

Succession Planning Questions

1. Can you describe how your organization approaches succession planning? How far ahead do you start planning for key leadership transitions?

- *Follow-up:* How has that timeline helped or hindered smooth transitions in your organization?

2. Has your organization experienced an unexpected leadership transition? How did having—or not having—a succession plan impact the outcome?

- *Follow-up:* What were the biggest challenges you faced during that time, and how did you address them?

3. What key roles in your organization do you consider critical to succession planning beyond just the executive director or CEO?

- *Follow-up:* How do you prepare for transitions in these roles?

4. How involved is your board in the succession planning process? What advice do you have for organizations that struggle to engage their boards in leadership transitions?

- *Follow-up:* Have you ever faced tension between board and staff when implementing a succession plan?

5. Can you share a story of when succession planning worked well in your organization? What were the key factors that made it successful?

- *Follow-up:* Was there anything you would have done differently looking back?

6. For organizations that may not have the resources for formal leadership development programs, what are some practical ways to build internal leadership capacity?

- *Follow-up:* Have you ever had to develop internal leaders on a limited budget, and how did that process go?

7. What role does communication play during leadership transitions? How do you manage messaging both internally with staff and externally with stakeholders?

- *Follow-up:* What was the most surprising feedback you received during your last leadership transition?

8. Succession planning is often seen as something to deal with when a crisis happens. How do you keep it on the radar as an ongoing strategic priority?

- *Follow-up:* What strategies have you found effective in keeping your succession plan updated and relevant?

9. How do you balance the need for continuity with the opportunity for change when new leaders come on board? Is there ever a tension between preserving the organizational culture and allowing new leadership to make changes?

- *Follow-up:* Have you ever seen this balance tip too far in one direction?

10. Looking ahead, what would you say are the biggest trends or changes in succession planning for nonprofits? How do you see these evolving in the next few years?

- *Follow-up:* Are there any practices or tools that you're thinking of adopting to improve succession planning in your organization?