

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 – Transition Key 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:			