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Timeline –The First Month by Week

Week 1

- Convene executive committee (minimally) or full board to discuss the situation and next steps.
- Appoint a transition chair and transition taskforce participants.
- Develop communications priorities, agree on immediate talking points/messaging, assign spokespeople and gather contact information.
- In the case of bad news (death, board termination, public awareness of negative situations, etc.), form an immediate media strategy and agree on immediate talking points/messaging.
- If the departing CEO remains on-board and available, decide upon her or his role, how the departure will be announced, and if there will be any departure event.
- Communicate situation and immediate plans to:
 - Staff and volunteers
 - Clients and their families
 - Top priority partners and funders.
- Assess organizational risk.
- Ensure former CEO's access to organizational resources, finances, accounts, communications, etc. has been removed. (Timing for this may vary depending on the tone and type of departure.)



Organizational Risk Assessment Sample

Category	Suggested Questions	Risk Level H / M / L	Comments / Next Steps
Safety and security	Are clients, their families, staff, and volunteers safe in our facilities, programs, vehicles, etc.?		
Finance	<ul style="list-style-type: none"> • Have we removed the former CEO’s access to the organization’s money and resources? (Online banking, pay roll systems, investment accounts, etc.) • Are financial rules and controls in place requiring more than one person to be involved in any significant financial transaction? • Does the organization reasonably expect to have sufficient cash to continue operations? Are there any expected cash challenges in the next three to six months? • Does the organization expect to lose any significant revenue source in next three to six months? • Do we have any out-of-control expenses? • Do we have outstanding debt? <p><i>Financial issues may spill into other areas on this risk assessment list (e.g. eviction due to nonpayment of rent)</i></p>		

Go to www.ClarityTransitions.net to purchase the complete Toolkit