

A15: Succession Planning at LTA Rally, Sep 2023 Portland, OR Links and Other Information.

Updated contact information for Emily Boedecker, emily@momentumvt.com and www.momentumvt.com

There are lots of great resources available from introducing the topic of succession planning, to tools when you get into the details of organizational assessment, executive transition and leadership development. Look at a few different resources and then take the best parts of one or more approaches to fit with you and your organization.

Here are two articles to introduce the topic of succession planning.

- [Chronicle of Philanthropy, intro article](#) (you will need to create a free account.
- [Forbes, intro article](#)

Compasspoint has lots of good resources. The page with an overview and many links to tools is [here](#). In the session we looked at:

- a survey for succession readiness
- based on this [checklist for readiness](#), and
- self-reflection questionnaire, [Am I still the leader this agency needs?](#)

The Annie.E.Casey foundation has a number of valuable reports, in particular for this topic

- [Stepping Up Staying Engaged.](#)
- [Leaderful Organizations.](#)

Leading Transitions has a page where they curate other resources, including Annie.E.Casey Stepping up, Staying Engaged report and more detailed descriptions on the three types of succession planning (they just left, I plan to leave, they will leave!)

- [Executive Transition Toolkits](#) from Leading Transitions

We talked about the importance of board development and succession planning. Frank Martinelli, from the Center for Public Skills Training, has a detailed manual for [Board Leader Development and Succession ToolKit](#). Lots of good information in here, don't be put off by the level of detail, and do adapt it to your needs.

For a valuable perspective from the Building Movement Project, read [Leadership in Leaving](#), the

title says it all.

Available for purchase if you do not have a subscription is Nonprofit Quarterly's article on the link between [strategy, succession planning and governance](#).

Boardsource has many valuable resources, and this page [Research and Critical Issues for Nonprofit Boards and Executives](#) is a great place to start.

This case Study in NPQ: [Community Builders Southeast](#), looks at blending succession planning and an executive transition.

When you start to get into the more detailed work.

Joan Garry's [Transition Plan Template](#) for leaders

Here is Bridgespan's [Core and Leadership Competencies Bank](#) to help you identify what skills and competencies you need to pursue your strategic goals.

Here is some information on organizational assessments (with various names of organizational capacity, effectiveness or sustainability assessment), explaining what they are, how to use them, and providing links to self-assessments.

Hewlett Foundations [guide to organizational capacity assessment tools](#), it is written for foundations but also provides great resources for the nonprofits being assessed.

[Organizational mapping tool](#) from National Council of Nonprofits

[Bridgespan's](#) Organizational Effectiveness Diagnostic.

And an essential perspective on how to center racial equity - culture, systems and power in [Capacity Building](#) from Geofunders.

Examples of self assessment tools from the [Oregon Nonprofit Association](#) and [Nonprofitadvancement.org](#), as well as a compilation of [Online free self-assessment tool](#) credited to Greater Twin Cities United Way.

Boardsource's research and advice on [board leadership](#).