DELEGATION, SUCCESSION & HANDOFF SHEET

FORM REVISION	PRIVACY	REVIEW CADENCE
1.0	Organization-sensitive	Review annually and whenever key roles change

A name on an org chart is not a handoff. Continuity requires a clear triggering condition, defined authority, limits, access, records, contacts, and an end point. This worksheet supports planning but does not itself create legal authority.

ROLE AND TRIGGER

Essential role / function

Primary role holder

First successor / alternate

Second successor / alternate

Trigger for succession / delegation

Who confirms the trigger under existing rules

AUTHORITY AND LIMITS

Authority that transfers

Authority that does NOT transfer

Spending / approval limits

Records / systems the successor needs

Licensing / legal / supervisory limits

Expected duration / return condition

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HANDOFF CHECKLIST

- ☐ Current status and unresolved issues transferred.
- ☐ Essential records and access paths identified.
- ☐ External contacts and vendors transferred.
- ☐ Deadlines, risks, and pending decisions identified.
- ☐ Handoff acknowledged by outgoing and incoming role holders where possible.

ACKNOWLEDGMENT

Outgoing name / role / date

Incoming name / role / date

Reviewer / approving authority if required

Next review or expiration

Source basis: Built To Resist temporary-power and handoff chapters; FEMA continuity concepts on orders of succession and delegations of authority.
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