Beyond the Succession Plan

SEVEN-QUESTION SUCCESSION READINESS CHECKLIST | NONPROFIT STATEN ISLAND · OCTOBER 22, 2026

Succession and transition readiness is not just about finding the next leader. Use these questions with your board and leadership team to examine the governance, leadership, knowledge, relationships, and culture that sustain your mission through change. Check each area your organization has addressed. Leave unchecked the areas that merit a conversation with your board and leadership team. This is a discussion starter—not a formal assessment or score.

☐ **1. Governance and board support**

Does our board understand its role before, during, and after transition—including how to support, empower, and evaluate a new leader?

☐ **2. Continuity and interim authority**

If our CEO/ED were suddenly unavailable, do we know who would lead, which decisions they could make, and how we would communicate?

☐ **3. Leadership capacity and authority**

Are we developing leaders across the organization—and giving them responsibility *and* the authority, coaching, and support to succeed?

☐ **4. Knowledge and relationships**

Are essential systems, decisions, and stakeholder relationships shared and documented, rather than concentrated in one person?

☐ **5. Culture and adaptability**

Can staff raise concerns and contribute to change while adapting to new leadership, expectations, and ways of working?

☐ **6. Legacy and room to lead**

Can we honor a departing leader's contributions while giving a successor genuine space and authority to lead differently?

☐ **7. Ongoing organizational readiness**

Do we regularly revisit leadership continuity, board succession, organizational culture, and risk—not only when departure is imminent?

One conversation. One action.

Which area needs the most attention? _____

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One action for the next 90 days: _____

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Practical resources

- BoardSource: Executive Transition and Succession Planning — https://boardsource.org/fundamental-topics-of-nonprofit-board-service/executive-transition/
- National Council of Nonprofits: Succession Planning — https://www.councilofnonprofits.org/running-nonprofit/governance-leadership/succession-planning-nonprofits-managing-leadership
- Bridgespan: Nonprofit Succession Planning — https://www.bridgespan.org/events-webinars/webinar-nonprofit-succession-planning
- BoardSource: Board-Staff Partnership — https://boardsource.org/fundamental-topics-of-nonprofit-board-service/board-staff-partnership/