Leadership Succession Planning Resource

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Table of Contents

1. Introduction

Ontario Organizational Development Program

The Ontario Organizational Development Program (OODP) provides customized services to meet the organizational development needs of community-based HIV/AIDS organizations and programs. Established in 1995, the mission of the OODP is to strengthen the capacity of HIV/AIDS organizations and programs in Ontario to determine their direction with awareness and to foster a culture within HIV/AIDS organizations and programs in Ontario to take responsibility for their own organizational development.

Ontario AIDS Network (OAN)

The Ontario AIDS Network (OAN) is a membership-based organization providing learning, leadership, and advocacy support to a network of 45 member organizations working to deliver Ontario's HIV and AIDS response in rural, remote and urban areas across the province.

Ontario Provincial Resource for ASO Human Resources (OPRAH)

OPRAH is a program offered to OAN member and affiliate agencies. It is funded by the HIV and Hepatitis C Programs (HHP), Ontario Ministry of Health and delivered by Pivotal HR Solutions. This program provides one-on-one human resources consultation support to Executive Directors, middle managers, and Board Chairs/Presidents. The OPRAH program makes available consultant support in relation to general human resources (HR) supports and labour relations. Through this program, OAN members and affiliates can also access an online HR database (HR Downloads) with HR-related tools, HR information system, and templates to support their work.

Succession Planning and Its Importance

Succession planning is "the process of identifying the critical positions within your organization and developing action plans for individuals to assume those positions…It identifies future staffing needs and the people with the skills and potential to perform in

these future roles."[1] Succession planning should be less about answering the question of who will fill what position and more about answering the question of who are strong candidates for taking on a new leadership role in the future.[2] It is intentional work that requires time and resources. It is good practice to make succession planning a part of your organization's human resources management and development practices and not a one-off occurrence. When your organization engages in a succession planning process, the result is considered a succession plan.

Succession planning is important because it:
- ✓ Identifies critical positions and potential vacancies.
- ✓ Identifies key competencies necessary for leadership continuity.
- ✓ Focuses development of individuals to meet future organizational needs.
- ✓ Enables leadership continuity in the event of change in key personnel.

Within organizations, change in key personnel may result from several types of departures. There may be planned departures that are temporary, such as a temporary leave of absence, parental leave or secondment, or permanent departures, such as a resignation or retirement. There may also be emergency departures where a position becomes vacant quickly or unexpectedly and the departures may be temporary, such as an emergency medical leave, or permanent, such as a termination, resignation or death.

The purpose of this *Leadership Succession Planning Resource* is to outline a process for succession planning for leadership positions and provide tools to undertake the process successfully. It includes guidance on recruitment and hiring of a permanent Executive Director and a workplan template to support this work. The *Leadership Succession Planning Resource* is intended for Executive Directors and Board of Directors in the HIV sector in Ontario.

The *Leadership Succession Planning Resource* begins with a 6-step process for succession planning. This section can be used by both an Executive Director and a Board of Directors. The next section provides an overview of the available options for the recruitment and hiring of a permanent Executive Director and is intended for a Board of Directors. The final two sections speak to the maintenance of succession plans and the need to develop a communication plan to communicate changes in leadership to key stakeholders. These sections can be used by both an Executive Director and a Board of Directors. The *Resource* concludes with appendices to support succession planning, including a list of leadership competencies and various templates.

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[1] University of Washington (2016). *Succession Planning Toolkit.* Accessed at https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf.

[2] The Bridgespan Group (2021). *Succeeding with Succession and Nonprofit Executive Transition Webinar*, *September 14, 2021*

