

Checklist for a Healthy Succession

Creating a healthy succession process is a vital leadership duty.

When an outgoing leader is preparing for succession or transition, ensuring a smooth and strategic handover is crucial for the organization's continued success. Though this checklist is designed for churches, it can easily be translated for nonprofits as well.

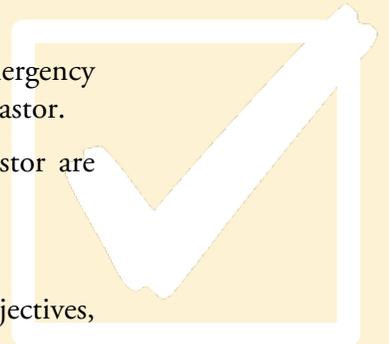
The checklist consists of two sections for the hypothetical "Your Community Church." The first part is a "succession preparation" exercise to determine which of the points need clarification and may require further work. These should be done well in advance of a succession and possibly include necessary bylaws revisions.

The second section is a series of questions that should be considered by the outgoing Senior Pastor and the Board just prior to the actual succession.

Part One

The Senior Pastor and Board are advised to evaluate the following "succession-preparation" checklist for "Your Community Church" ("YCC") and establish a task group to work on items that require attention along with a designated timeline for completion:

- YCC's bylaws/constitution reflect a clear process for both 1) an emergency absence of the Senior Pastor, and 2) a planned transition for the Senior Pastor.
- Performance and achievement of strategic objectives by the Senior Pastor are annually evaluated by the Board.
- YCC has at least 3 months of operating capital in reserves.
- YCC has a current 2–3-year strategic plan with clearly articulated goals, objectives, and benchmarks/measurements.
- Financial reports are current and accessible to the Board and executive staff who have financial viability/strength responsibilities.
- By way of an annual self-assessment, the Board is effectively performing all governance tasks: financial accountability, strategic planning in conjunction with the Senior Pastor, policy development, and support of the Senior Pastor.



- The Board has confidence that YCC's top leadership team 1) can lead in the absence of the Senior Pastor, 2) has authority to make decisions within their areas of responsibility, and 3) has a healthy leadership culture and work effectively and efficiently together.
- Job descriptions throughout the organization are accurate and current.

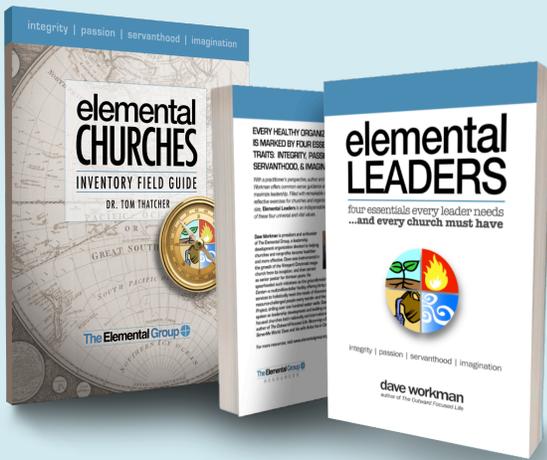
Part Two

The following key transition process questions should be covered by Your Community Church's Senior Pastor and Board prior to an actual succession:

- Who is on the search team and are the roles and responsibilities clearly articulated?
- Has the Board/Senior Pastor established a timeline of transition and departure?
- Depending on the speed of the current Senior Pastor's exit, is an interim needed?
- Is the current Senior Pastor's compensation competitive at the time of succession?
- Is the candidate search internal or external, and if both, prioritized?
- What are the criteria required for the candidate (qualities, skills, and experience)?
- Is there an internal leadership development/hand-off process in place?
- Will an executive search consultative service be used and if so, how is it identified and selected?
- Is there both an updated job description and profile defined?
- Are there any changes to make at the time of succession regarding the relationship of the Board and the next Senior Pastor?
- Are there any "untouchables" (programs, facilities, personnel, etc.) the incoming Senior Pastor needs to be aware of?
- What are the circles of communication and order of rollout? Has a point person been assigned for communication and public relations?
- What are the current issues/challenges the incoming Senior Pastor will need to address?
- Is there a need for ongoing mentoring/coaching of the incoming Senior Pastor?

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