

## SAMPLE Leadership Agenda Template

This worksheet is intended to serve as a guide for developing the Leadership Agenda – priority areas for the new executive’s first twelve months of leadership. Ideally, this agenda is co-created between both the executive director and board chair. This document can be completed to align with the executive’s start period, with the organization’s fiscal year, or another designated 12-month period as deemed appropriate.

The following is an outline of ORGANIZATION’S priority areas for insert year including assumptions and top-level roles and responsibilities. This document was developed by ORGANIZATION’S Board Chair, Executive Director, and Transition Committee Chair on insert date and then reviewed and augmented by the Executive Committee on insert date.

To implement this leadership agenda, ORGANIZATION will advance the insert # of priority areas defined below. Each priority includes strategies, tactics, assumptions, staff/board responsibilities, and measures of success.

**Priority 1:** Insert statement.

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**Success defined:** Insert statement

**We will advance this priority through the following strategies and tactics:**

**Strategy 1:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

**Strategy 2:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

Executive’s/Staff’s Role	Board’s Role
<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>	<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>

**Priority 2:** Insert statement.

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**Success defined:** Insert statement

**We will advance this priority through the following strategies and tactics:**

**Strategy 1:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

**Strategy 2:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

Executive's/Staff's Role	Board's Role
<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>	<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>

**Priority 3:** Insert statement.

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**Success defined:** Insert statement

**We will advance this priority through the following strategies and tactics:**

**Strategy 1:** Insert statement.

- Tactic A
- Tactic B

- Tactic C

**Strategy 2:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

Executive's/Staff's Role	Board's Role
<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>	<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>

**Priority 4:** Insert statement.

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**Success defined:** Insert statement

**We will advance this priority through the following strategies and tactics:**

**Strategy 1:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

**Strategy 2:** Insert statement.

- Tactic A
- Tactic B
- Tactic C

Executive's/Staff's Role	Board's Role
<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>	<ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>