

A decorative border on the left and bottom of the slide. It features a green vine with gold-colored highlights, curling upwards and then extending horizontally. The vine is adorned with several purple, five-petaled flowers and green leaves.

What Happens Next . . .

ensuring center stability during change.



In Loving Memory of

Larry Leas

September 1, 1950 - February 12, 2024

2:00 PM
February 18, 2024

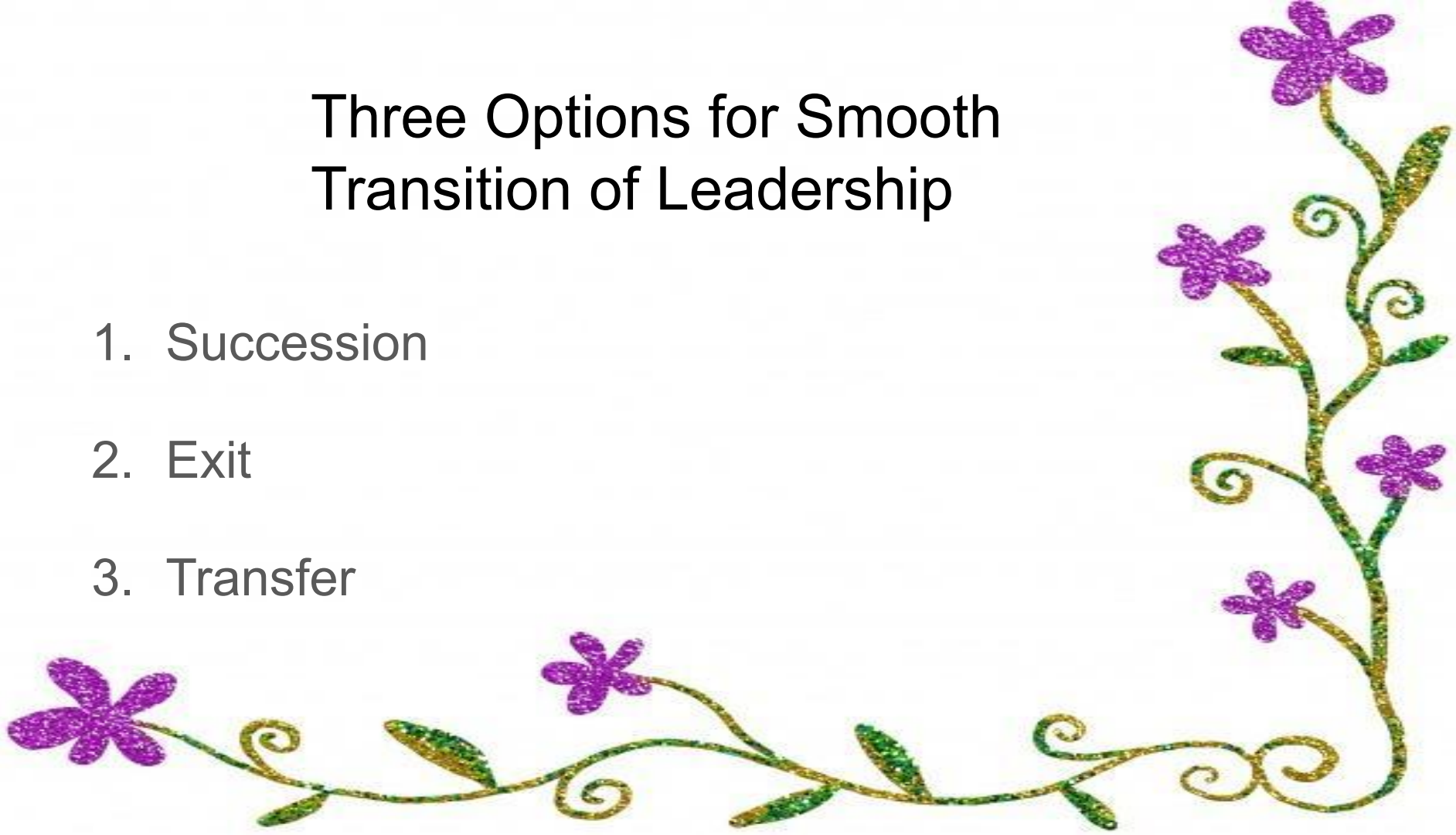
Heafey Hoffmann Dworak Cutler Mortuaries
7805 West Center Road
Omaha, Nebraska 68124



Change is
inevitable

Three Options for Smooth Transition of Leadership

1. Succession
2. Exit
3. Transfer



Things to understand before we begin . . .