2. Process for Succession Planning

Step 1: Identify Competencies and Values	Step 2: Develop Position Succession Plans and Short-term Replacement Plans	Step 3: Create Leadership Pipeline View	Step 4: Plan Leadership Pipeline Development and External Hires	Step 5: Strengthen Leadership Pipeline	Step 6: Develop Long-term Replacement Plan
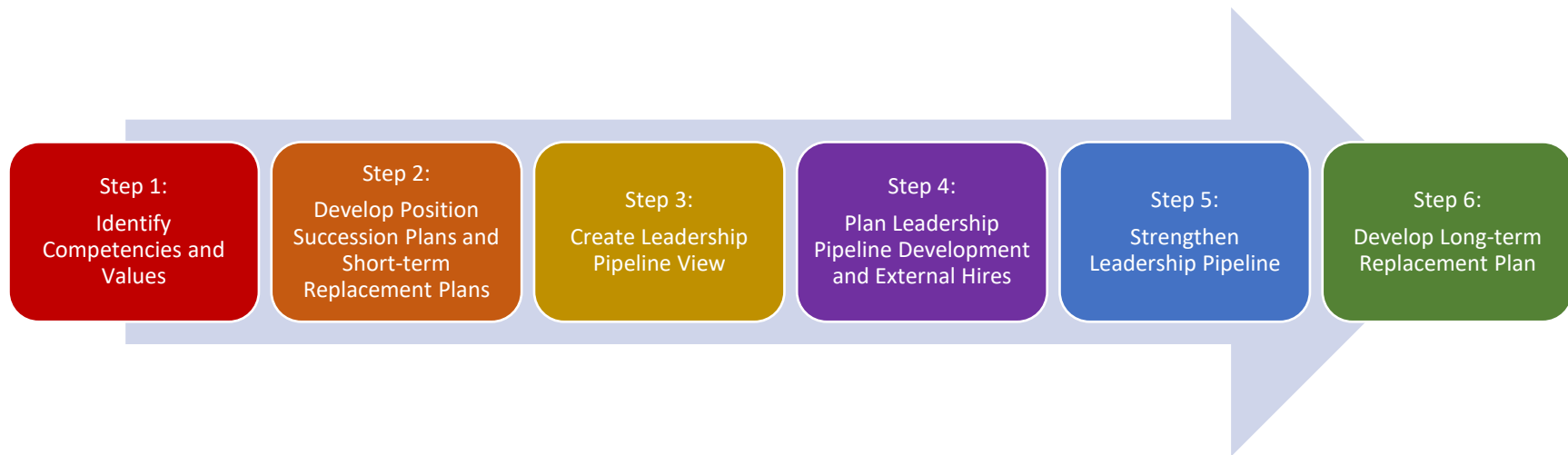
Step 1: Identify Competencies and Values

To initiate succession planning, if your organization has existing competencies and values for your leadership positions, then they should be reviewed and confirmed or revised with consideration for the organization's priorities, the challenges it may face in the coming years, and what's needed in a new leader coming into a position. It is possible that different competencies may need to be prioritized for a new leader coming into your organization today versus years ago, e.g. ability to apply a decolonizing and GIPA/MEPA-focused[3] lens to the organization's work. If competencies and/or values have not previously been identified, then time should be taken to do the identification. It is good practice to review the competencies and values every 2-3 years and as needed, refine them. **Appendix A** is a list of general leadership competencies and HIV sector values that can be pulled from or adapted for your organization during the identification or review process.

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[3] GIPA stands for the Greater Involvement of People Living with HIV/AIDS and MEPA stands for the Meaningful Engagement of People Living with HIV/AIDS.

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Step 2: Develop Position Succession Plans and Short-term Replacement Plans

Once competencies and values for leadership positions have been identified, individual position succession plans should be developed. The purpose of these plans is to identify possible internal successors for a position and their likely timelines for being able to take on a leadership role. The development of the plans requires each leader to create a succession plan for their role. Before the creation of the succession plan, each leader should discuss, with any potential successor, their interest in being a potential successor. This conversation must be handled delicately so as to not imply that being identified as a potential successor is a guarantee to the position in the future. Once it has been established that the potential successor is interested, further action will be needed as described below in Step 4. For the Executive Director, the Board of Directors should approve their succession plan. For the other leadership positions, the Executive Director should approve their succession plans. **Appendix B** is a template for an individual position succession plan.

One of the components of an individual succession plan is identifying a short-term or interim replacement for the role, particularly to respond to emergency departures. To support this short-term or interim role, each leader should prepare a short-term replacement plan to complement the succession plan.[4] In addition to identifying who, if anyone, could be in the position, the short-term replacement plan would include key tasks to be covered in detail, who will cover the tasks, what preparation is needed to cover the tasks and how much compensation[5] will be provided for the additional responsibilities. For this *Leadership Succession Planning Resource,* short-term means a period of up to six (6) months, however that period may be extended. **Appendix C** is a template for a short-term replacement plan.

