



Instructions for the introductory worksheet in

Emergency Succession Planning

Purpose

The purpose of this exercise is to raise your board's awareness of the need to prepare for a sudden departure or unavailability of a key leader. It should also give you a good start in identifying your current leader's abilities that are critical to the operation of your organization.

Note: This exercise is designed for organizations without an Emergency Succession Plan in place.

Instructions

This exercise is in two parts.

- **Part 1 is designed for your board members to complete:**

Make and distribute a copy of this handout to each board member at your next board meeting. Take 10 minutes and ask the board to thoughtfully answer the questions.

- **Part 2 is for your key leader(s):**

Distribute Part 2 to your key leader(s) and ask that it be completed within two weeks. Although this could take a significant amount of time, ask them to try to complete it in less than an hour with short answers. At a later point this can be expanded upon.

- OR -

Have one of your board members sit down with your key leader(s) and fill out the form together.

Follow-Up

After both parts are complete, ask someone to compile and summarize the information for each question. Then, bring the summary back to a board meeting. This should be a good starting point in developing an Emergency Succession Plan. It may be an excellent project for a committee.

See our website for an Emergency Succession Plan template and other resources on this topic:

www.nonprofitsteward.org



Disclaimer: This information is not a substitute for competent legal and accounting advice rendered on your particular fact situation and planning goals. Laws and procedures change frequently and are subject to different interpretations.

©2014 Center for Nonprofit Stewardship www.nonprofitsteward.org



Introductory worksheet in

Emergency Succession Planning

Part One: For the board to complete.

a) What is the name of your key organizational leader(s) - the person(s) you consider vital to your organization?

-
-
-
-
-
-

b) What personal characteristics make your key leader(s) important to the organization and its programming?

-
-
-
-
-
-

c) What specialized knowledge, skills and relationships does your key leader(s) possess?

If the person listed above suddenly departed their position, do you have a suggestion of someone who could immediately fill this role in an interim capacity? If so, please note their name: _____

If not, what would you do?



Disclaimer: This information is not a substitute for competent legal and accounting advice rendered on your particular fact situation and planning goals. Laws and procedures change frequently and are subject to different interpretations.

©2014 Center for Nonprofit Stewardship www.nonprofitsteward.org

Emergency Succession Planning

Part Two: For the key leader(s) to complete.

The board is currently working on the topic of risk management and ways to protect the organization. One of the many aspects of risk management is protecting our leadership in case of unexpected departure or unavailability. Please help us identify how we would approach putting together an Emergency Succession Plan by taking a few minutes to fill out this form.

1. What specialized knowledge and skills do you possess that are of critical importance to the organization?

-
-
-
-

2. What relationships do you maintain that are of significant importance to the organization?

-
-
-
-

3. If you were to suddenly vacate your position (due to either planned or unplanned events) what challenges might occur?

-
-
-
-

4. Of your responsibilities, which would immediately need to be addressed to keep the organization running? (What would someone filling in as an interim need to be aware of?)

-
-
-
-

5. What do you know that no one else knows?

6. Do you have a suggestion of someone who could quickly and capably fill in on an interim basis?

How do you feel the board should approach identifying someone?

If the person listed above suddenly departed their position, do you have a suggestion of someone who could immediately fill this role in an interim capacity? If so, please note their name: _____

If not, what would you do?