

SUCCESSION PLANNING CHECKLIST FOR VOLUNTEER AND COMMUNITY LEADERS

- Who besides me knows where the event records are kept? Does anyone have a separate copy of event records?
- Do my core volunteers have, or do they know whom to ask, to easily get a list of key constituents for transition communications? How recently have I personally reviewed and updated that list?
- If I were unable to work on this event for an extended period of time, what might not get done, stalled, or forgotten? (The longer this list the more you need a succession plan!)
- Do I keep a lot of information in my head or in my own private records that has never really been transferred to my event files or core volunteer leaders? Are there donors (cash or in-kind) who only want to talk to me? Other key relationships that only I maintain? What would happen to these relationships if I left? Would the event suffer as a result? What am I going to do to change that?
- Do I maintain a log of important information “just in case”? What am I working on now that other key volunteers would need to know about to carry on without me? Are all my files organized and properly labeled?
- Is there any confidential information to which only I have access? Does anyone have a copy of keys to the office storing important records?
- Are my key contacts in order and easily identified in my computer address system or phone book/rolodex?
- If you keep important event files on a shared or private computer, who else besides the system administrator has a listing of all computer passwords, including mine? Does my group of core volunteer leaders know who that is?
- Look at your group of core volunteer leaders. Who would you be lost without? Who would you be better off without? Have you delegated specific areas of your responsibilities to the gems of your team?
- Is there someone that should be appointed the primary leadership role in your absence? Does the core team know who that person is? Have you prepared that person to take this role? (In other words, could they provide the answers to all of the questions on this page to the other team members if the need arises?)
- Do the important constituents outside of our team know the leaders on our team that they can contact for different areas of responsibility should they need to do so? Do members of our core leadership group know what responsibilities they should assume during an unplanned absence or a leadership transition?

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- Do my core leadership members keep a log of important information “just in case”? If one of my key leaders left, would I know where to find their key contacts? Do I know what issues that person is working on that either I or other members of the leadership team would need to know about or follow-up on?
- Who has the authority to sign checks and disburse payments in my absence? Do the people who need to know that, know? Am I the sole signing authority on any account? (If so, you should not be! Take care of this now.)
- Are there back ups of all computer materials made at least weekly that are kept off site? Who keeps this information off site? Would someone else in the leadership team know where to get it off site if we needed it? (This question assumes that you operate out of a shared office space.)
- Are you actively developing leaders from among your core volunteers and most talented and enthusiastic volunteers? If you have a leadership team, are they developing leaders among your broader base of volunteers?
- Is there an event planning manual or an operations manual for your program or event? Do you share this information with your main group of volunteers? Does anyone beside you have a copy?
- Do you have a written transition plan that has been distributed to key leaders in your group that outlines the answers to these questions?
- After reading this list, can I think of anything else I should do or plan for?

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