

Succession Plan Checklist



Practical, provocative, food
for thought for nonprofits

ED Job Description

Emergency Succession Plan

Document and Information Inventory

- Contact information for all employees
- Chart of all bank & brokerage accounts
- Location of all legal documents (i.e. bylaws, incorporation papers, tax letters)
- Location of donor lists
- Current calendar year outline with due dates
- List of significant stakeholders: community, association, & funder groups
- Computer passwords & any security questions for login

Communication Plan

- Immediate point person should something happen
- Liaison between board and staff
- Media contact
- Donor/funders contact
- Staff contact
- Recipients of physical copies of the plan

Designated Survivor

Does your plan do all of the following?

- Transform transitions into a more thoughtful process?
- Expand the culture & practice of leadership development to ensure inclusion & diversity?
- Safeguard & operationalize institutional knowledge?
- Sensitively manage potentially charged transitions?