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Crisis-Proof Your Organization: A Must-Have Checklist for Sudden Executive Departures

Whether your executive director just booked a one-way ticket to the South Pole or you're wisely planning ahead for the "what if," this checklist has your back. It's here to help you avoid that panicked 'where are the keys?!' moment when the unexpected happens. Because let's face it, whether it's a sudden departure or thoughtful preparation, every organization needs a plan in place.

This is your emergency roadmap for those surprise exits, but it's also just one slice of the pie. A full succession plan? That's the whole pie—covering everything from leadership transitions and talent development to preserving institutional knowledge and ensuring long-term sustainability, so your organization can continue thriving no matter who's at the helm. Let's make sure your organization is crisis-proof and ready for whatever comes next!

1. Emergency Leadership Designation

- Identify a senior staff or board member who can serve as interim executive director in case of sudden departure.
- Create a list of possible interim successors with priority order and contact details.
- Designate the board chair as backup if no senior staff is ready.

2. Critical Responsibilities Outline

- Create a document outlining all critical tasks handled by the executive director.
- Establish a clear chain of command for each major operational area (e.g., grantmaking, finance, fundraising, HR, program oversight).

3. Communications Plan

- Draft an internal notification protocol for informing board, staff, and key stakeholders about the executive director's sudden departure, including the appropriate order of notifications, communication channels, and guidelines for maintaining confidentiality and organizational stability.

- Create a list, by name or type, of key stakeholders that would need to be notified.
- Assign a leader (e.g., board chair or interim executive) to manage external communications.

4. Financial and Legal Considerations

- Ensure multiple people have access to financial systems, contracts, and legal documents.
- Designate authorized staff or board members to sign checks or contracts in the absence of the executive director.
- Outline the process for approving budgets and financial decisions without the executive director.

5. Board Engagement and Oversight

- Clearly define the board's role in overseeing interim leadership and the search for a permanent replacement.
- Pre-identify a search committee of board members to handle the hiring process for a new executive director.

6. Key Relationships Continuity

- Create a list of key relationships (e.g., funders, grantees, partners) managed by the executive director.
- Assign temporary relationship managers (staff or board) to maintain continuity.

7. Documentation and Knowledge Transfer

- Compile or update standard operating procedures for critical processes to ensure continuity in programming, fundraising, and operations.
- Update ongoing initiatives, project deadlines, and grant deliverables regularly in a centralized location.

8. Human Resources Contingencies

- Identify staff responsible for handling HR matters (e.g., hiring, firing, staff performance) in the absence of the executive director.
- Establish a plan for supporting staff morale during leadership transitions (e.g., counseling, regular updates from interim leadership).

9. Technology and Systems Access

- Ensure multiple staff members or board members have access to the executive director's email, files, and critical software platforms.
- Implement a password management system that is shared securely with key personnel.

10. Risk Management and Legal Compliance

- Confirm that the organization's insurance (e.g., key person insurance, directors & officers liability) is current.
- Establish relationships with legal counsel to handle any risks or liabilities during transitions.

11. Summarize and Share

- Summarize this into a single "Sudden Executive Transition Plan" document and share it with multiple board members and staff so that it is easily available in the event of an unexpected departure.
- Update this document at least annually.

Congratulations! You've got your emergency plan in hand, and that's no small feat. But remember, checking off this list doesn't mean you've cracked the succession planning code. It's like having a fire extinguisher but forgetting to install smoke detectors—you're still vulnerable without the bigger picture.

If you're thinking, "Okay, but how do I build a plan that covers it all?" don't sweat it. I'm here to help you craft a comprehensive succession plan that ensures smooth transitions and strengthens your organization—no matter what comes your way. Reach out when you're ready to take that next step—Kris Putnam-Walkerly, President, [Putnam Consulting Group](#) You can email me at kris@putnam-consulting.com, [schedule a call](#), or call me directly at 800-598-2102 x1.