



Partnership for Philanthropic Planning Council Leadership Transition Tools

Leadership Orientation “Binder”

- Be sure to determine who is responsible for updating and housing this information.

Table of Contents (suggested—to be adapted by individual councils)

Section 1: People

- Board and Committee Contact Information
- Membership information (lists of new members, VIPs, etc.)
- Prospect list (individuals and partners)
- Community Partner Contacts and Agreements
- Funder/Sponsor/Donor Contacts
- Press Contacts

Key Contacts Worksheet

Name/Position	Contact Info	What They Do	What’s Next?
			<ul style="list-style-type: none"> • Be sure to introduce these people to new leaders.
			<ul style="list-style-type: none"> • Be sure to notify other council leaders of changes to contact names and keep contact info up to date.
			<ul style="list-style-type: none"> • If contact info is maintained electronically, plan ways to share it between platforms.

Section 2: Documentation and Methodology

- Strategic Plan or other statement of ends policies/goals
- Short term objectives with prioritization and delegation

- Information about grants, including reporting requirements
- Copies of general correspondence
- Copies of general press coverage
- Bylaws and Articles of Incorporation
- 990s and other tax information
- Job Descriptions (board, administrator, committee chairs, etc.)
- Copies of executed contracts (meeting space, catering, etc.)

Section 3: Key Initiatives

- Plans and timelines
- Copies of contracts related to specific initiative
- Copies of press coverage
- Evaluation survey results
- Debriefing and notes on plans for future events

Section 4: Member Recruitment

- List of key individual prospects and contact assignments
- Membership brochures, flyers, etc.
- Brief history of past efforts

Recruitment Strategy Worksheet

Prospect Group	Contact Info	Recruitment Method	Results	What's Next?
				<ul style="list-style-type: none"> • Be sure to introduce these people to new leaders. • Be sure to notify other council leaders of changes to contact names and keep contact info up to date. • If contact info is maintained electronically, plan ways to share it between platforms.

Section 5: PPP Relationship

- 501(c)(3) election paperwork
- Contact information and job description for council's PPP liaison
- ICDMS reports
- Record of council contributions to PPP

Section 6: Personal Notes and Observations

- What worked
- What didn't work
- Challenges

Challenges Worksheet

Category	Description	Actions Taken
Personal		
Governance		
Member Recruitment/Retention		
Partnerships		
Add other categories as necessary		