Succession Planning Activities Checklist

1. Risk Prevention
   - Create a list of the key supporters (donors, funders, regulatory bodies) for your organization to facilitate quick communication when needed
   - Create a list of community stakeholder and planning groups as well as a list of who regularly attends and who covers when needed
   - Develop an annual calendar of routine agenda items for board & committee meetings
   - Develop an annual calendar of routine agenda items for organization leadership teams

2. Emergency Plan
   - Create an emergency succession plan that is annually reviewed
   - Create a board policy on delegation of authority and standing appointments
   - Start a list of your compliance and regulatory requirements
   - Make sure there is more than one signer at your banking institutions

3. Regular Conversations
   - Identify the annual routine process to embed succession planning conversations
   - Adopt a plan format and move forward

4. Leader Development
   - Create a temporary staffing strategy
   - Maintain networks of viable leaders

5. Legacy Planning
   - Leaders can complete a legacy statement