***10 Steps for Emergency Succession Planning***

An **Emergency Succession Plan** (ESP) is a thoughtfully prepared plan to address an unanticipated departure of an Executive Director, usually occurring with only a few days or a week’s notice. Emergency succession plans ensure the uninterrupted performance of essential executive functions by outlining the steps for the temporary appointment of an acting Executive Director.

**ESPs address the following priorities:**

* Identifying an alternate person(s) to assume executive leadership functions as an interim executive for a limited period of time
* Clarifying the lines of authority within the organization following a leadership transition
* Creating a plan to communicate and educate key stakeholders (internal and external) about the transition and engage their support

There are several steps to be facilitated to develop an ESP, and each of those steps comes with a distinct set of questions to answer and assignments to complete. They are as follows:

1. **Establish Emergency Plan Team**
   * The team will be charged with ensuring the short term continuation of agency operations in the event of an unplanned executive departure.
   * The team is ideally comprised of Board members, the chief executive, key leadership on staff, and stakeholders.
2. **Clarify Board Responsibilities**
   * Developing clear expectations for the Board during the transition is critical.
3. **Update Contact Information**
   * An operational inventory and centralized location of important documents and contact information should be updated.
4. **Identify Critical Chief Executive Functions** 
   * Key functions and responsibilities of the chief executive must be identified;
   * One or more internal individuals who have the skills to temporarily assume those responsibilities are identified to carry out those functions and responsibilities until an acting or interim chief executive is identified.
5. **Review and Update Job Descriptions** 
   * Each position description on the senior management team needs to be updated. (Organizational charts should be updated annually as well.)
6. **Cross Train Key Management Staff** 
   * Staff must have the skill, experience or knowledge to temporarily assume additional responsibilities during a transition. Cross training is powerful in any organization but is critical to prepare a transition team for an unplanned departure.
7. **Identify Acting and Interim Chief Executive** 
   * An Acting chief executive is assigned for a short period of time to assume the responsibilities of the chief executive. This person is usually someone from inside the organization that has the skills to oversee day to day operations, make decisions with Board member’s support, and manage communication throughout the transition.
   * An interim chief executive is a deeply skilled manager who will temporarily run the organization for up to 9 months. This person, ideally from outside the organization and not interested in the permanent position, will help the Board and staff assess the organization’s future leadership needs, capacity issues, strengths and weaknesses, and lay the foundation for the new chief executive’s success.
8. **Address the Impact on Staff** 
   * For some staff the unexpected departure of the organization’s leader can be traumatic. An important part of the emergency succession plan is a critical incident response plan. The primary goal of the plan is to have a action steps in place to give staff as much accurate and immediate information as possible and to provide them with the support they need in adjusting to the unexpected departure. The plan is executed within 12 – 36 hours of the chief executive’s departure.
9. **Develop a Communication Plan** 
   * One of the most essential and difficult tasks is managing the message and properly communicating an unexpected departure to key stakeholders. Not having a clear and effective communication plan can leave the community, supporters, clients, and funders wondering about the health and direction of the organization.
10. **Develop a Written Emergency Leadership Transition Plan**
    * A written plan shows thoughtfulness to staff and key stakeholders and acts as the critical plan to follow in the event of an unexpected loss of the organization’s chief executive.