

Succession Planning Training

- 9:00am Welcome and Introductions
Warm up: What do participants want to take away from the day?
- 9:30am Overview of the day packets/file folders
Brief discussion:
- if you did not go back to the office, what one word would describe what you leave behind?
 - what is succession planning?
 - why is it important?
- 9:45am Program Sustainability
- tied to succession planning
 - everything in the organization is related/connected and can be strengthened by sustainability planning
- 10:00am The Brass Tacks (background)
- A. Types of Succession Planning (overview of needs & components we will cover – why legacy is important)
1. Executive
 2. Programs (ask group for stories)
 3. Significant Leadership (Board, etc) shine light – not spend a lot of time
- B. Kinds of succession preparation: different circumstances
1. Triage (sample)
 2. Prepared emergency (sample)
 3. Advance – thorough – tool
- 11:00 BREAK
- 11:15 C Framework for the details (see sustainability grid)
- a. Programs & how to monitor (sample workplan & evaluation)
 - b. TOOL Administration & governance & how to monitor
- 12:00 BREAK
- 1:30pm D. Breakouts: What would be inside your...
1. Administration manual
 2. Calendar
 3. Operations manual
- 3pm Getting Started
- A. Whom to involve
 - B. What you can do
 - C. Do it!
- Adjourn