Nonprofits are owned by the public.

Board members accept certain legal liabilities & responsibilities.

Failure to distinguish between organizational & personal assets creates problems.

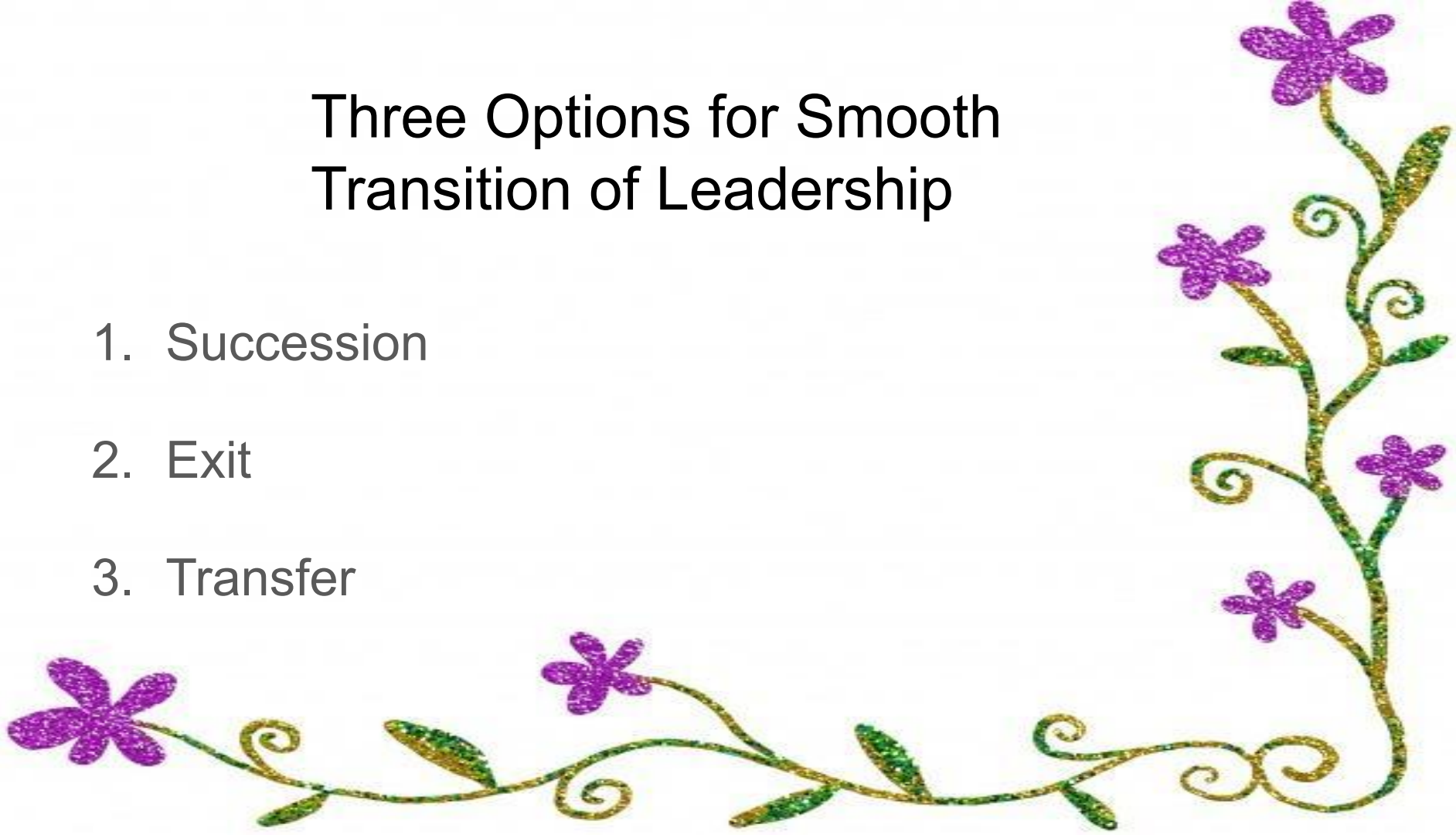
Plans for the future do not limit today's success.

