

# Leadership Transition & Succession Planning Readiness Assessment

A practical checklist for nonprofit boards and executive leaders

## Why This Matters

Leadership transitions are inevitable. What isn't inevitable is whether your organization survives one — or thrives through one. The difference almost always comes down to preparation.

This assessment is designed for nonprofit boards and executive leaders who are ready to take an honest look at where they stand. Answer each question as truthfully as possible. There are no wrong answers — only opportunities to get stronger.

Use this as a conversation starter with your board, your outgoing leader, and your senior team. Then let's talk.

## How to Use This Assessment

For each item, check YES if it is actively in place, or NO if it is not yet addressed. At the end, tally your scores in each section to identify your highest-priority areas.

### SECTION 1: Emergency Transition Readiness

Can your organization function if a key leader left tomorrow — unexpectedly?

| STATEMENT  | YES                      | NO                       |
|--|--------------------------|--------------------------|
| We have a written emergency succession plan on file<br><i>Documents who steps in if the CEO/ED is suddenly unavailable</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| The board chair knows exactly what to do in the first 48 hours of an unplanned departure of the CEO/ED<br><i>Includes communications, key contacts, and legal/financial access</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| At least two people (besides the CEO/ED) have access to banking, payroll, and key vendor accounts  | <input type="checkbox"/> | <input type="checkbox"/> |
| Our organizational passwords, contracts, and donor relationships are documented and accessible   | <input type="checkbox"/> | <input type="checkbox"/> |
| We have identified an acting or interim leadership option should we need one quickly   | <input type="checkbox"/> | <input type="checkbox"/> |
| The board has discussed emergency succession scenarios in the past 12 months   | <input type="checkbox"/> | <input type="checkbox"/> |

Section 1 Score: \_\_\_\_ YES / \_\_\_\_ NO

## SECTION 2: Anticipated Transition Planning

Are you planning for a transition you can see coming?

| STATEMENT   | YES                      | NO                       |
|---|--------------------------|--------------------------|
| We have had an honest conversation with our CEO/ED about their future plans and timeline  | <input type="checkbox"/> | <input type="checkbox"/> |
| A departure date or general window has been discussed, even informally  | <input type="checkbox"/> | <input type="checkbox"/> |
| We have formed or plan to form a Succession Planning Committee  | <input type="checkbox"/> | <input type="checkbox"/> |
| We have a communications plan for how/when to share the transition news with staff, board, and the community  | <input type="checkbox"/> | <input type="checkbox"/> |
| We have conducted (or plan to conduct) a sustainability audit or organizational assessment to identify organizational strengths and vulnerabilities | <input type="checkbox"/> | <input type="checkbox"/> |
| We have identified the key external relationships the CEO/ED holds and have a plan to transfer/cultivate them                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| We have discussed what an advisory role for the departing leader might look like, if applicable   | <input type="checkbox"/> | <input type="checkbox"/> |
| We have set (or are preparing to set) an executive search strategy  | <input type="checkbox"/> | <input type="checkbox"/> |

Section 2 Score: \_\_\_\_ YES / \_\_\_\_ NO

## SECTION 3: Long-Term Succession & Leadership Pipeline

Is your organization building leadership capacity at every level?

| STATEMENT  | YES                      | NO                       |
|--|--------------------------|--------------------------|
| We have identified internal staff with leadership potential who could grow into senior roles           | <input type="checkbox"/> | <input type="checkbox"/> |
| We invest in professional development for middle management and emerging leaders                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Our board is actively engaged in governance (not just showing up) and is ready to lead a transition    | <input type="checkbox"/> | <input type="checkbox"/> |
| We have a strong, skilled management team that can operate independently from the CEO/ED               | <input type="checkbox"/> | <input type="checkbox"/> |
| We regularly assess the skills our organization will need 3-5 years from now                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Our organizational culture, values, and ways of working are documented — not just in the leader's head | <input type="checkbox"/> | <input type="checkbox"/> |
| We have built financial reserves that would support the organization during a leadership gap           | <input type="checkbox"/> | <input type="checkbox"/> |
| We have or are pursuing multi-year funding that reduces transition risk                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Our strategic plan is current and would guide new leadership effectively                               | <input type="checkbox"/> | <input type="checkbox"/> |

Section 3 Score: \_\_\_\_ YES / \_\_\_\_ NO

## SECTION 4: Board Readiness

Is your board equipped to lead your organization through transition?

| STATEMENT   | YES                      | NO                       |
|---|--------------------------|--------------------------|
| Our board understands its distinct role in a leadership transition vs. the staff's role           | <input type="checkbox"/> | <input type="checkbox"/> |
| We have a board member (or committee) with HR or executive search experience                      | <input type="checkbox"/> | <input type="checkbox"/> |
| The board has discussed what qualities and competencies the NEXT leader needs to have             | <input type="checkbox"/> | <input type="checkbox"/> |
| Our board is at full (or near-full) capacity with active, engaged members                         | <input type="checkbox"/> | <input type="checkbox"/> |
| The board has a clear process for making a hire and knows who has final decision-making authority | <input type="checkbox"/> | <input type="checkbox"/> |
| Our board-CEO/ED relationship is healthy and characterized by trust and open communication        | <input type="checkbox"/> | <input type="checkbox"/> |

Section 4 Score: \_\_\_\_ YES / \_\_\_\_ NO

## Understanding Your Score

|   |   |   |
|---|---|---|
| <b>Mostly YES</b><br>Strong foundation — keep building! | <b>Mixed Results</b><br>Prioritize your NO items now. | <b>Mostly NO</b><br>Let's talk. This is urgent. |
|---|---|---|

Every "NO" is a gap — and gaps become crises when leadership transitions unexpectedly. The good news? You can close these gaps. That's exactly what I help organizations do.

Whether you're facing a transition soon or just being smart about the future, I'd love to talk about what comes next for your organization.

## Ready to Turn Your NOs into YESes?

I'm Stacey Wedding, an advisor to nonprofits and BoardSource Certified Governance Consultant. I help nonprofits move from surviving to thriving — especially when a leader is heading for the door.



Plan Today.  
Thrive Tomorrow.  
Connect with us  
to start!