



## IVY HILL PREP BOARD OF TRUSTEES

### Emergency Succession Planning for HOS

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#### Definitions:

1. **Emergency Succession Planning:** Making sure that there is a written plan which enables the board, school staff, and families to be clear on which staff would be responsible for key responsibilities and which staff would report to the board in the event that a sudden emergency prevented the HOS from continuing in his or her role.
2. **Long-Term Talent Development Strategy:** While this can be as specific as agreement on a future successor for the HOS and a timeline for the transition, for most organizations we work with, it is a more general planning process to ensure that the organization has in place policies and practices to build the next generation of leadership.

To ensure schools can consistently provide strong results for students and families, HOS and boards **MUST** ensure that their organization has a written emergency succession plan and a set of policies and approaches that are building the future generations of leadership of the organization, even from the organization's earliest years.

The remainder of this document outlines BoardOnTrack's recommended process for creating the emergency succession plan and for ensuring that long-term succession is receiving adequate attention, given the pressing needs of managing and governing a charter school.

#### Emergency Succession Plan

This plan clarifies who would be responsible for managing which aspects of the school and who would report to the board, if the HOS becomes suddenly unavailable to do his or her job.

#### Procedure for Plan Development

1. The creation of an emergency succession plan originates with the HOS.
2. The HOS should draft a plan, share this with the HOS Support and Evaluation Committee or Taskforce, receive feedback, and revise as necessary.
3. The revised document should be shared with the full board for an official vote to accept the emergency succession plan.

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#### Creating a Draft Emergency Succession Plan

1. Take the HOS job description (after confirming that it truly reflects the HOS's major responsibilities) and list the categories of the main responsibilities, with notes on the key pieces of each.
2. Assign each category of responsibility to specific staff members. Ideally, responsibility for the entire job would rest with one successor, in an emergency, but often this is not feasible. If it is not, BoardOnTrack recommends that you divide the responsibilities between no more than two or, if unavoidable, three people. (Sample Template Available on BoardOnTrack)
3. After you have completed this process of outlining responsibilities and assigning them to one to three staff members, we recommend that you consider carefully what skills or background knowledge these staff members might need to develop in order to fulfill these succession responsibilities successfully. Then create action plans for meeting these learning needs. An example of this type of consideration and planning is summarized in the rightmost column on the example table below.
4. As you create your emergency succession plan, there are a few key questions that you should be sure to address:
  - Are all the responsibilities the HOS currently fulfills clearly delineated in the HOS job description? If not, it is time to revise it to document them. (The Board and HOS might consider making high level task lists, calendars, and “where is everything?” lists to capture what the leader does—see *Succession Planning Article*).
  - Do the designated successors have the skills and knowledge they will need? If not, how will they get it?
  - Do the designated successors have the necessary relationships with the key constituencies (students, families, staff, donors, authorizers, community leaders, etc.)? If not, how will they develop them?
  - Has the succession plan been made clear to senior staff? (While it can be uncomfortable to discuss emergency succession, key staff must know what they are responsible for if something comes up).
  - When will the plan be reviewed each year to make any necessary updates? (BoardOnTrack recommends you do so at your September or October board meeting each year.)

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