

Superintendent Succession Planning Checklist

Plan for the future... and prepare for the unexpected

Unexpectedly losing a superintendent can significantly disrupt district operations. A strong succession plan prepares your organization to respond quickly, maintain leadership continuity, and support the success of both staff and students. But the most effective succession planning considers both the near-term and the longer term.

When a superintendent suddenly departs, emergency succession planning provides a written plan that clarifies for the board, school staff, and families which staff members own key interim responsibilities and which staff members temporarily report to the board.

When a superintendent communicates that they're near the point of retirement or a career change, a long-term talent development strategy helps ensure that the organization has in place policies and practices to build the next generation of leadership. This strategy can be as specific as agreement on a future successor for the superintendent and a timeline for the transition, or a more general planning process to identify potential candidates who might ultimately be a fit for the role.

This checklist can help you put both in place so you're ready for whatever comes next.

Emergency Succession Plan



1. Draft Your Plan

- Review and, if necessary, update the superintendent's job description
- List major responsibilities by category with additional notes on key pieces, if warranted



2. Determine Interim Staffing

- Determine how best to divide the responsibilities, by category, among existing senior staff (ideally among no more than 2-3 people)
- Identify any individual skills gaps that may need to be addressed
- Create personalized development plans to address them
- Plan to involve interim staff in key meetings and tasks (e.g., board meetings, community sessions, etc.) to facilitate knowledge transfer



2. Finalize & Share

- Share the Emergency Succession Plan draft with the superintendent support committee (if applicable)
- Make any necessary revisions and submit the plan to the full board for approval
- Share the approved plan with senior staff
- Communicate potential interim roles to those who may be asked to fill them
- Schedule annual reviews of the plan to ensure it stays current



Long-Term Talent Development Succession Strategy

1. Lay the Groundwork

- Assign a board committee or task force to oversee the succession planning process
- Review the current superintendent's contract terms, retirement plans, or potential exit timelines
- Ensure board leadership maintains a strong partnership with the communications team, with clear processes in place to support consistent, transparent messaging and uphold public trust
- Include the evaluation and potential use of search firms in advance so the board is prepared to act quickly and confidently if external support is needed during the search process



2. Analyze District Goals and Desired Leadership Profile

- Identify the knowledge, skills, experience, and leadership qualities needed in a future superintendent based on district priorities
- Continually solicit input from key stakeholders (e.g., community members, staff, administrators) to define leadership needs and expectations



3. Examine Internal Talent and Develop a Talent Pipeline

- Evaluate existing administrators' skills, shortcomings, retirement timelines, and potential for growth to identify potential internal candidates and talent gaps
- Invest in leadership development programs for high-potential internal candidates
- Offer key leaders interim responsibilities or mentorship to prepare for potential succession



4. Monitor and Evaluate

- After any transition, conduct a board review to evaluate what went well and what could be improved
- Update the succession plan based on lessons learned and district changes
- Monitor internal candidate growth and leadership development program effectiveness



Keep your board organized and on track with our **school board management software**.

[See how it works here](#) or scan the QR code.

