**SUCCESSION PLANNING:**



**LIST OF RESOURCES FOR INCOMING**

**(ARCH)DIOCESAN & DISTRICT COUNCIL PRESIDENTS**

**Required Reading:**

1. The Rule
2. Bylaws
3. Standards of Excellence for Councils
4. *Council President* manual
5. *Governance: Council/Board* manual
6. Annual budget
7. Year-end financials for the previous 3-4 years
8. Legal documents (e.g., 501(c)(3), 990 tax forms, etc.)

**Recommended Reading:**

1. Job description
2. National mentoring program materials
3. *Council President and Executive Directors: Process for a Successful Partnership* document
4. Minutes from regional, midyear and national meetings (at least one year)
5. Minutes from (arch)diocesan or council board meetings (at least one year)
6. *A Vincentian Guide to Diversity/Multicultural Issues*
7. Governance-in-a-Box

**Recommended Activities for President-Elect During Transition Period[[1]](#footnote-1):**

1. Participate in national mentoring program.
2. Observe local board meetings.
3. Meet with current president to discuss (arch)diocesan or district council operations on a monthly basis.
4. Meet with current president to discuss activities at regional, midyear and national meetings.
5. Attend regional, midyear and/or national meetings.
6. Attend Invitation for Renewal retreat.
7. Meet with current president and regional vice president (in person if possible).
8. Meet with national council member.
9. Include past president as ex-officio member of your future board and council.
10. Complete *Values-Centered Leadership Course* (online) at DePaul University.

1. *Assumes a six-month overlap with president and president-elect.* [↑](#footnote-ref-1)