates. If your organization has not retained a transition consultant or search firm, you will want to be as organized as possible. Key steps include:

- Creating a position description for the new executive.
- Deciding on the geographic scope.
- Identifying a point person.
- Developing a realistic budget and timeline.
- Developing an outreach campaign.
- Announcing the position.
- Screening potential candidates.
- Conducting in person interviews.
- Interviewing finalists and make a selection.
- Checking references and conducting background investigations.
- Negotiate the new executive's offer.

The Departure Defined Toolkit includes strategies and tools for implementing each of these steps.

10. Announce and Celebrate the Leadership Succession.

After an agreement has been approved, an announcement should be planned.

Recommendations:

- Give the incoming executive an appropriate amount of time to inform his or her current employer.
- Notify internal candidates in person prior to the announcement.
- Notify the senior management team in person prior to the announcement.
- Include the new and departing executive in the announcement ceremony.
- Send a press release.
- Notify stakeholders in person, by phone or in writing depending on their relationship with the organization.
- Ensure that an appropriate orientation plan is in place for the incoming executive.

Identify an appropriate way to honor the departing executive.

Seeking Help with Succession Planning:

Seeking outside assistance to implement succession planning is a wise move, especially for organizations with founding directors. An experienced consultant can benefit the process in a number of ways. Consultants can: (1) create a safe environment where the executive and board have permission to raise questions and concerns; (2) coordinate the planning process and hold parties accountable for their responsibilities; (3) conduct an impartial organizational assessment; and (4) oversee the executive search to ensure that a replacement executive is recruited in a timely manner. **If your organization doesn't have the financial resources to retain a consultant, you can implement many of the strategies described in the toolkits by activating a leadership transition team comprised of board members and stakeholders.**

Tips for Hiring a Consultant:

Qualities and experience to look for when seeking an outside consultant include:

- Nonprofit consulting—preferably organizational development work with multiple constituents.
- Reputation for completing projects on time and on budget.
- Knowledge about nonprofits in your community.
- Contacts with nonprofit Board of Directors—preferably several years membership or successful consulting history with one or more boards.
- Commitment to service in the nonprofit sector.
- An understanding that they are serving the organization and not the candidates.
- Desire to work in nonprofit organizations experiencing major challenges and changes.
- Eagerness to learn and teach.
- Commitment to quality in service to constituents.
- Desire to lead and to model leadership.
- Aptitude for rigorous recruitment work required in executive searches.
- Understanding of nonprofit management.

- Ease at relating to all stakeholder groups in a nonprofit setting.
- Strong group facilitation skills.
- Conflict resolution skills.
- Clear presentation ability verbally and in writing.
- Proficient at receiving and giving feedback.
- Solid boundaries about respecting confidentiality.
- Strong record keeping and time management skills.
- Transition consultants who have had previous experience as a nonprofit executive will bring that experience with them.

Acknowledgements:

The ETI succession planning toolkits would not have been possible without the insight and feedback of many nonprofit leaders who have shared their ideas, their experiences and even their personal stories in the spirit of contributing to the body of knowledge about nonprofit succession planning.

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Resources:

A complete listing of resources on executive transition management can be found in the toolkits or at the ETI website at:

http://www.greatermilwaukeefoundation.org/grant_seekers/eti.shtml.

Additional information can also be found through these consultants.

- CompassPoint Nonprofit Services at: www.compasspoint.org
- Leading Transitions at: www.leadingtransitions.com
- Nonprofit Management Fund at: nonprofitmanagementfund.org
- Transition Guides at: www.transitionguides.com
- Bridgestar at: www.bridgestar.com

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