

Succession Planning

Securing the Mission Beyond the Moment

Succession Strategies for Nonprofits
February 2026

What we'll cover today:

- Introductions
- Succession Planning: Why It Matters
- Types of Succession Planning
 - ✓ Board
 - ✓ Executive Director
 - ✓ Staff/Volunteer
 - ✓ Emergency
- Sharing & Wrap Up

Introductions

- Who are we?
- What brought us here today?

About Us

BoardWalk Consulting is a national executive search firm that specializes in recruiting CEOs and senior leaders for nonprofits and foundations. Every search is unique, but our approach is consistent, delivering leaders ready to make a difference.

Sarah Gaines is a Director with BoardWalk Consulting. She has had two career tracks which inform each other: nonprofit administration and executive search. Sarah finds fulfillment in working with boards in securing the mission beyond the moment.



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Why Succession Planning Matters

- Sustainability: securing the mission beyond the moment
- For staffed and volunteer-run organizations alike
- Mitigates risk of burnout, founder syndrome, and emergency gaps
- Legal and operational implications

Succession Planning

TYPE	WHO IT INVOLVES	WHEN IT APPLIES
Board	Officers, members, supported by staff	Ongoing; bylaws, recruitment
Executive Director	Board responsibility	Ideally planned, sometimes sudden
Staff & Volunteers	ED responsibility	Career development, overlap, cross training
Emergency	Everyone – Board chair and ED especially	Unplanned leaves or crises

Building the Board for Tomorrow

Read the bylaws and use terms to support renewal

Consider

- What skills and perspectives are missing now?
- What will you lose? What could you lose?

Respond

- Develop emerging leaders: who is here now?
- Recruit for current and future needs: who can you invite in?

Executive Director

Hiring, evaluating, supporting = key board responsibility

- Understand organizational mission, vision, and goals
- Support building internal capacity
- Consider options at time of transition:
 - Internal/limited search: Is the right leader already there?
 - Interim: Do you need time? Do things need fixing?
 - Retained search: How would outside support strengthen the process?

Staff and Volunteers

Executive Director responsibility; board can support

- Identify critical roles and cross-training
- Support professional development beyond narrow scope
- Document key processes and institutional knowledge
- Make retention part of succession planning

Emergency Planning

What happens if something happens?

- **People:** Who holds key relationships?
- **Things:** What and where are the key accounts, systems, facilities?
- **Expectations:** What's the protocol for interim authority?

Investing in emergency planning helps with all succession planning.

Sharing & Wrap Up

- Where are you most vulnerable?
- What could you address now?
- Who needs to be part of the conversation?

Thank you!

For more information, visit www.boardwalkconsulting.com