Step 3: Create Leadership Pipeline View

Following the completion of a succession plan for each leadership role, the individual plans should be consolidated to create one succession plan for the entire organization. The consolidated plan will provide an organization-wide view of the leadership pipeline, namely the route for identifying, developing or recruiting leaders. It will include who the current and potential leaders are, what

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[4] Replacement planning is not the same as succession planning. Replacement planning focuses on filling a short-term or long-term need for a specific position while succession planning focuses on developing the skills and potential of staff to be able to fill a specific position. For more information on the difference between replacement planning and succession planning, see https://www.sigmaassessmentsystems.com/succession-planning-vs-replacement-hiring/.

[5] An Executive Director or Board of Directors can access HIV sector compensation information in the *Ontario AIDS Network 2021 Compensation and Benefits Survey Report* available through the Ontario AIDS Network (OAN) or by reaching out to the OAN's Ontario Provincial Resource for ASO Human Resources (OPRAH) program.

competencies they possess and in what areas they require development. It will also identify the gaps in talent, diversity and other factors that are of importance to the health and smooth operation of the organization.

Step 4: Plan Leadership Pipeline Development and External Hires

With a clear picture of where coverage and gaps exist in the leadership pipeline, your organization should determine which positions require hiring someone who is external to the organization. At the same time, your organization should be identifying how to strengthen the leadership pipeline. This strengthening process requires a tailored approach for each leader or potential leader, and must be co-created with each leader or potential leader. The approach to be taken should include identifying the position competencies the leader or potential leader has, the competencies that need to be developed or strengthened, and the strategy for that development or strengthening. The approach should also include systems for accountability and checking in on progress. Some of the ways to strengthen the pipeline include supporting and/or requiring leaders and potential leaders to undertake performance improvement activities such as courses, trainings, coaching, mentoring or secondments. **Appendix D** is a template for a leadership competencies gap analysis and response.

Step 5: Strengthen Leadership Pipeline

Once it has been established how to strengthen the leadership pipeline, the next step is to do it – implement the identified actions for each leader or potential leader. As activities are underway, mechanisms should be established for the leaders and potential leaders to check in about their experiences, raise concerns and ask questions.

Step 6: Develop Long-term Replacement Plan

With an organization-wide succession plan and role-specific short-term replacement plans in place, attention should be given to the development of a long-term replacement plan for leadership positions. For this *Leadership Succession Planning Resource,* long-term means a period of more than six (6) months. In developing a long-term replacement plan, consideration should be given to whether a staged approach might be necessary given factors such as budget, whether an organization is stable or in crisis, ability of the short-term, acting leader to continue in the role, and degree of certainty that the departed leader will return to their position. A staged approach could mean temporarily filling a position for an extended period of time before filling it permanently. **Appendix E** is a template for an inventory of information and contacts.

3. Permanent Replacement of Executive Director

As the senior leader of an organization, the permanent replacement of an Executive Director is critical to your organization's success. Thoughtful planning is needed to ensure the right person is hired to lead the organization into the future.

When it comes to managing the recruitment and hiring process for a permanent Executive Director, organizations in the HIV sector in Ontario have a range of options to choose from. The following are three (3) options to consider:

A. *Internal – Board only:* The organization's Board of Directors carries out the entire process on its own.
   i. For this to be a viable option for the Board, there should be human resources expertise on the Board. The Board should also have up-to-date organizational policies to guide their work and Board members with the knowledge, skills and time required to participate in a hiring committee that can effectively carry out the entire process and report back to the Board.

B. *Internal – Board with support:* The organization's Board of Directors carries out the entire process with administrative support from the organization's staff, support from the OODP and/or support from OPRAH.
   i. The OODP and OPRAH can provide specific, clearly defined support. For example, the OODP could assist with activities such as the development of the recruitment and hiring workplan or facilitation of Hiring Committee meetings. OPRAH could assist with implementation of the recruitment and hiring workplan or components of the workplan.

C. *External:* The organization's Board of Directors hires external support, such as a consultant (individual or company), to carry out the process while the Board provides direction and oversight.
   i. When hiring external support, consideration should be given to the consultant's experience in successfully recruiting senior leaders for not-for-profit organizations and their understanding of the HIV sector and its values. The consultant's approach, timelines and cost should be documented and agreed upon before the work commences.

When determining which option to go with for the recruitment and hiring of a permanent Executive Director, the Board will need to exercise care and be meticulous in its actions. It will need to consider its capacity, resources and available supports to ensure a successful outcome for one of the most important decisions a Board may have to make. Should the Board require support in its decision-making, they can speak with the OODP Program Administrator.

