

PART 2 — Institutional Knowledge Audit

Who else knows what you know? This is where most small nonprofits discover their real vulnerability.

<input type="checkbox"/>	Knowledge Area	Who else has access to this?
<input type="checkbox"/>	Donor giving history and preferences <i>In CRM or accessible file</i>	Notes:
<input type="checkbox"/>	Foundation and grant relationships <i>Including program officer contacts</i>	Notes:
<input type="checkbox"/>	Board member giving history and engagement level	Notes:
<input type="checkbox"/>	Planned or expected future gifts <i>Any verbal commitments or conversations</i>	Notes:
<input type="checkbox"/>	Sensitive donor circumstances <i>Health, family, financial changes</i>	Notes:
<input type="checkbox"/>	History of difficult donor situations <i>What happened and how it was resolved</i>	Notes:
<input type="checkbox"/>	Annual appeal and campaign timelines <i>Vendor contacts, print deadlines, lists</i>	Notes:
<input type="checkbox"/>	Login credentials for fundraising platforms <i>Stored securely and accessible</i>	Notes:

PART 3 — Operational Continuity

If you were unavailable for two weeks starting tomorrow, what would break?

<input type="checkbox"/>	Continuity Area	Current Status / Gap
<input type="checkbox"/>	There is a named interim leader the board has agreed on. <i>Documented, not just discussed</i>	Notes:
<input type="checkbox"/>	Key vendors and partners know who to contact if you are unavailable.	Notes:
<input type="checkbox"/>	There is a written 90-day operating plan for fundraising continuity. <i>Even a one-page outline</i>	Notes:
<input type="checkbox"/>	Your board chair has a current summary of major gift pipeline.	Notes:
<input type="checkbox"/>	At least one board member has a personal relationship with your top 3 donors.	Notes:

<input type="checkbox"/>	Continuity Area	Current Status / Gap
<input type="checkbox"/>	There is a communication plan for donors if a transition occurs.	Notes:

PART 4 — Your Honest Assessment

If I stepped away tomorrow, the biggest gap would be:

The one thing I will do in the next 30 days to reduce that gap:

Succession readiness is not built in one sitting. Pick one gap from this checklist and address it this month. Then pick another. Progress is the goal — not perfection.

Notes: