

The Succession Planning Quiz

THE FULL ASSESSMENT

A companion to

Finish Well

Succession Planning for the Ministry You Love

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SKINNY BROWN DOG MEDIA

How This Quiz Works

Most leaders do not avoid succession planning because they are careless. They avoid it because they do not know where to begin, and because beginning feels like leaving. So the calendar fills, another year passes, and the ministry becomes a little more dependent on one person than it was the year before.

This quiz exists to give you a starting point. It is the long form of the brief self-assessment in Chapter 1 of *Finish Well*. Where that one takes five minutes, this one takes about twenty, and it looks at all six areas a healthy handoff depends on.

SCORING

Score each statement as your ministry actually is today, not as you hope it will be by Christmas. A score of 0 means not in place; 1 means partly true; 2 means clearly true and consistent.

Total each section as you go. The section scores matter more than the grand total, because they are what tell you where to start.

A WORD BEFORE YOU BEGIN

Nothing here is a test you can fail. A low score is information, not judgment. Every leader I have walked with started somewhere below where they wanted to be.

Take it alone first. Then, if you are brave, ask a board officer and one staff member to take it separately, and compare. The gaps between your answers are usually the most useful conversation you will have this year.

Each section ends by pointing you to the chapters that address it. You do not have to read the book front to back. Start where your score is lowest.

It is possible to finish well. It rarely happens by accident.

SECTION ONE

Timeline and Discernment

Whether you know what season you are in—and whether anyone else does.

	SCORE		
1. <i>Timeline clarity.</i> We have a realistic timeframe for a leadership change, even if the answer today is “not soon.”	o	1	2
2. <i>Permission to say it.</i> Succession can be named out loud here without being treated as an emergency or a resignation.	o	1	2
3. <i>Discernment.</i> I have prayed through this season and can say what I believe God is asking of me in it.	o	1	2
4. <i>Outside counsel.</i> I have someone outside the organization—a coach, mentor, or peer—with whom I can be completely honest about leaving.	o	1	2
5. <i>Rest versus release.</i> I can tell the difference between needing to leave and needing a break, and I have tested that honestly.	o	1	2
6. <i>Emergency plan.</i> If I were unavailable tomorrow, the board would know what to do in the first week, and it is written down.	o	1	2
7. <i>The first conversation.</i> The board and I have talked about my eventual departure in the same room, out loud, at least once.	o	1	2

Section total: _____ / 14

If you scored 6 or below, begin with Chapters 4 and 5. If you scored 11 or higher, this is not where your work is.

SECTION TWO

Preparing Yourself

The part no one can do for you.

SCORE

8. *Things I Do.* A “Things I Do” document exists and is current—what this role requires daily, weekly, monthly, and annually. ○ 1 2
 9. *Relationships written down.* Donors, pastors, partners, and vendors are documented with contact information and history, not carried only in my memory. ○ 1 2
 10. *Access.* Logins, accounts, and passwords live somewhere a successor or board officer could reach without me. ○ 1 2
 11. *Identity.* I have begun to separate who I am from what I do here, and I can name myself apart from the title. ○ 1 2
 12. *What comes after.* I have a picture of life beyond this ministry—purpose, rhythm, income, and people. ○ 1 2
 13. *Home.* My spouse or closest family understands the timeline and is walking it with me. ○ 1 2
 14. *Legacy in the present.* I know how I want to be remembered here, and I am living toward it now rather than planning to fix it later. ○ 1 2
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Section total: _____ / 14

If you scored 6 or below, begin with Chapters 3 and 5. Step 2, the “Things I Do” document, is the single most useful place to start.

SECTION THREE

Strengthening the Organization

Whether the ministry can carry weight that is not yours.

			SCORE
15.	<i>Mission clarity.</i> Our mission is clear enough that it will not drift when personalities change.	o I 2	
16.	<i>Role definition.</i> The ED/CEO role is defined in writing, beyond “the way we have always done it.”	o I 2	
17.	<i>Structure.</i> Our organizational chart reflects how the ministry actually works today, not how it worked five years ago.	o I 2	
18.	<i>Policy currency.</i> The employee handbook, policies, and job descriptions have been reviewed within the last two years.	o I 2	
19.	<i>Hiring process.</i> We hire the same way every time, and the process is written down.	o I 2	
20.	<i>Financial continuity.</i> Financial systems, reporting, and controls would survive a leadership change without interruption.	o I 2	
21.	<i>Nothing trapped.</i> No critical process lives in one person’s head, mine included.	o I 2	

Section total: _____ / 14

If you scored 6 or below, begin with Chapters 6 and 7.

SECTION FOUR

Preparing the Team

Whether the people who remain are ready to remain.

	SCORE		
22. <i>Staff understanding.</i> Our staff knows what succession is, and we can talk about it without panic.	o	I	2
23. <i>Trust.</i> Trust is high enough here that staff bring me bad news early rather than late.	o	I	2
24. <i>Evaluation.</i> Staff are evaluated regularly, in writing, with a real conversation attached.	o	I	2
25. <i>Hard conversations.</i> We address performance problems honestly, and when someone must leave, we end it well.	o	I	2
26. <i>Depth on the bench.</i> Someone other than me could carry each critical function for a season.	o	I	2
27. <i>Onboarding.</i> A new staff member could be brought in and set up to succeed without depending on me personally.	o	I	2
28. <i>Developing people.</i> I am actively developing the people who will remain, whether or not any of them succeeds me.	o	I	2

Section total: _____ / 14

If you scored 6 or below, begin with Chapter 8, particularly the ten steps for building a culture of trust.

SECTION FIVE

Strengthening the Board

Whether the body that must lead this transition is able to.

	SCORE		
29. <i>Board readiness.</i> Our board understands its role in succession and is willing to lead it.	o	I	2
30. <i>Board records.</i> Member terms, offices, and contact information are current and documented.	o	I	2
31. <i>Committees.</i> Committees operate under written charters approved by the board.	o	I	2
32. <i>Evaluation of the ED/CEO.</i> The board evaluates the executive annually, in writing.	o	I	2
33. <i>Governing, not managing.</i> The board knows the difference between governing and managing, and stays where it belongs.	o	I	2
34. <i>Recruiting ahead.</i> We are recruiting board members with the skills a transition will require, before we need them.	o	I	2
35. <i>Board succession.</i> The board has a plan for its own leadership succession, not only for mine.	o	I	2

Section total: _____ / 14

If you scored 6 or below, begin with Chapter 9.

SECTION SIX

Preparing for the Handoff

Whether the last hundred yards are planned or improvised.

	SCORE		
36. <i>Decision clarity.</i> We know who makes which decisions during a transition, and it is documented.	o	1	2
37. <i>Candidate qualities.</i> The board has agreed on the qualities to look for in the person who comes next.	o	1	2
38. <i>Donor confidence.</i> We have a plan to stabilize donor trust before, during, and after the transition.	o	1	2
39. <i>Volunteer stability.</i> We have a plan to keep volunteers who are attached to the leader, not only to the mission.	o	1	2
40. <i>My role afterward.</i> We have decided what my involvement will be after the handoff, including none, and for how long.	o	1	2
41. <i>The announcement.</i> We know how the news will be shared, with whom, and in what order.	o	1	2
42. <i>A word for the successor.</i> I have written down what I want to say to the person who follows me.	o	1	2

Section total: _____ / 14

If you scored 6 or below, begin with Chapter 10, then read Chapters 11 and 12.

Your Score

Add your six section totals.

One. Timeline and Discernment	_____ / 14
Two. Preparing Yourself	_____ / 14
Three. Strengthening the Organization	_____ / 14
Four. Preparing the Team	_____ / 14
Five. Strengthening the Board	_____ / 14
Six. Preparing for the Handoff	_____ / 14
Your total	_____ / 84

WHAT YOUR SCORE MEANS

67 to 84. You are early enough to build well. You have time, structure, and margin. Use them. Read *Finish Well* straight through, beginning with Chapter 3, and work steadily rather than urgently.

42 to 66. You are at risk of drift. Most of what you need exists in pieces, and the pieces are not connected to a plan. Start with your two lowest sections and give each one a ninety-day horizon.

0 to 41. You are in a compressed or unstable season. This is not a failure. It is a common place to begin, and it is recoverable. Start with Chapter 10 and work backward through your lowest scores. Consider bringing in outside help to stabilize the handoff rather than carrying it alone.

One caution. A high total with one very low section is more dangerous than an even middling score. A transition fails at its weakest point, not its average one. Look at your sections before you look at your total.

Your Next Three Moves

Written down today, while the scoring is still in front of you. Momentum comes from small, specific, dated commitments, not from resolve.

MOVE ONE

By when _____ With whom _____

MOVE TWO

By when _____ With whom _____

MOVE THREE

By when _____ With whom _____

AND THE ONE CONVERSATION YOU HAVE BEEN AVOIDING

You already know what it is. Write the person's name.

Where to Go from Here

Take the book in the order your scores gave you.

Section One	Chapters 4 and 5. Discerning when it is time, and letting go of a beloved ministry, calling, and identity.
Section Two	Chapters 3 and 5. Starting the conversation, and building the “Things I Do” document.
Section Three	Chapters 6 and 7. Strengthening the structure, and finding and keeping great staff.
Section Four	Chapter 8. Preparing the team and building a culture of trust.
Section Five	Chapter 9. Building a strong board.
Section Six	Chapters 10, 11, and 12. The handoff, a word for your successor, and walking away well.

The appendix carries the practical tools: a simple staff survey, a project proposal form, and a sample executive director succession plan you can adapt rather than build from nothing.

About the Author

Robin Fuller is a leadership coach who walks with ministry leaders through succession, from the first stirring that a season is ending to the day the baton is safely in someone else's hand. She led a pregnancy help ministry through her own transition and has guided many leaders through theirs since.

She lives in Grants Pass, Oregon, and coaches executive directors, boards, and teams across the pregnancy help and ministry world.

Finish Well: Succession Planning for the Ministry You Love is available October 1, 2026, in paperback, hardcover, and ebook.

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