

Nonprofit Strategies



SAN LUIS OBISPO COUNTY COMMUNITY FOUNDATION

Ensure leadership transitions are orderly

By Barry VanderKelen

Ideally, all nonprofit groups have an organized orientation for new members to their boards of directors. But how many have an orientation for new presidents?

At the end of June, many local nonprofit organizations will be passing their board presidents' gavels from one person to another.

Now is the time to prepare a transition guide checklist that can be used to make the leadership change orderly.

The checklist would guide the outgoing president's briefing of his or her replacement.

The checklist should include all of the items one president needs to know at the beginning of a term. Yet it doesn't need to be longer than one page.

The purpose of the list is to structure a discussion between the outgoing and the incoming leaders.

It is meant to make sure the new president understands why things are being done the way they are. Here is a sample checklist:

- The organization's mission and values.
- Job description of the president or chairman, including a calendar that shows key dates for

board activities, expected or suggested community events to attend and what community leaders the new president must meet and work with.

- Job descriptions of board officers
- Responsibilities of the board
- Purposes of each board committee
- Status of strategic planning: When was the last plan written, has it been followed, when will it be time for a new one?
- Job description of the executive director
- Finances of the organization, including financial statements, audit and control procedures and the budget process: What are the big financial issues facing the organization?
- Development: Where does the money come from and for what purposes? Who's responsible for soliciting board members' annual gifts? How many solicitations are board members expected to make?
- Human resources: Who assures the organization is compliant with labor laws and regulations? Who is responsible for monitoring emerg-

ing regulations?

- How are board meeting agendas created?
- Outgoing president: What was the best thing you did during your term?
- Outgoing president: Knowing what you know now, what would you have done differently during your term?
- Outgoing president: What about the organization kept you awake at night?

Depending on the skills and experience of the new president and the needs of the organization, some topics will take longer to discuss than others.

The discussion doesn't need to be exhaustive because the new president will need to read relevant policies and reports, and forge his or her own relationship with the executive director.

Understandably, the new president brings new ideas and energy to the position.

Without a smooth transition process, however, resentments and misunderstandings about the workings of the board among the members can develop.

Resource Use

- Support nonprofit leadership
- Board development/training
- Strategic planning

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The San Luis Obispo Tribune publishes a column every other week in the Business section dedicated to the business practices of nonprofit orgs. Barry VanderKelen, Executive Director of the San Luis Obispo County Community Foundation writes the bi-

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