Appendix F is a template for an Executive Director recruitment and hiring process workplan. **Appendix G** is a template for an Executive Director job description.

4. Maintenance of Succession Plans

Once developed, individual position succession plans should be reviewed and updated annually or sooner if there is a significant change in staff or your organization, such as an unexpected departure of the Executive Director. Each leader should be responsible for refreshing their position's plan. The Executive Director's updated succession plan should be approved by the Board and the other leaders' updated succession plans should be approved by the Executive Director. Once approved, an updated consolidated plan for the organization should be prepared.

5. Communication Plan

With changes in leadership, especially an Executive Director, it is important to communicate the change to key stakeholders. A communication plan should be developed to identify who needs to be informed of which changes when, how and by whom. Depending on the position, key stakeholders might include staff, Board, funders, donors, volunteers, service users, key community partners and vendors.

6. Appendices

APPENDIX A: List of General Leadership Competencies and HIV Sector Values

Leadership Competencies

Leading the Organization	Leading Others	Leading Self
• Take a strategic perspective on issues • Set vision and strategy • Apply an anti-racism and anti-oppression (ARAO) analysis to organization's work • Apply a decolonizing lens to organization's work • Manage ongoing change • Proactively solve problems • Make decisions • Influence others • Take and manage risks • Innovate • Manage the work • Learn new skills and knowledge • Be open to new ideas and ways of working • Show resourcefulness • Think critically and analytically • Demonstrate adaptability in dealing with complexity in environments characterized by ongoing change	• Communicate often and effectively • Value diversity and difference • Build and maintain relationships • Build a sense of team and support teams through the work • Motivate, involve and develop others • Support calculated risk taking and use failure as teachable opportunities • Demonstrate fairness • Show compassion	• Demonstrate ethics and integrity • Display drive and purpose • Show self-awareness • Role model learning and unlearning related to ARAO and decolonization • Express adaptability • Take initiative • Demonstrate composure • Balance work and life • Manage own career and development

HIV Sector Values

There are many values that guide the work of the HIV sector in Ontario, including historically HIV-specific organizations whose mandates have expanded beyond HIV. Each organization has its own set of values and across organizations, there are some common

OODP

values. Over time, the language used in values changes and new values are adopted, e.g. anti-racism and anti-oppression. The information below is from a particular moment in time in the HIV sector. It is presented as reference to support organizations as they identify or review their own values.

In 2016, the *HIV/AIDS Strategy to 2026: Focusing Our Efforts – Changing the Course of the HIV Prevention, Engagement and Care Cascade in Ontario* was released. It was produced with the involvement of many people in the sector, including people living with HIV/AIDS, workers and volunteers of community-based AIDS service organizations, staff of local public health units, staff of HIV clinics, researchers, policy makers and others involved in sexual health and HIV prevention, care, treatment and support in Ontario. In the document, the following were identified as the principles that drive the response to HIV:

- **RESILIENCE.** People with HIV and populations at risk are resilient and have great strengths. All programs and services will use a strengths-based approach to increase resilience and create healthy inclusive communities.

- **GREATER INVOLVEMENT AND MEANINGFUL ENGAGEMENT OF PEOPLE WITH HIV/AIDS (GIPA/MEPA) AND PEOPLE AT RISK.** The lived experience of people with and at risk of HIV drives and informs Ontario's response. We commit to the greater involvement and meaningful engagement of people living with HIV/AIDS (GIPA/MEPA) and people at risk. GIPA/MEPA puts people living with and at risk of HIV at the centre of our work and is grounded in human rights and the dignity of the full human being.

- **HARM REDUCTION.** We support a harm reduction approach. HIV programs and services work to reduce the health and social harms associated with risk behaviours and with HIV infection.

- **SOCIAL JUSTICE/HUMAN RIGHTS.** All in Ontario have the right to equitable access to stigma-free health and social services that will help them protect and maintain their health.

- **INTEGRATED, PERSON-CENTRED PREVENTION AND ENGAGEMENT IN CARE.** All parts of the health and social service systems work together, using a systems approach, to provide integrated prevention and care programs and services that meet the needs of people with and at risk of HIV.

