



SUCCESSION PLANNING



Summary

SUCCESSION PLANNING

Neighborhood Academy has three digital resources to help your organization with an Emergency Succession Plan: The emergency backup plan, a calendar of annual events and milestones, and an asset inventory.

These templates are designed to be customized by your organization and uploaded to your association's web- or cloud-based drive and/or communally shared.

Emergency backup plan template:

Use this template to guide your association's organization through times of leadership transition. The guide template helps your board to create a plan for maintaining operations, services, and programs as well as defining your communications, policy, and practices with sudden or unexpected leadership changes. The highlighted sections serve as placeholders for your own custom information.

Calendar of annual events and milestones template:

Use this template to list all your neighborhood association's annual milestones and events to see at-a-glance what your board's focus will be during a time of transition.

Asset inventory template:

Use this template to list all your neighborhood association's owned and borrowed assets, including key information like location, serial numbers, model numbers, quantities, and more.

Download all templates: cityoftulsa.org/neighborhoodacademy



Annual Event and Milestone Calendar

In your succession planning, use this template to list all of your neighborhood association's annual milestones and events to see at-a-glance what your board's focus will be during a time of transition.

Great items to note: Signature Events, Awards Ceremonies, Contract Renewals, Web Domain Renewal, Report Due Dates, Board Elections, Board Retreat or Annual Meeting, Board Meetings, Funding/Grant Deadlines, Government/Tax Filing Deadlines, and Important Anniversaries (for ex. 50th anniversary of your neighborhood).

Month	Events, Milestones, and Tasks
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Sample
SUCCESSION PLANNING



Annual Event and Milestone Calendar

**Pleasantville Neighborhood Association
 Annual Event and Milestone Calendar**

Month	Events, Milestones, and Tasks
January	<ul style="list-style-type: none"> • Lowe’s grant application deadline • Board retreat
February	<ul style="list-style-type: none"> • Sweetheart Ice Cream Social • Board meeting
March	<ul style="list-style-type: none"> • File taxes • Sample family foundation donation request due • Board meeting • Keep Oklahoma Beautiful request due (for Pocket Park cleanup)
April	<ul style="list-style-type: none"> • Board meeting • Neighborhood-wide garage sale (Saturday and Sunday) • Neighborhood Pocket Park Cleanup
May	<ul style="list-style-type: none"> • Volunteer Thank You Dinner • Board meeting
June	<ul style="list-style-type: none"> • Lowe’s grant implementation deadline • Board meeting
July	<ul style="list-style-type: none"> • Board meeting • Summer Block Party
August	<ul style="list-style-type: none"> • Back to School Backpack Drive • Board meeting
September	<ul style="list-style-type: none"> • Lowe’s grant report due • Board meeting
October	<ul style="list-style-type: none"> • Trick-or-Treat Halloween Block Party • Web domain renewal • Board meeting
November	<ul style="list-style-type: none"> • Thanksgiving Food Drive • 25th Anniversary of Pleasantville Neighborhood Association • Board meeting (short) + Food Bank volunteering (remainder)
December	<ul style="list-style-type: none"> • Board elections (Vice President, Treasurer) • Board meeting (short) + holiday party (remainder) • Winter Coat Drive



Succession Readiness Checklist

A neighborhood association should determine what elements below are lacking in its current operations and then create a succession plan that prescribes activities and timelines for filling the gaps. The neighborhood association's organization is then ready for leadership transitions, foreseen and unforeseen.

Check each item below that your organization has in place. At the bottom, tally up your score to see your organization's current level of risk.

<input type="checkbox"/> Yes	<input type="checkbox"/> No	A strategic plan is in place with goals and objectives for the neighborhood for the near term (1-3 years). Including objectives for board officer development and recruitment.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The board, based on its annual self-evaluation, is satisfactorily performing its major governance jobs – financial oversight, executive support and oversight, and strategic planning.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	More than two board members share important external relationships (major donors, funders, partners, community leaders, etc.) maintained by the neighborhood association.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The board officers and committee chairs have a strong organizational culture in place in which members support one another and can reach decisions as a group efficiently and harmoniously.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The board officers and committee chairs share leadership of the organization with the full neighborhood association membership. The full membership has significant input on all major decisions.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The board officers and committee chairs can lead the organization in the absence of the board president.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The board officers and committee chairs have authority to make and carry out decisions within their respective areas of responsibility.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	A financial reserve is in place with a minimum of three months' operating expenses.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Financial systems meet industry standards. Financial reports are up to date and provide the data needed by the board and officers responsible for the association's financial strength and viability.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Operational manuals exist for key administrative systems and are easily accessible and up to date.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Board officers and committee chairs have documented their key activities in writing and have identified another board or committee member who can carry their duties in an emergency.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Board elections are held at regular intervals and are staggered to avoid losing institutional knowledge, skills, and involvement all at once.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	The board reviews the organization's governing documents and policies annually, making changes and amendments as needed.



Succession Readiness Checklist

<input type="checkbox"/> Yes	<input type="checkbox"/> No	An events and milestones calendar exists and is easily accessible and up to date.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	An asset inventory for the association exists and is easily accessible and up to date.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Association documents, files, records, and important data are backed up in multiple formats and locations (cloud or web-based storage and physical storage).

_____ Number of **Yes** answers

Current Level of Risk Chart

