Planning for the Future:

Executive Succession as Organizational Sustainability

A practical working session for nonprofit executives and board leaders

TODAY

What we will accomplish

1. Distinguish emergency succession, planned transition, and ongoing leadership development.
2. Assess the organizational foundation that makes leadership continuity possible.
3. Clarify the CEO/ED role, the board role, and the work they share.
4. Identify the essential elements of an emergency succession plan.
5. Understand the board-led process for a planned executive transition.
6. Leave with three concrete actions to strengthen succession readiness.

FROM YOUR PRE-SESSION SURVEY

You designed today's agenda

Where do we start?

Practical first steps and a clear path forward.

What does a good plan contain?

Templates, checklists and the "must-haves."

Who owns what — CEO or board?

Decision rights, partnership and governance boundaries.

How do we build the bench?

Delegation, cross-training and leader development.

How do we manage a planned transition well?

Founder/long-tenured transitions, communications and handoff.

Today is built to answer those questions — and give you tools you can use when you leave the room.

5 MINUTES

Table opener: What happens tomorrow?

Imagine your ED/CEO unexpectedly cannot come to work tomorrow — and will not return for 90 days. They are not available by phone or text.

At your table: introduce yourself, then name the first THREE things your organization would need to figure out. Don’t sugarcoat...be honest in your assessment of knowledge, empowerment, access, competence and collaboration!

Listen for: authority • access • communication • relationships • priorities

Succession planning is not an exit plan

It is a continuity strategy.

The goal is not to make a leader replaceable. The goal is to make the organization resilient enough to keep advancing its mission through leadership change.

MISSION CONTINUES → PEOPLE KNOW WHAT MATTERS → LEADERSHIP CAN CHANGE

BoardSource and National Council of Nonprofits frame succession planning as a sustainability / risk-management practice.

THE FOUNDATION

Healthy planning is business continuity

MISSION + VISION	STRATEGIC PLAN	ANNUAL PLAN	KPIs + DASHBOARD	CLEAR ROLES	DOCUMENTATIO N
Why we exist	Where we are going	What happens this year	How we know	Who owns what	How work continues

When these systems are strong, staff, board and volunteers can keep moving even when one person is unavailable.

Federal Reserve Bank of Kansas City toolkit: strategic direction, leadership requirements, staff development, shared stakeholder relationships and documented systems.

KNOW WHAT YOU ARE SOLVING FOR

Three lanes — three different jobs

1 Emergency Succession

Unexpected absence or departure.

Goal: Keep the wheels on the bus.

Focus: interim authority, critical operations, access, communication, board oversight and staff security.

2 Planned Transition

Known retirement or permanent departure.

Goal: prepare the organization and select the leadership needed for what comes next.

Focus: readiness, future needs, search, handoff and onboarding.

3 Leader Development

Ongoing — whether anyone is leaving or not.

Goal: build capacity and reduce dependence on one person.

Focus: delegation, cross-training, development and shared relationships.

Federal Reserve Bank of Kansas City, Nonprofit Executive Succession-Planning Toolkit.

The “single point of failure” test

If only ONE person knows it, owns it, can access it, or holds the relationship…

…it is a succession vulnerability.

Banking / approvals	Major donor relationships	Passwords / systems
Key contracts / grants	Program knowledge	Community relationships

10 MINUTES

Table activity #1: How ready are we?

Choose ONE organization at your table and assess it quickly.

- ☐ Do we have a current strategic plan and annual operating priorities?
- ☐ Are key external relationships shared beyond the CEO?
- ☐ Do we have staff who are being intentionally developed?
- ☐ Could someone find the CEO's critical information tomorrow?
- ☐ Are executive responsibilities and decision authorities documented?
- ☐ Does the board know what it would do in the first 48 hours?

Debrief: What is your organization's biggest continuity strength? Biggest vulnerability?

Succession is a partnership — with different decision rights

COLLABORATE ON READINESS

Strategy • risk • leadership needs

BOARD GOVERNS THE CEO ROLE

Hire • evaluate • compensate • transition

CEO LEADS THE ORGANIZATION

Operations • people • systems • development

The partnership is strongest when everyone knows which hat they are wearing.

