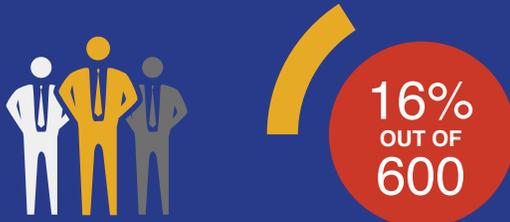


Five Steps to Support Nonprofit Board Succession Planning

Your board members are a vital part of your team and it is important to build an effective board. Organizations often focus time and resources on board training and engagement strategies for current board members. While this is recommended, an often-overlooked component is planning for board member transitions.

Does your organization have and utilize a succession plan to prepare for inevitable board turnover? Having a plan will make board member departures smooth transitions instead of emergency situations. According to a Bloomerang survey, only 16% of 600 nonprofit organizations surveyed are regularly utilizing succession plans throughout the year. Learn how your organization can begin developing a plan or improve your current process to support organizational stability, capture institutional knowledge, and develop future leaders.



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You are ready to implement your plan and on the path to successful board member transitions! Remember to evaluate and solicit feedback to evolve the process to work best for your organization.

Contact us at info@theinsgroup.com or visit www.theinsgroup.com/nonprofitblog for more resources to help achieve your goals.

1 Assess

The key first step is understanding the current succession planning culture. What is your organization's current transition planning process for board members? What are your organization's key needs for succession planning? Are board member roles and responsibilities clear, updated, and shareable with potential board members for recruitment?



2 Research

Take time to gather ideas and review strategies. Many organizations formalize the process through a governance, board development, or nominating committee that is tasked with board succession planning. The National Council of Nonprofits also offers resources to prepare for the development stage.

3 Develop

Develop a custom process for succession planning using your research and internal stakeholder input. An external consultant can share expertise and facilitate incorporating new strategies like a board member shadowing program to build your succession pipeline and prepare future leaders.



4 Document

Clearly document your succession planning policy and save it in a collaborative environment like Google Drive for board engagement and review. Include documents like a board recruitment toolkit, onboarding and offboarding materials including board committee and position descriptions, and a board matrix to support the various steps of transition planning.



5 Communicate

Communication of your organization's succession planning policy to stakeholders is imperative to its success. Making it easily accessible and revisiting it at least quarterly will embed it in your board culture. And board members will appreciate understanding expectations and their role in the process.