Transitions are Stressful and People are unpredictable.

Others will be negatively impacted without a plan.

Three Options for Smooth Transition of Leadership

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NOTIFICATIONS

VARIETY

LONG-TERM

DETAILED

PERMANENT

DEFINE

TEMPORARY

SHORT-TERM

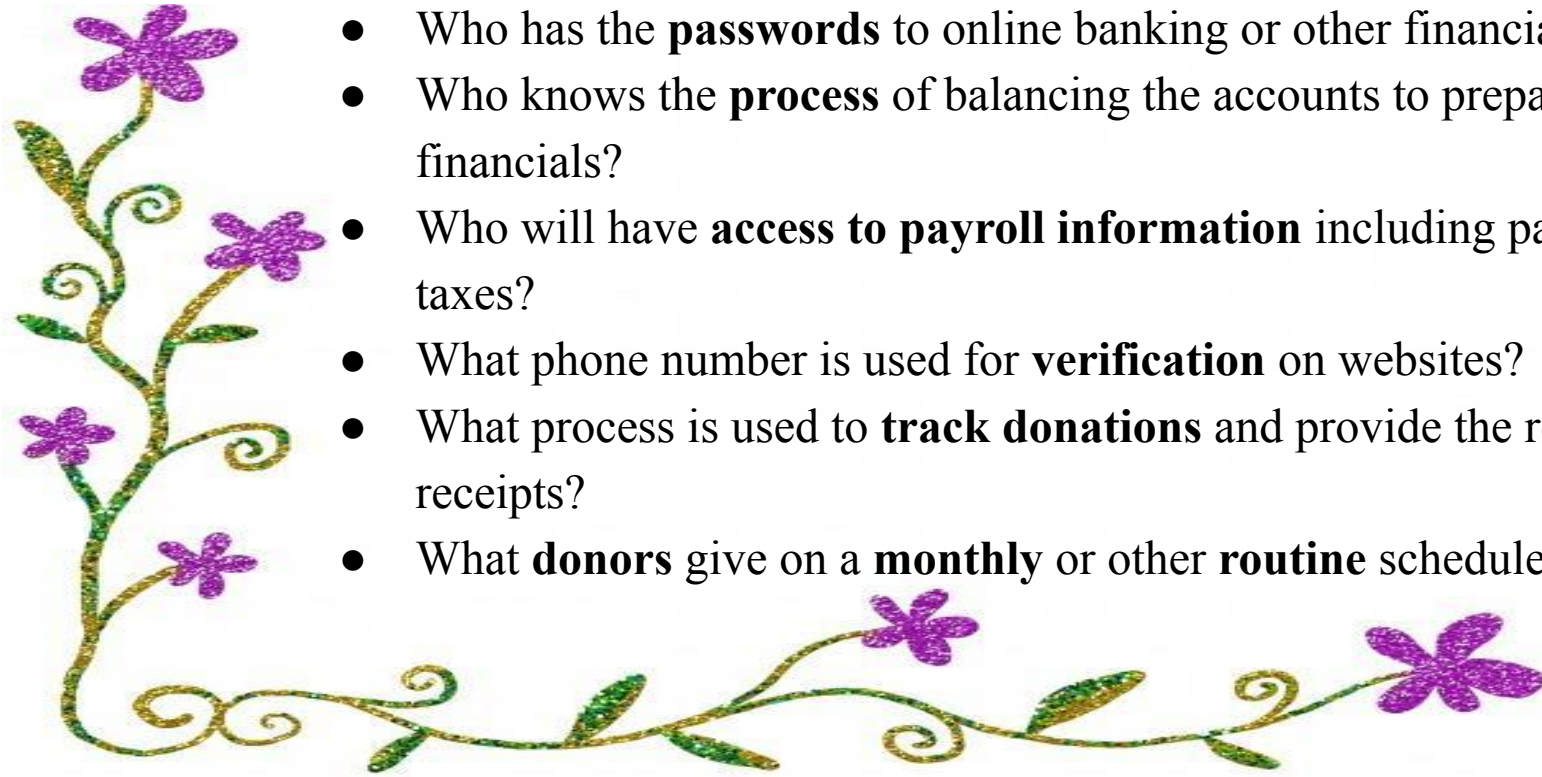
POSITIONS

TIME FRAME

DUTIES

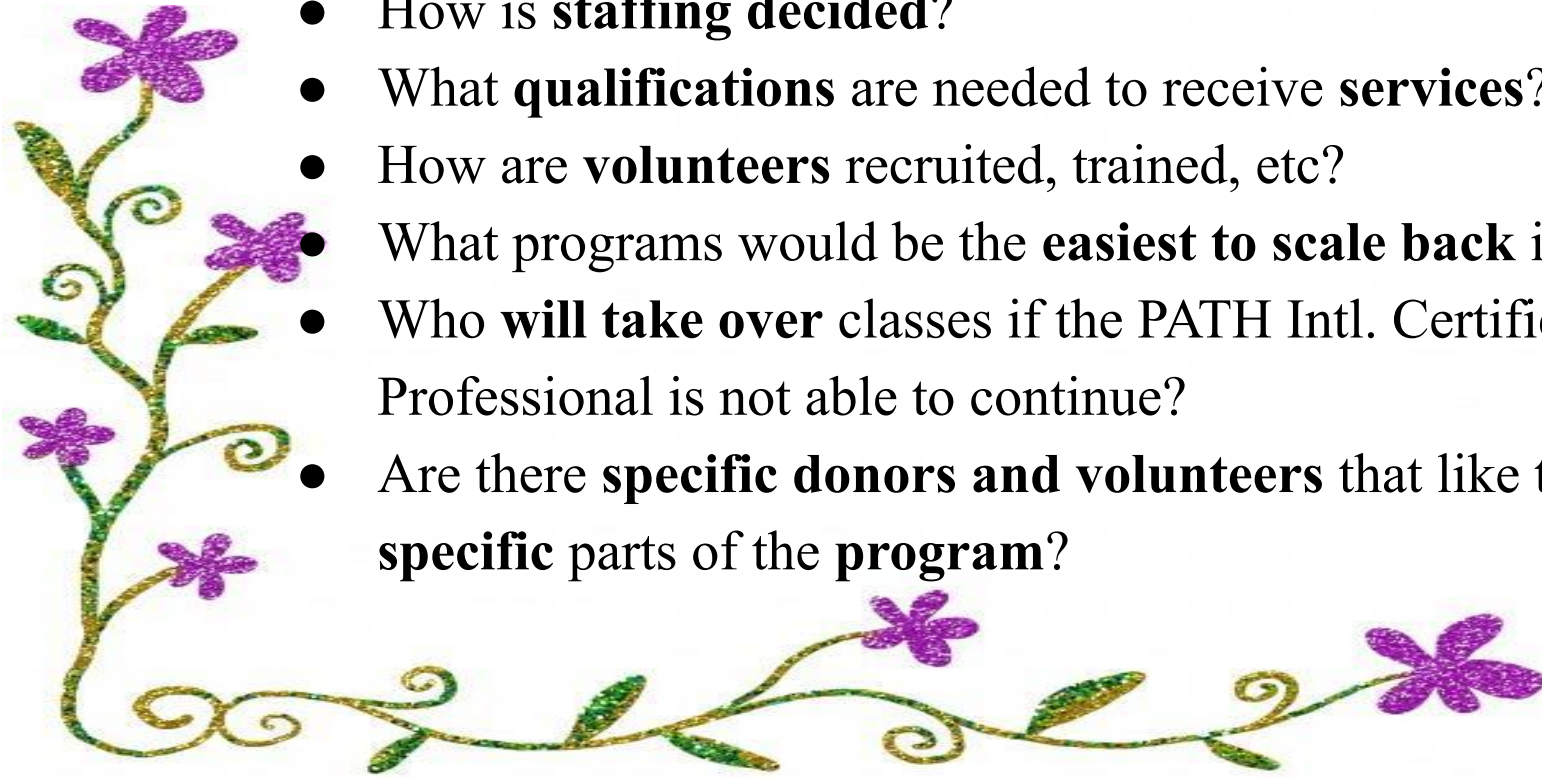
Financial

- Who will be able to **access the account information**?
- Who will be able to **authorize** money to be released from the account?
- Who has the **passwords** to online banking or other financial websites?
- Who knows the **process** of balancing the accounts to prepare monthly financials?
- Who will have **access to payroll information** including payment of payroll taxes?
- What phone number is used for **verification** on websites?
- What process is used to **track donations** and provide the required tax receipts?
- What **donors** give on a **monthly** or other **routine** schedule?



