




Emergency Succession Plan For

(Organization Name)

Leadership plays an essential role in the success of a nonprofit organization. And a change in Chief Executive leadership is as inevitable as the passing of time.

This document will help a nonprofit organization recognize that planning for unplanned or temporary leadership change is a best practice—in line with other plans nonprofits regularly complete (e.g., strategic plan, communications plan, fundraising plan). An Emergency Succession Plan can bring order in a time a time of turmoil, confusion and high-stress.

This is a template. Feel free to adapt to make it appropriate for your organization. Action items or areas for tailoring are noted with a line or a  symbol.

The term “Executive Director” is used throughout this document to address the Chief Paid Staff Member. Should your organization use a title other than Executive Director, feel free to use the title as directed by your organization’s bylaws or practice.

May this process bring your organization peace of mind in your day-to-day work.

Disclaimer Statement: This document is provided as guidance for a nonprofit organization facing a change in leadership. It should not be regarded as a substitute for legal advice or counsel. The advice of a competent attorney should be sought any time a nonprofit is considering

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Important Organizational Information. Complete the attached *Information and Contact Inventory* and attach it to this document. Also attach a current list of the organization's board of directors.

Copies. Copies of this Emergency Succession Plan along with the corresponding documentation shall be maintained by The Board Chair, the Executive Director, the Acting Executive Director Appointee, the human resources department, and the organization's attorney.

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Bank

Name(s): _____

Account Numbers: _____

Branch Representative(s): _____

Phone Number: _____

Fax: _____

Email: _____

Investments

Financial Planner / Broker Company _____

Representative Name: _____

Phone Number: _____

Email: _____

Who is authorized to make transfers? Who is authorized to make wire transfers? Are there alternatives?

Who are the authorized check signers?

Is there an office safe? Who has the combination/keys?

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E-mail: _____

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Human Resources Information

	Onsite Location	Offsite Location	Online URL
Employee Records/ Personnel Info*	_____	_____	_____
<i>*Names, home addresses, phone numbers, email, emergency contacts, etc.</i>			
I-9s	_____	_____	_____

Payroll

Company Name: _____

Account Number: _____

Payroll Rep: _____

Phone Number: _____

Email: _____

Facilities Information

Office Lease (for renters) _____

Building Deed (for owners) _____

Building Management

Company Name: _____

Contact Name: _____

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Disability Insurance (long-term)

Company/Underwriter: _____

Policy Number _____

Representative Phone Number/Email: _____

Broker Phone Number/Email: _____

Life Insurance

Company/Underwriter: _____

Policy Number _____

Representative Phone Number/Email: _____

Broker Phone Number/Email: _____

Dental

Company/Underwriter: _____

Policy Number _____

Representative Phone Number/Email: _____

Broker Phone Number/Email: _____

Long Term Care

Company/Underwriter: _____

Policy Number _____

Representative Phone Number/Email: _____

Broker Phone Number/Email: _____

Retirement Plan

Company/Underwriter: _____

Policy Number _____

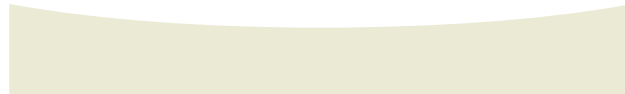
Representative Phone Number/Email: _____

Broker Phone Number/Email: _____

Date of Completion for Information and Contact Inventory: _____

Name of Person Completing Document: _____

The Emergency Succession Plan and the supporting documents (the information and contact inventory, job descriptions, and organizational charts) should be reviewed and updated annually.



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