**Emergency Succession Plan Template for Nonprofit Leaders: Part 1 – Document Current Responsibilities**

We consider this a “brain dump” guide. For each organizational area, list or describe the current status in the “as of” column and in the “by” column, detail any upcoming deadlines or next steps. Note items or actions that are high priority or that would need to be addressed immediately in the “special attention” column. You do not need to assign or transition roles in this part; the “who” will be covered in part 2.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Category | As of <DATE> | By <DATE> | Items Requiring Special Attention |
| ORGANIZATION | Role of Executive Director |  |  |  |
| Board |  |  |  |
| Strategy |  |  |  |
| Mission, Vision, Values |  |  |  |
| Culture and Climate |  |  |  |
| Change Readiness & Adaptability |  |  |  |
| OPERATIONS | Financial Health |  |  |  |
| People |  |  |  |
| Property |  |  |  |
| Communication |  |  |  |
| Infrastructure |  |  |  |
| Policies |  |  |  |
| Partnerships/Relationships |  |  |  |
| Volunteers |  |  |  |
| PROGRAMMING | Development |  |  |  |
| Delivery |  |  |  |
| Evaluation |  |  |  |
| COVID-19 RESPONSE |  |  |  |  |
| EXTERNAL FACTORS |  |  |  |  |
| OTHER |  |  |  |  |

**Emergency Succession Plan Template for Nonprofit Leaders: Part 2 – TransitionKey Management Responsibilities**

After you’ve detailed where things are now, upcoming deadlines, and key priorities, it’s time to document who will do what should anything affect your ability to perform the above roles. The purpose of this part of the plan is to ensure continuous coverage of program management duties that are critical to the organization’s or program’s ongoing operations and sustainability. Since current status and next steps are documented in step one, use this guide to detail where relevant documents are saved, other relevant people involved or that need to be notified, etc. Once this is complete, share both parts of this plan with all relevant team members and set up a time to cross-train on key responsibilities or answer any questions they may have.

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Responsibility** | **Description** | **Transition to:**  | **Important information**  |
| Operations/ Facilities Management |  |  |  |
| Fund Development  |  |  |  |
| Human Resources |  |  |  |
| Financial Administration |  |  |  |
| External Relationships/ Partnerships/ Communication |  |  |  |
| Liaison to Board |  |  |  |
| Staff Supervision |  |  |  |
| Other (e.g., Program management)  |  |  |  |
| Back up to others:  |  |  |  |