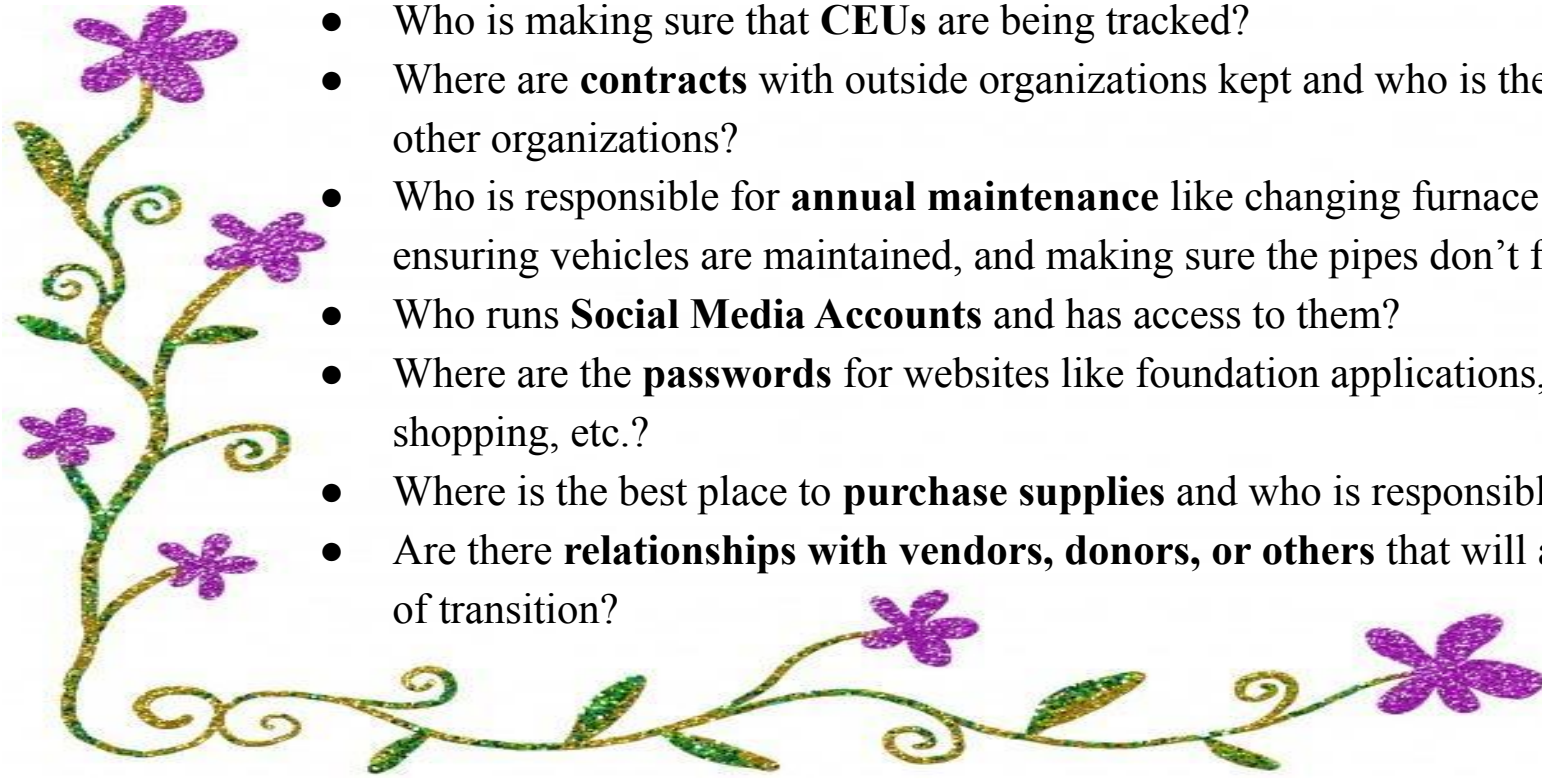
Programs

- Does your **mission statement** reflect the services you provide?
- How is **staffing decided**?
- What **qualifications** are needed to receive **services**?
- How are **volunteers** recruited, trained, etc?
- What programs would be the **easiest to scale back** if needed?
- Who **will take over** classes if the PATH Intl. Certified Professional is not able to continue?
- Are there **specific donors and volunteers** that like to **support specific** parts of the **program**?



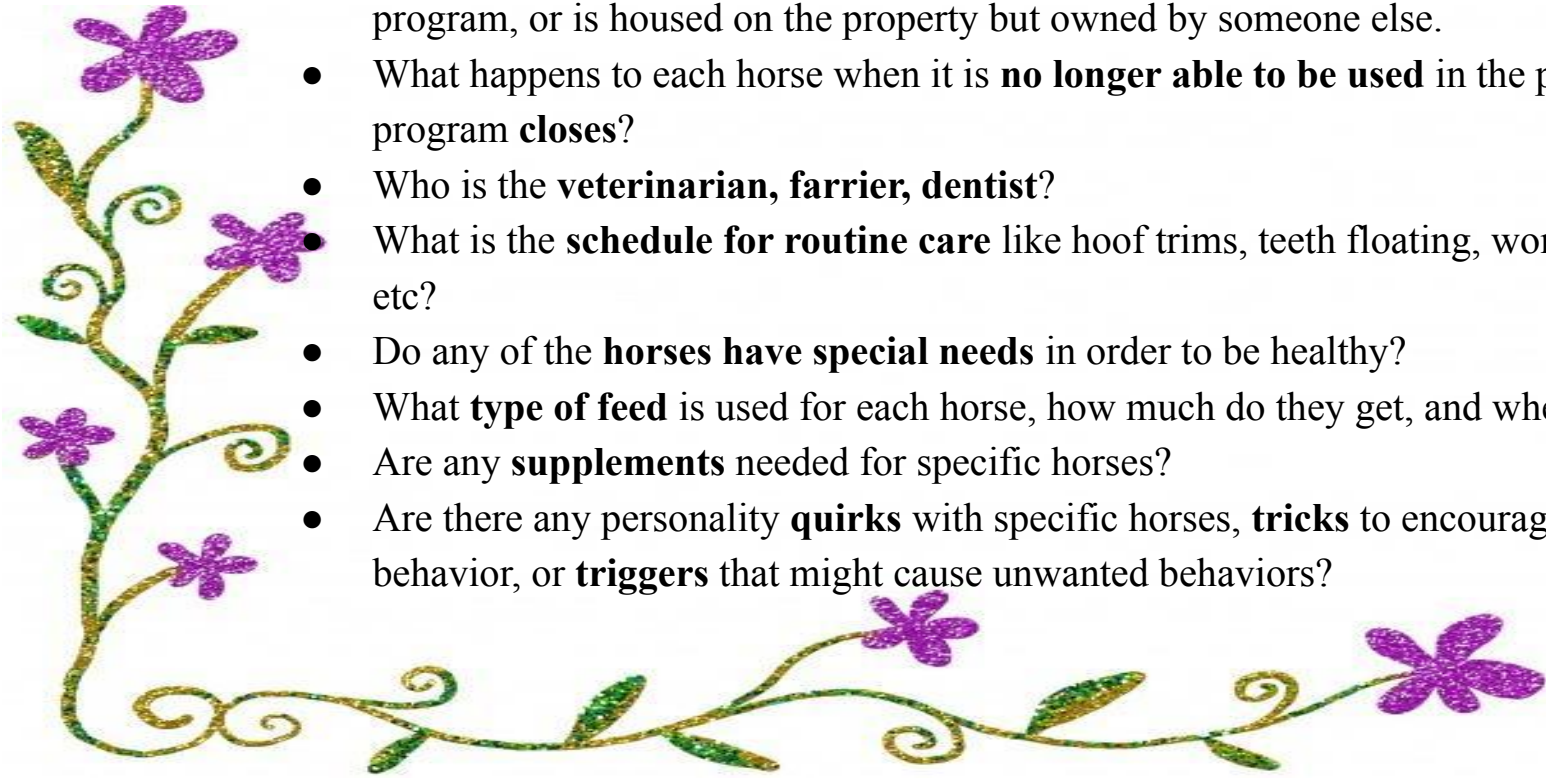
Administration

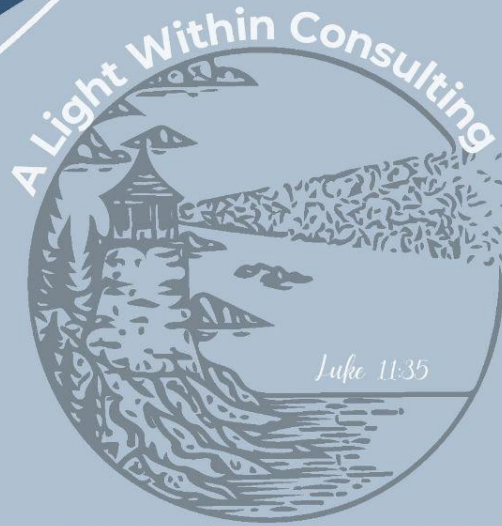
- Who is your **insurance** contact, where is the policy, and when does it renew?
- When are your **PATH Intl. credentials** due for renewal?
- Who is making sure that **CEUs** are being tracked?
- Where are **contracts** with outside organizations kept and who is the contact at other organizations?
- Who is responsible for **annual maintenance** like changing furnace filters, ensuring vehicles are maintained, and making sure the pipes don't freeze?
- Who runs **Social Media Accounts** and has access to them?
- Where are the **passwords** for websites like foundation applications, online shopping, etc.?
- Where is the best place to **purchase supplies** and who is responsible?
- Are there **relationships with vendors, donors, or others** that will assist in times of transition?



Equines

- Who **owns** each horse?
- Where is the **paperwork** to prove if the horse is owned by the nonprofit, on loan to the program, or is housed on the property but owned by someone else.
- What happens to each horse when it is **no longer able to be used** in the program or the program **closes**?
- Who is the **veterinarian, farrier, dentist**?
- What is the **schedule for routine care** like hoof trims, teeth floating, worming, vaccines, etc?
- Do any of the **horses have special needs** in order to be healthy?
- What **type of feed** is used for each horse, how much do they get, and where do you buy it?
- Are any **supplements** needed for specific horses?
- Are there any personality **quirks** with specific horses, **tricks** to encourage the desired behavior, or **triggers** that might cause unwanted behaviors?





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