



CEO Transition Checklist

Strategic Alignment			
	Complete	In Progress	Not Started
Our co-op has an up-to-date strategic plan that defines our future direction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership needs are clearly aligned with the strategic plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have identified the critical roles and skills required for the next 5–10 years.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Succession Planning			
	Complete	In Progress	Not Started
A formal succession plan exists and is reviewed annually.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Potential internal successors have been identified and evaluated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High-potential employees are actively developing competencies for leadership roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A leadership competency model is used to assess and prepare talent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Bench strength is sufficient for critical leadership positions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Governance & Policy			
	Complete	In Progress	Not Started
Board has approved policies for CEO succession and leadership transitions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A CEO job description and position criteria are current and documented.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delegation of authority and key decision responsibilities are well-defined.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policies for search and selection, relocation, and CEO compensation are in place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Management			
	Complete	In Progress	Not Started
The board and leadership team are aligned on transition plans.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



A communication strategy exists to inform staff, members, and stakeholders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The CEO is actively preparing the co-op for this change and is prepared for the emotional impact of transition.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Knowledge Transfer & Operations			
	Complete	In Progress	Not Started
Key co-op knowledge is documented and accessible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentoring or shadowing opportunities are in place for potential successors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processes exist to ensure continuity and minimize disruption during transition.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compensation & Retention			
	Complete	In Progress	Not Started
Compensation and recognition strategies are aligned with succession goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Retention tools (e.g., deferred comp, stay bonuses) are in place for top talent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timing & Preparedness			
	Complete	In Progress	Not Started
CEO and board have discussed retirement timelines and transition options.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estimated timelines are clear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepared for impact of leadership changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>