- **CHOICE AND SELF-DETERMINATION.** People have the right to make choices about their care, and to have the information and support they need to make informed decisions.

- **PRIVACY AND CONFIDENTIALITY.** People living with or at risk of HIV have the right to have their health information kept confidential.

- **RESPECT FOR DIVERSITY.** Needs vary based on geography, culture, language, social context and individual heterogeneity. People living with or at risk of HIV have access to appropriate services that meet their diverse needs.

- **EVIDENCE, EXCELLENCE AND INNOVATION.** HIV programs and services in Ontario are evidence-based, timely, accessible, safe, effective and efficient. We strive for excellence and are committed to contributing to new knowledge. We develop and support

communities of practice. We use evidence from research and practice as well as lived experience to innovate and continually improve our programs and services.

- o **COLLABORATION.** Government, communities and organizations collaborate strategically to ensure people living with and at risk of HIV have access to culturally appropriate, responsive, welcoming services when they need them. They actively share, promote and adopt evidence-based practices.

- o **IMPACT.** Public resources for HIV prevention, care and support are invested in programs, services and research that focus where there is the greatest need and the greatest potential to have an impact on health and to achieve our goals, objectives and targets.

- o **ACCOUNTABILITY.** Provincially funded programs are guided by provincial policies and standards and responsive to local needs. They are accountable to the communities they serve for providing high-quality, cost-effective, accessible and sustainable services and for helping to achieve the goals and targets of this strategy. They monitor and measure the impact of their services, and report on their progress and lessons learned.

APPENDIX B: Individual Position Succession Plan Template

Position and Name		Interim	Succession Plan					
Position Title	Incumbent Name	Short-term Replacement (up to 6 months)	Ready Now Potential Successor(s)	Completed Gap Analysis & Response[6]	Ready in 1-2 Years Potential Successor(s)	Completed Gap Analysis & Response	Ready in 3+ Years Potential Successor(s)	Completed Gap Analysis & Response
[insert your position]	[insert your name]	[insert name(s) and current title of person(s) to fill in]	[insert name(s) of potential successor(s)]	[insert Yes, No or N/A]	[insert name(s) of potential successor(s)]	[insert Yes, No or N/A]	[insert name(s) of potential successor(s)]	[insert Yes, No or N/A]
Example: Program Director	Example: Keisha Simpson	Example: John Lu (Program Coordinator) Priya Patel (Support Coordinator)	Example: None (hire externally)	Example: N/A	Example: Priya Patel	Example: Yes	Example: John Lu	Example: Yes

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[6] See Appendix D: Leadership Competencies Gap Analysis and Response Template.

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APPENDIX C: Short-term Replacement Plan Template

Name of Acting [insert title], if anyone:

Scope of Authority/Decision-making: [e.g. full authority for decision-making and independent action as the [insert title]]

Compensation to be provided for additional responsibilities: [i.e. amount of compensation]

Reports to:

Person(s) to provide onboarding to organization and HIV sector, if applicable:

Key Tasks to Cover in Detail	Who Will Cover Tasks	Preparation Needed to Cover Tasks

APPENDIX D: Leadership Competencies Gap Analysis and Response Template

Position Title:

Incumbent Name:

Potential Successor:

Potential Successor's Current Title:

Required Competencies	Current Competencies	Gaps
[insert competencies required for position]	[insert required competencies that potential successor currently has]	[insert required competencies that potential successor does not currently have]

From the current competencies, which need strengthening:

Organizational experience, lived experience and other relevant factors to consider about potential successor, e.g. length of time with organization, HIV status, racial diversity:

Competencies to Strengthen or Develop	Activities to Strengthen or Develop Competencies	Timeline	RESULTS
[insert competencies that potential successor needs to strengthen or does not have]	[insert activities to be undertaken to strengthen or develop competencies]	[insert timeline for activities to be done]	[insert results of activities completed]

APPENDIX E: Inventory of Information and Contacts Template

This inventory should be prepared and regularly updated by the Executive Director. At least one other person in the organization should always have a copy or know where to find it in case of an emergency departure by the Executive Director.

In the Details column, note all significant information and be as specific as possible, e.g. names, contact information, policy numbers, who has what information, and where information is stored.