Federal Reserve Bank of Kansas City toolkit; BoardSource board–staff partnership and executive transition guidance.

Who leads what?

CEO / ED LEADS	SHARED WORK	BOARD LEADS
• Document current responsibilities • Keep job descriptions current • Build and develop staff capacity • Cross-train critical functions • Maintain accessible systems / records • Draft emergency continuity information	• Assess organizational readiness • Identify future leadership needs • Protect key stakeholder relationships • Plan transition communications • Review the plan regularly • Align succession with strategy	• Approve succession policy / plan • Appoint transition/search committee • Select and supervise interim CEO • Define next-CEO profile • Set search process + compensation • Select, hire and onboard CEO

The Fed toolkit assigns a lead board role in developing/approving plans and an executive role in drafting emergency plans and developing staff. BoardSource places CEO selection with the board.

One boundary deserves to be crystal clear

The outgoing CEO helps prepare the organization for transition.

The BOARD selects the next CEO.

Input can be valuable. Decision authority is different.

BoardSource: the outgoing executive is included in succession planning, but BoardSource does not recommend including the outgoing CEO in hiring the successor.

10 MINUTES

Table activity #2: Who owns it?

At your table, label each decision: CEO • SHARED • BOARD

Identify backups for critical staff functions	Decide internal-only vs. external search
Update the CEO job description	Identify donor relationships to transfer
Select the interim CEO	Set interim authority + compensation
Define competencies for the next CEO	Select the permanent CEO

Where did your table disagree? Those disagreements are where role clarity matters most.

Emergency succession: Keep the wheels on the bus

An emergency plan is designed to be ACTIVATED — not debated.

1 INTERIM LEADERSHIP

Who steps in? Who is backup?

2 AUTHORITY + ACCESS

What can they decide? What can they access?

3 COMMUNICATION

Who tells staff, board, funders and partners?

4 BOARD OVERSIGHT

Who supervises and supports the interim?

Fed toolkit emergency plan; BoardSource emergency plan emphasizes communications, financial oversight, interim management and executive search.

BUILD IT BEFORE YOU NEED IT

Emergency plan: the minimum viable checklist

- ✓ Named interim + at least one backup
- ✓ Interim responsibilities and limits of authority
- ✓ Board supervision / support structure
- ✓ Critical passwords, accounts, records and signatories
- ✓ Payroll, banking, grants, contracts and deadlines
- ✓ Internal + external communication protocol
- ✓ Current key stakeholder contact list
- ✓ Cross-training for critical functions
- ✓ Trigger for permanent search / return-to-role decision
- ✓ Location of plan + who holds copies

Simple. Current. Accessible. Approved.

MORE NOTICE = MORE STRATEGIC CHOICES

Planned transition is a different process

1	2	3	4	5	6
FUTURE	**READINESS**	**PROFILE**	**SEARCH**	**HANDOFF**	**ONBOARD**
Where is the organization going?	What must be stronger before transition?	What leadership does the future require?	How will the board identify and select?	What knowledge + relationships transfer? How will this be done?	How will the board set the new CEO up to succeed?

Strategy → organizational readiness → leadership profile → search

Fed toolkit departure-defined timeline; BoardSource executive transition guidance.

THE STRATEGIC QUESTION

Do not automatically replace the person who is leaving

The job you hired for 10 years ago may not be the job the organization needs next.

What will our strategy require in the next 3–5 years?

What should remain true — and what needs to change?

Which CEO responsibilities should move elsewhere?

What competencies, lived experience and leadership style will the future require?

Fed toolkit ties executive requirements to strategic objectives; BoardSource recommends an organizational assessment before defining the next leader.

The departing leader has two jobs

1 PREPARE THE ORGANIZATION

- ✓ Document critical knowledge
- ✓ Transfer key relationships
- ✓ Develop staff and delegate
- ✓ Surface risks honestly
- ✓ Support communication
- ✓ Honor agreed transition boundaries

2 PREPARE TO LET GO

- ✓ Clarify departure timing
- ✓ Separate identity from role
- ✓ Avoid pre-selecting a successor
- ✓ Support the board’s process
- ✓ Define any post-exit role in advance
- ✓ Create space for new leadership

A strong legacy is an organization that doesn’t just survive after you leave…it thrives.

