



EMERGENCY LEADERSHIP TRANSITION PLAN

If an organization's CEO/executive director abruptly resigns, is fired, or is otherwise unable to lead the organization, it is vital to have an emergency transition plan in place.

The staff and board must be able to continue the daily tasks that keep the organization running, but cannot do so without clear leadership and a plan to address the leadership vacancy moving forward.

A strong emergency leadership transition plan covers four key areas: communications, financial oversight, interim management, and executive search.



Who is the first point of contact in the event of a change in the executive director's situation? Typically, this is the board chair. This person should be prepared to notify all board members and discuss next steps.

Subsequent communication containing the circumstances and recommended plan of action should be sent to all board members for approval and the staff for information.

Once the plan of action has been determined, a message from the board chair should be sent to the organization's key stakeholders detailing the plan for the leadership transition.



Having multiple signatories on the organization's checking accounts enables business to continue in the chief executive's absence. These signatories might include the chair and the secretary-treasurer (who could also be included on an investment account).

To account for geographical differences, it should be possible to make transactions electronically on all of the accounts.

Contact information for financial advisors should be available for questions related to financial issues.

Contact information for accountants (internal and external) should be available to ensure that timely employee payroll payments are continued.

Other critical information and contact lists should be available to the board chair in the event of an emergency (e.g., contact information for key funders and upcoming deadlines on important activities, such as the deadline for filing the IRS Form 990).

EMERGENCY LEADERSHIP TRANSITION PLAN



Who will the board designate to perform the chief executive's essential duties before the search and selection process has been completed to appoint the permanent chief executive? Should this be determined in advance for short-term periods (e.g., three months) versus longer term periods? Two options for interim management are

1. an acting chief executive appointed by the board to provide leadership during the planning and/or implementation phases of the executive search. This might be a senior manager or a board member.
2. an interim chief executive who helps prepare the organization to work effectively with the next chief executive. This might be a seasoned executive from outside of the organization.



While interim management is in place, is the board likely to work with an executive search consultant? If so, what are the best sources of recommendations on qualified search consultants for the board to consider?

What action will the board take to appoint a search committee?

What is the proper delegation of authority between the search committee and the board?

Portions of an emergency leadership transition management plan can be tested when the chief executive takes a vacation, a sabbatical, or some other time away from the organization. This can provide a good opportunity to observe the mettle of emerging leaders within the organization.

[Resource: Chief Executive Succession Planning](#)