

Worksheet 4: Preparation and Transition

This worksheet will help you outline a plan for transitioning roles and preparing your successors. To complete this worksheet, it will be helpful to have on hand previous decisions you've made about philanthropic purpose, governance, and operations.

Vision for Success

What values and principles should guide the preparation and transition processes?

What role(s) do I hope I'll play (if any) after the transition is complete?

What do I hope for my successors as people? How do I hope they thrive and flourish?

What should they and I experience and feel during the transitions?

How should the community feel about the transfer of roles and resources to these successors or to new organizations?

Succession Plan

Use the charts below to document the:

- Roles that will transition (e.g., board membership, grant committee composition, or an operational function)
- When you see the transition occurring (e.g., a specific circumstance such as retirement or a specific age)
- The knowledge, skills, and attributes you hope they have to fill the role successfully
- Who the potential successor(s) may be to fill those roles (specific names or groups of people)
- Discussions or activities you hope to implement to ensure you prepare everyone involved for the transition
- Other notes about the process.

ROLE:	
When	
Whom	
Knowledge, skills, attributes	
Preparation process	
Notes	

ROLE:	
When	
Whom	
Knowledge, skills, attributes	
Preparation process	
Notes	

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