

# Does Your Organization Have an Emergency Leadership Transition Management Plan?

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Emergency leadership transition management has been on my mind ever since the tragic, untimely death last month of Rabbi Aaron D. Panken, Ph.D., z"l, may his memory be for a blessing, the 12th president of Hebrew Union College-Jewish Institute of Religion. As soon as *shiva* had passed the leadership of the College-Institute named Rabbi David Ellenson, Ph.D., its Chancellor Emeritus as the Interim President. Dr. Ellenson had served the College-Institute as its 11th president from 2001 – 2013. There is no one who knows the institution, its faculty, administration, leaders, donors, funders and students better than he. He could bear the sad burden of enabling the College-Institute to carry on under extremely trying circumstances.

But, how many organizations, when confronted with any unexpected, unsettling change in leadership, can have such an elegant a solution and the ability to turn to a trusted, valued former leader? What would happen to your organization if a key employee could no longer serve?

I believe that every organization should have an emergency transition plan in place.

An effective plan provides clarity on who will do what in the event of the God forbid. The essential elements of such a plan are key to an orderly transition. There are three things that must be in place to manage any succession plan, especially an unexpected one. And, by creating such a plan and having it ready to be executed, you may avoid additional anxiety in a time of great stress. In the case of the need to replace an organization's leader, it is vital that:

1. The board understands the job of the chief professional of the organization. The most basic component is a current written job description that clearly spells out the responsibilities of the position and the person who occupies it.
2. The board and CEO/ED communicate regularly and transparently about mutual expectations. As a principal develops and asserts leadership, the organization simultaneously undergoes changes in institutional strategy, staff and environmental conditions. Good governance is the result of a constructive, interdependent partnership based upon a shared vision of their respective roles and responsibilities.

3. There is a constructive process for self-assessment and evaluation of the CEO, the board, and its individual members. These annual processes should be well-defined, based upon mutually agreed upon expectations and clear, measurable objectives. And, while an annual, written review is at minimum what should be expected, a structured program of feedback at regular intervals is better still.

In sum, here is a checklist of key elements of a leadership transition plan to have in place long before it would be necessary:

- An up-to-date job description for the position
- Clear, written annual performance expectations
- Measurable benchmarks for the performance of the organization and each of its divisions
- Regular check-ins to determine that the organization is proceeding in the right direction and that the staff person has the appropriate qualities for the tasks at hand
- An emergency leadership transition management plan
- A process for hiring a new key employee
- Maintaining the unity of the leadership – professional and volunteer – and assuring focus on the future.

As in the case of Hebrew Union College-Jewish Institute of Religion, the sadness of the death of a beloved CEO is incomparable. We reach out to all our friends and colleagues at the College-Institute with our heartfelt hope that time and memory will provide them with the healing and blessing they so richly merit.

For the rest of us, should we ever be confronted with an unexpected transition of leadership, our stress and anxiety will be alleviated and the future well-being of the enterprise and those who depend upon it will be assured through thoughtful succession planning now.

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