**EMERGENCY SUCCESSION PLAN**

EMERGENCY

SUCCESSION PLAN

COMPANY NAME

Street Address

City, State and Zip

webaddress.com

Version 0.0.0

00/00/0000

| VERSION HISTORY |
| --- |
| VERSION | APPROVED BY | REVISION DATE | DESCRIPTION OF CHANGE | AUTHOR |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PREPARED BY** |  | **TITLE** |  | **DATE** |  |
| **APPROVED BY** |  | **TITLE** |  | **DATE** |  |

# EMERGENCY SUCCESSION PLAN TABLE OF CONTENTS

[1. RATIONALE 3](#_Toc525044417)

[2. PLAN IMPLEMENTATION 3](#_Toc525044418)

[3. PRIORITY FUNCTIONS 4](#_Toc525044419)

[4. SUCCESSION PLAN – SHORT-TERM 5](#_Toc525044420)

[A. DEFINITIONS 5](#_Toc525044421)

[B. TEMPORARY STAFFING STRATEGY 5](#_Toc525044422)

[C. ACTING APPOINTMENT 5](#_Toc525044423)

[D. STANDING APPOINTEES TO THE POSITION 6](#_Toc525044424)

[E. CROSS-TRAINING PLAN 6](#_Toc525044425)

[F. ACTING AUTHORITY AND RESTRICTIONS 6](#_Toc525044426)

[G. COMPENSATION 7](#_Toc525044427)

[H. BOARD OVERSIGHT AND SUPPORT 7](#_Toc525044428)

[I. COMMUNICATION PLAN 8](#_Toc525044429)

[5. SUCCESSION PLAN – LONG-TERM 8](#_Toc525044430)

[A. DEFINITIONS 8](#_Toc525044431)

[B. PROCEDURES 8](#_Toc525044432)

[6. SUCCESSION PLAN – PERMANENT 8](#_Toc525044433)

[A. DEFINITION 8](#_Toc525044434)

[B. PROCEDURES 8](#_Toc525044435)

[C. INTERIM HIRING PROCEDURE 8](#_Toc525044436)

[D. RESPONSIBILITIES OF THE INTERIM HIREE 8](#_Toc525044437)

[E. BOARD OVERSIGHT AND SUPPORT TO THE INTERIM HIREE 8](#_Toc525044438)

[7. APPROVALS AND MAINTENANCE OF RECORD 8](#_Toc525044439)

[A. EMERGENCY SUCCESSION PLAN APPROVAL 8](#_Toc525044440)

[B. SIGNATORIES 8](#_Toc525044441)

[C. MAINTENANCE OF RECORD 8](#_Toc525044442)

[D. FINANCIAL CONSIDERATIONS 8](#_Toc525044443)

# RATIONALE

Provide the purpose of the succession plan and the plan’s objectives in the event of a planned or unplanned absence.

|  |
| --- |
|  |

# PLAN IMPLEMENTATION

Discuss the authorizing parties and who has been charged with the implementation of the plan terms in the event of a planned or unplanned absence.

|  |
| --- |
|  |

# priority functions

Identify the key functions, along with a corresponding staffing strategy.

|  |  |
| --- | --- |
| **KEY FUNCTION** | **STAFFING STRATEGY** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# SUCCESSION PLAN – SHORT-TERM

## DEFINITIONS

Provide the factors that qualify a temporary absence.

|  |
| --- |
|  |

## temporary staffing strategy

|  |
| --- |
|  |

## Acting appointment

|  |
| --- |
|  |

## standing appointees to the position

|  |
| --- |
|  |

## cross-training plan

|  |
| --- |
|  |

## Acting authority and restrictions

|  |
| --- |
|  |

## compensation

|  |
| --- |
|  |

## board oversight and support

|  |
| --- |
|  |

## communication plan

Provide detailed steps for the information dissemination, along with a timeline for key events and a list of key supporters, including their corresponding communication responsibilities.

|  |
| --- |
|  |

|  |  |
| --- | --- |
| **KEY SUPPORTER** | **COMMUNICATION RESPONSIBILITY** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# SUCCESSION PLAN – LONG-TERM

## DEFINITIONS

Provide the factors that qualify a long-term absence.

|  |
| --- |
|  |

## PROCEDURES

|  |
| --- |
|  |

# SUCCESSION PLAN – PERMANENT

## DEFINITIONS

|  |
| --- |
|  |

## PROCEDURES

|  |
| --- |
|  |

## interim hiring procedure

|  |
| --- |
|  |

## responsibilities of the interim hiree

|  |
| --- |
|  |

## board oversight and support to the interim hiree

|  |
| --- |
|  |

# approvals and maintenance of record

## EMERGENCY SUCCESSION PLAN APPROVAL

Describe the approval process, the timeline for review and amendments, and the parties responsible.

|  |
| --- |
|  |

## SIGNATORIES

Designate who will sign the plan and who will have signature authorization for checks and contracts.

|  |
| --- |
|  |

## maintenance oF record

|  |
| --- |
|  |

## financial considerations

List who will be responsible for the finance review, and provide procedures for the financial access approval.

|  |
| --- |
|  |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |