

Name _____

EXECUTIVE DIRECTOR LEGACY STATEMENT

PART I

An important step in executive transition planning includes having the Executive Director reflect upon his/her role in achieving key organizational accomplishments or milestones.

Reflecting on your tenure as Executive Director, list the three accomplishments you are most proud of and explain why:

Write Them Down

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How would you like to be remembered by organizational members and the community you serve?

Example:

- A visionary leader, a coalition builder, a consensus builder, an innovator, someone who could effectively and genuinely engage everyone from politicians to low-income immigrant workers.

PART II

The legacy statement represents your personal vision and aspiration for what you wish to accomplish **organizationally and personally** before your final exit as the leader of your organization. The legacy statement speaks to the “results” you desire to achieve.

The idea is to “begin with the end in mind.” Imagine that you have made the decision to resign as leader. You are at your farewell party. Staff, friends, family, colleagues, are all present for your “send off.” The Board Chair of your organization comes up to the podium and says, “I’d like to commend our leader for the outstanding results she/he has achieved during as our Executive Director. He/she has achieved the following and leaves this legacy behind..... Take a moment to reflect on the legacy of outstanding results you hope to leave as your move on.

List Them

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PART III

Legacy – Statement

Once you have shaped and finalized your legacy, take a few moments to think on legacy actions/priorities. What can be done within the next _____ months to move you closer to achieving your legacy? For each legacy area, write three action steps that will move you closer to its realization.

1. Legacy area (results desired) _____

A) Legacy actions in next ____-months to work toward achieving results.

B)

C)

2. _____

A)

B)

C)

3. _____

A)

B)

C)

Adapted from HF Leadership Development Project