

Succession Planning Worksheets
Intentionality In Planning

<p>What is the vision for our succession and transition processes?</p> <p>Transparency</p> <p>Agency</p> <p>Other</p>	<p>What's been our transition history? What are aspects we need to be aware of? Address issues that came up in prior transitions?</p> <p><input type="checkbox"/> Difficult</p> <p><input type="checkbox"/> Mixed</p> <p><input type="checkbox"/> Good</p>
<p>Succession Costs:</p> <p>Goodbye celebration \$ _____</p> <p>Rectory refurbishing \$ _____</p> <p>Search committee costs \$ _____</p> <p>Moving & Start Up costs \$ _____</p> <p>Welcoming new rector \$ _____</p> <p>Competitive salary differential \$ _____</p> <p>Other: \$ _____</p>	<p>Areas of General Health in the Congregation:</p> <p>Overall Satisfaction</p> <p>Overall Energy</p> <p>Conflict management</p> <p>Governance</p> <p>Education/formation</p> <p>Hospitality</p> <p>Pastoral care</p> <p>Worship and music</p> <p>Adaptability</p>
<p>Ministries we do not want to suffer throughout the transition:</p>	<p>How will we transfer assets? (What do you want the arriving rector to know?)</p> <p>What information needs to be shared?</p> <p>Who will take the lead in sharing it?</p> <p>How will it be shared?</p> <p>Programs, Pastoral, Administrative, Worship, Personnel, etc.</p>

<p>How do we describe our culture:</p>	<p>What values will guide our 'release' of our rector?</p> <p>Vision abundance</p> <p>Create Capacity</p> <p>Fight anxiety</p>
<p>Who are the key players during this succession/transition time?</p> <p>Departing Rector</p> <p>Wardens</p> <p>Transition Team Leader(s)</p> <p>Search/Call Committee Leader(s)</p> <p>Diocesan Consultant</p> <p>Other staff members</p> <p>Others</p>	<p>What values will guide the start up of our next rector?</p> <p>Honor the Predecessor</p> <p>Building on congregational health and strengths</p> <p>Complete the past</p>

Sample Succession Planning Checklist

- ✓ Succession vision
- ✓ Data – organizational intelligence (use of an assessment tool such as the *Congregational Assessment Tool*); financial review; physical plant audit; spiritual resources
- ✓ Identify key players
- ✓ Leadership training that may be needed
- ✓ Issues that require healing or conflict mediation
- ✓ Administrative issues
- ✓ Identification of the areas of congregational health and strengths
- ✓ Personnel – attention to remaining staff; issues; retention
- ✓ Engaging the entire congregation in the succession process
- ✓ Transition team to support out-going rector and family
- ✓ Celebration and goodbye
- ✓ Communication plan
- ✓ Job description for the incoming/next rector

- ✓ Selection of search committee chair(s), members and chaplain
- ✓ Data collection for the creation of the parish profile
- ✓ Spiritual disciplines
- ✓ Congregation's mission and vision reaffirmation or renewal
- ✓ Scope of the search process
- ✓ Critical skills and abilities requirements for next rector (vital leader profile)
- ✓ Compensation parameters
- ✓ Diocesan requirements and policies
- ✓ Candidate pool
- ✓ Background checks
- ✓ Interview structure and process
- ✓ Process for final approval of selected candidate

- ✓ Relocation logistics
- ✓ Welcome activities for next rector
- ✓ Internal and external communications
- ✓ Asset transfer
- ✓ Orientation to operations
- ✓ Transition team support
- ✓ Key introductions internal to congregation and external in the community
- ✓ Three-six month plan
- ✓ Any unique training needs (IT, phones, etc.)