Build the bench before you need the bench

Succession planning is also talent development.

DELEGATE	Move meaningful responsibility — not just tasks.
CROSS-TRAIN	Ensure critical work has more than one capable owner.
DEVELOP	Use stretch assignments, coaching and mentoring.
SHARE RELATIONSHIPS	Connect staff + board to donors, partners and community leaders.
MEASURE	Tie development to strategic and operational goals.

Fed toolkit Strategic Leader Development Planning; National Council of Nonprofits recommends cross-training and leadership development.

A TRANSITION TESTS GOVERNANCE

Your board must be succession-ready, too

1. Can the board act quickly without overstepping into management?
2. Does the chair understand the CEO supervisory role?
3. Is there a committee structure ready to support transition?
4. Can the board define future leadership needs from strategy — not personality?
5. Does the board have the discipline to support the interim and new CEO without micromanaging?

Succession planning is also a board-development exercise.

TAKE THIS BACK TO YOUR BOARD

The Federal Reserve toolkit: your working guide

NONPROFIT EXECUTIVE SUCCESSION-PLANNING TOOLKIT

Federal Reserve Bank of Kansas City

OPEN TOOLKIT

- ✓ Readiness questions
- ✓ Emergency plan + 12-week timeline
- ✓ Departure-defined plan + timeline
- ✓ Executive self-reflection
- ✓ Sample CEO job description
- ✓ Leadership competencies
- ✓ Board membership matrix

Use the framework. Customize the details. Keep it current.

CONTINUE THE WORK

Resources worth bookmarking

Federal Reserve Bank of Kansas City	Nonprofit Executive Succession-Planning Toolkit ↗
BoardSource	Executive Transition & Succession Planning ↗
BoardSource	Emergency Leadership Transition Plan ↗
BoardSource	Executive Transition Timeline ↗
National Council of Nonprofits	Succession Planning / Managing Leadership Transitions ↗

Tip: Put succession planning on the board calendar before there is a vacancy.

10 MINUTES

Action planning: Stop • Build • Start

STOP THE BLEEDING

What immediate vulnerability needs attention?

What could interrupt work tomorrow?

____

____

BUILD THE FOUNDATION

What organizational system needs strengthening?

Strategy? KPIs? Documentation? Coss-training?

____

____

START THE CONVERSATION

What succession conversation needs to happen next?

With whom — and by when?

____

____

Work individually first. Then share ONE commitment with a partner.

MAKE IT REAL

Your next 90 days

ACTION 1 ______________________________

Owner: ____________________ By when: ____________________

ACTION 2 ______________________________

Owner: ____________________ By when: ____________________

ACTION 3 ______________________________

Owner: ____________________ By when: ____________________

A good succession plan is not the one on the shelf. It is the one your organization is ready to use.

Protect the mission.
Prepare the organization.
Plan for leadership change.

Thank you

Questions + conversation

Savvy Sales: Relationship-Based Sales for Nonprofits

Get Better at the Ask. Build Stronger Partnerships.

November 3–4 | Two-Day Interactive Training

Join Savvy Strategies Consulting for a practical, hands-on training designed to build confidence and strengthen the way nonprofit professionals approach fundraising and partnership development.

LEARN HOW TO:

- Identify and prioritize the right opportunities
- Uncover needs through stronger discovery conversations
- Build trust and present compelling solutions
- Confidently make the ask
- Navigate objections and move relationships forward

PLUS: A 2-hour virtual reinforcement session to put the learning into practice.

Practical tools. Real-world practice. A repeatable approach you can use immediately.

SCAN TO REGISTER

Tue, Nov 3 & 4, 2026
at 9:00 AM–4:00 PM

5301 Wilkinson Blvd,
Charlotte, NC 28208, USA

Price: $350