



# Succession Planning Starting Questions

A GOOD, SIMPLE, COMMUNICATED CONTINGENCY PLAN IS FIRST. TO GET STARTED, ANSWER THESE QUESTIONS:

1. Who takes the lead?

a. What are the decision-making parameters?

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b. How much money can be spent?

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2. When, what, and to whom do we communicate?

a. Organization

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b. Donors

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c. Family

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d. Insurance—should you have it?

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e. Constituents

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f. Bank

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g. Others?

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3. What about the organization?

a. Who is in charge?

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b. Will we pay them extra?

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c. How do we communicate?

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d. Is there an interim leader?

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e. Do we start a search?

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f. How is the search to be paid for?

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4. What about the family?

a. Do they know?

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b. What can be done to ease the pain?

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