



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?

b. How much money can be spent?

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

a. Organization

b. Donors

c. Family

d. Insurance—should you have it?

e. Constituents

f. Bank



g. Others?

3. What about the organization?

a. Who is in charge?

b. Will we pay them extra?

c. How do we communicate?

d. Is there an interim leader?

e. Do we start a search?

f. How is the search to be paid for?

4. What about the family?

a. Do they know?

b. What can be done to ease the pain?
