

**Bibliography/Resources**

**Succession Planning and Nonprofit Executive Transitions**

Following are some useful resources for succession planning. Some have titles that are self-explanatory. Others include a brief explanation of content. The resources in the Tools and How-To’s subsection include a lot of samples, templates, and other tools that are easily adapted to fit the needs of a specific organization. All these resources were used by in preparation of the PowerPoint for the Hispanic Federation *Entre Familia* webinar on succession planning presented in June 2022.

**Nonprofit Executive Turnover**

Jim Rendon, “Large Numbers of Nonprofit Leaders Are Stepping Down — and the Competition to Find New Ones Is ‘Fierce’,” *Chronicle of Philanthropy,* May 3, 2022 <https://www.philanthropy.com/article/large-numbers-of-nonprofit-leaders-are-stepping-down-and-the-competition-to-find-new-ones-is-fierce?cid=gen_sign_in>

**Research and Sound Practice**

Jennifer Amanda Jones, “Developing Leadership from the Inside Out” A Nonprofit Must-Do”, *Harvard Business Review*, in *Nonprofit Quarterly*, December 17, 2015 <https://nonprofitquarterly.org/developing-leadership-from-the-inside-out/>

*and*

Jean Martin, “For Senior Leaders, Fit Matters More than Skill,” *Harvard Business Review,* January 17, 2014

<https://hbr.org/2014/01/for-senior-leaders-fit-matters-more-than-skill>

These two related articles address the question of hiring internally versus externally, and describe the importance of a good “fit” in determining the success of a new executive.

Jari Tuomala, Donald Yeh & Katie Smith Milway, “Making Founder Successions Work,”

*Stanford Social Innovations Review,* Spring 2018; [https://ssir.org/articles/entry/making\_founder\_successions\_work#](https://ssir.org/articles/entry/making_founder_successions_work).

Includes a discussion of research by the Bridgespan Group on founder transitions.

*Leading with Intent: BoardSource Index of Nonprofit Board Practices,* 2017 and 2021

<https://leadingwithintent.org/>

Two most recent reports on extensive studies “tracking and analyzing trends in nonprofit board leadership.” Both are available from the same webpage.

**Toolkits and How-to’s**

*Nonprofit Succession Planning: Fostering a Culture of Leadership Continuity to Advance Your Mission,* Participant’s Workshop Guide, Third Sector Company, 2014 <https://images.template.net/wp-content/uploads/2016/01/10134119/Nonprofit-Succession-Planning-PDF-Template-Free-Download.pdf>

Includes a detailed Nonprofit Information Inventory and numerous other tools and templates, including sample Board policies for a temporary, unplanned absence; a long-term, unplanned absence; and a permanent change in Executive Director. One of the most practical and valuable succession planning resources.

*Nonprofit Executive Succession-Planning Toolkit,* Federal Reserve Bank of Kansas City, Denver, Oklahoma City, and Omaha, undated <https://www.kansascityfed.org/Community/documents/82/nonprofit-resources-NONPROFIT-TOOLKIT.pdf>

Widely referenced. Includes many useful planning templates and suggested timelines for both emergency and “departure-defined” succession.

*Preparing for Your Community Action Agency’s Future: Sustainability, Succession & Transition, Part 3: Executive Transition Management Guide,* Community Action Partnership, in partnership with TransitionGuides, September 2012

<https://communityactionpartnership.com/wp-content/uploads/2018/08/11_Preparing_Part3_Transition.pdf>

Describes three phases in executive transition: Prepare, Search & Select, and Onboard, with lots of practical do’s and don’ts. Includes multiple appendices with tools, among them a Sample Transition Timeline, Interim Chief Executive Sample Agreement & Work Plan, Sample Employment Offer Letter, and Sample Chief Executive 90-Day Entry Plan.

“Communicating a Planned CEO Transition,” BoardSource, 2017

<https://boardsource.org/wp-content/uploads/2017/05/Communicating-PlannedCEO-Transition.pdf?hsCtaTracking=49e2ae6d-e05d-47f0-9fc6-64c94eb2d9aa%7C3b1078e9-b109-44a2-bc6a-e56d761a457a>

Describes a four-part process for communicating a planned executive transition, including Pre-Departure Announcement Planning, Departure Announcement, Progress Communications, and New Executive Introduction.

**Tips and Guidance**

Sayana Izmailova, “Nonprofit Succession Planning: 50 Practical Tips,” WildApricot, Personify, April 12, 2021

 <https://www.wildapricot.com/blog/nonprofit-succession-planning#what-you-can-do-now>

Lots of practical and sometimes out-of-the-box tips for every step of the executive transition process.

“Five Tips for Emergency Succession Planning,” Empower Success Corps, June 16, 2014

<https://www.empowersuccesscorps.org/blog/5-tips-for-emergency-succession-planning/>

Don Tebbe, “What to Do BEFORE You Fire Your Executive Director,” *LinkedIn*, March 12, 2020 <https://www.linkedin.com/pulse/what-do-before-you-fire-your-executive-director-don-teb>.

Deborah Jacobs, “Five Principles to Help Non-Profit Boards Protect Staff and Other Assets When Firing an Executive Director, *LinkedIn*, October 7, 2014 <https://www.linkedin.com/pulse/20141007151428-34112204-five-principles-to-help-non-profit-boards-protect-staff-and-other-assets-when-firing-an-executive-director/>

Laurie Lipper and Wendy Lazarus. “Six Strategies for Nonprofit Leadership Transition,” *Stanford Social Innovations Review,* May 30, 2017 <https://ssir.org/articles/entry/six_strategies_for_nonprofit_leadership_transition?utm_source=Enews&utm_medium=Email&utm_campaign=SSIR_Now&utm_content=Title>

Provides strategies executives can use to facilitate their own transition, from “Fully unpack the decision” to “Engage the staff, and think creatively about leadership.”

Joan Garry Consulting, “‘Founder Syndrome’ Can Take Down a Nonprofit. Here’s How to Avoid It,” undated

 <https://blog.joangarry.com/founder-syndrome/>

“5 Expert Steps for a Nonprofit Executive Transition Plan,” Aly Sterling Philanthropy, undated <https://alysterling.com/nonprofit-executive-director-transition/>

Uses a paradigm similar to the Federal Reserve Toolkit – emergency transition, planned departure, and strategic transition – and provides clear, practical steps.