



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, yet 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.



If the CEO resigns or abruptly, becomes incapacitated or worse, the board chair is typically notified. The chair should be prepared to notify all board members and discuss next steps. If the CEO is terminated, it should only be by the vote for the full board.

Subsequent communication containing the circumstances and recommended plan of action should be sent to all board members for approval and the staff for information. Many states prohibit email voting so this may have to be done at an emergency board meeting called for this purpose.

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. As time and resources allow, it may be appropriate for the chair to first call the organization's largest funders, and key community leaders.



Giving multiple leaders access to the organization's financial accounts enables business to continue in the chief executive's absence. These signatories might include the CFO or other fiscal staff, the board chair, and the secretary or treasurer.

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

Contact information for payroll process and other business functions 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), especially in organizations with minimal or no staff.

It may be imperative to remove the executive's access from financial platforms and other platforms, and if it's a contentious parting, assess what materials the executive may have belonging to the organization, and how to get it back, including keys, credit cards, passwords, computer, etc.

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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, the board may choose 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? If not, what process will the board follow?

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?

Planning for the Future

Once an executive has been hired, consider creating a succession plan to address future transitions.

[Resources: Chief Executive Succession Planning](#)

[What to Do – and Not Do – When Your Chief Executive Leaves](#)