

Annotated Reference for Succession Planning Tools: 2025 WVNPA Conference Attendees
Online: <https://bit.ly/WVNPA-SP> (case sensitive)

SUCCESSION PLANNING FOR NONPROFITS



WVNPA members: start HERE first! (WVNPA offers local state specific guidance)
<https://www.councilofnonprofits.org/running-nonprofit/governance-leadership/succession-planning-nonprofits-managing-leadership>



association / membership focused (not for health, human services, charitable)
<https://www.wildapricot.com/blog/nonprofit-succession-planning> (5 step guide)



Aly Sterling Philanthropy nonprofit consulting includes succession planning
<https://alysterling.com/nonprofit-succession-planning-checklist/>



Forbes: 20 Essential strategies when creating a nonprofit succession plan
More like common sense and not so common sense suggestions :

<https://www.forbes.com/councils/forbesnonprofitcouncil/2024/09/16/20-essential-strategies-when-creating-a-nonprofit-succession-plan/>



<https://missiondrivensearch.org/WVNPA-SP> **Succession Planning & Executive Search**
tailored for mission-driven small to medium community nonprofits (\$5-\$35M)

SUCCESSION PLANNING (FOR-PROFIT FOCUS BUT A NUMBER OF NONPROFIT APPLICATIONS)

Leadership Circle Outstanding for self-assessment and 360 degree feedback (limited nonprofit)



<https://leadershipcircle.com/free-self-assessment/>
<https://leadershipcircle.com/leadership-assessment-tools/leadership-circle-profile/>
(360 assessment feedback on individual executives)



Baywork Group 5 step self-assessment tool (public sector focus)
<https://www.baywork.org/wp-content/uploads/2016/06/Components-of-Successful-Succession-Plan-and-Use-of-Self-Evaluation-Process-FULL.pdf>



Sigma Assessment Systems Rich self-assessments and templates
<https://www.sigmaassessmentsystems.com/succession/>

<https://www.sigmaassessmentsystems.com/succession-planning-sprint> (30 days)
<https://www.sigmaassessmentsystems.com/succession/succession-planning-template-library/>
<https://rto9.ca/wp-content/uploads/2022/04/SIGMA-Simple-Succession-Planning-Guide.pdf>



UNIVERSITY of WASHINGTON

<https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf> **Higher ed focused but still helpful constructs**



Henman Group: succession planning for individuals, leadership, teams, board

<https://henmanperformancegroup.com/benchassessment/assessment/>
<https://henmanperformancegroup.com/tips/succession-planning/>
<https://www.baywork.org/wp-content/uploads/2017/01/Succession-Plan-Worksheet.pdf> - **ideal for growth mindset professionals who want to be prepared and promotable**



Smartsheet Free Templates: Succession Planning (Emergency, Board, CEO) <https://www.smartsheet.com/succession-planning-templates>

The Boland Group

We specialize in helping nonprofit Boards select the right CEO / Executive Director using a consultative approach to succession planning and executive search best practices | 410.788.8100 | Ann@MissionDrivenSearch.org