Items	Details
1. Keys and Passcodes	
2. Corporate Information	
3. Human Resources Information	
4. Financial and Payroll Information • Auditor	
5. Technology Information	
6. Facilities Information	
7. Lawyer Information	
8. Insurance Information	
9. Key Stakeholders Information • Funders • Board Members	
10. Other Relevant Information	

APPENDIX F: OODP Executive Director Recruitment and Hiring Process Workplan Template

This high-level workplan template is intended for Board of Directors to support their recruitment and hiring of an Executive Director (ED). The template is designed to be used by a Board that is carrying out the process by itself or with administrative support from staff, support from the OODP and/or support from OPRAH. The timing and activities noted are suggested and may need to be modified based on the realities for your organization.

<p align="center">**[Name of organization]**
Executive Director Recruitment and Hiring Process</p>

	Activity	Lead	Who Else To Be Involved	Timeframe	Notes
WEEK 1	1. Determine if Board will manage process itself or seek support from OODP and/or OPRAH o If needed, submit request for support to OODP and/or OPRAH				• OODP Request: https://asolounge.oodp.ca/ • OPRAH Request: https://oan.red/oprah/
	2. Identify and contract with Acting ED				
	3. Announce Acting ED and process initiated to recruit permanent ED o Anticipating new ED by when				
WEEK 2	4. Review and if needed, update job description and compensation package information				
	5. Determine application and initial screening process				
	6. Identify Hiring Committee responsibilities and recruit members				
	7. Establish interview dates – 1st and 2nd interviews				
	8. Prepare job posting				
	9. Prepare candidate screening tool and process				

	Activity	Lead	Who Else To Be Involved	Timeframe	Notes
	10. Prepare questions for 1st and 2nd interviews, and reference check				
WEEKS 3 – 6	11. Distribute job posting o Where?				• Charity Village or Indeed ($), locally, provincial newsletters
	12. Conduct initial application screening and identify candidates for 1st interview				
WEEK 6	13. Provide orientation, applications and 1st interview materials to Hiring Committee				
WEEK 7	14. Set up 1st interviews o Inform unsuccessful candidates that they will not be interviewed				
WEEK 8	15. Conduct 1st interviews				
	16. Set up 2nd interviews o Inform unsuccessful candidates that they will not be interviewed				
WEEKS 9 - 10	17. Conduct 2nd interviews				
	18. Conduct reference check				
	19. Offer position, negotiate contract and hire (sign contract)				
WEEK 11 – 12	20. Prepare and distribute announcement about new ED				• Email, newsletter, press release • Circulate provincially
TIMING TBD [3 to 6 months]	21. Onboard new ED to organization and HIV sector				• HIV Resources Ontario Sector Orientation

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APPENDIX G: Executive Director Job Description Template

To complete this template, begin by plotting the information from your existing Executive Director job description into the template. Then, revise and add information until all sections of the template has been filled in.

JOB TITLE	Executive Director	REVISION DATE	
DEPARTMENT		**LOCATION**	
REPORTING TO			

ROLE SUMMARY
In two or three sentences, describe the primary purpose, or the most important results of the job.

MAJOR RESPONSIBILITIES
Provide brief statements of the duties and/or responsibilities that take up at least 5% of the job's time and indicate the approximate percentage of time spent on the duty/responsibility. Total percentage of time should not exceed 100%. List in order of importance (from most to least important).

Responsibility/Duty	% of Time

QUALIFICATIONS & SKILLS
List the qualifications that are required by the job. This may include:
Values (e.g. anti-racism and anti-oppression, sex positivity, harm reduction, etc.)
Technical qualifications (e.g. credentials, proficiency with specific systems/software applications, etc.)
Behavioral qualifications (e.g. soft skills, leadership skills)
Other skill qualifications required by the job (e.g. negotiation skills, mathematical skills, etc.)

Values	Technical Qualifications
Behavioural Qualifications	**Other Skill Qualifications**

EDUCATION AND EXPERIENCE
Identify the minimum education and experience level required for the job.

Experience	Education

OODP

	WORKING RELATIONSHIPS Identify the requirement to contact and communicate with others both internally and externally. Indicated the purpose and nature of communication and frequency.	
	Who	**Purpose/Nature of Contact**
Internal	Board of Directors Employees Clients/ Service Users Volunteers/ Student Placements	
External	Funders/ Donors Other Executive Directors Community Partners Vendors Community Members	

ORGANIZATION STRUCTURE	
Who You Report To	
Positions Reporting Directly To You	

ADDITIONAL COMMENTS

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