

## TRANSITION PLANNING CONSIDERATIONS

### **Timeline**

How proximate is the anticipated departure? What are the major factors that will dictate this timeline?

### **Succession Planning**

Does the organization have a succession plan in place? If so, how comprehensive is it? When was it created? Did the organization incorporate staff feedback? Does the board have explicit boundaries established with a departing long-time leader? Does the organization offer staff leadership development opportunities? Do you anticipate there may be internal candidates?

### **Strategy**

Does the organization have a current strategic plan? How might this transition be an opportunity or challenge in meeting those goals? What is the organization's impact on the community?

### **Board Development**

Is this a founding, governing, or institutional board? How much oversight have they had over the executive? Does the board plan to get staff input during transition? If so, how? Is there a search committee already in place?

### **Staff Development**

Are there internal candidates for the role? How might senior staff roles evolve as a result of the transition? What support will staff need to successfully adapt to these new roles? What decision-making processes could senior staff be brought into now, to support their growth in anticipation of the transition? How much staff time will be required to navigate the transition?

### **Financial**

What is the financial stability of the organization? How dependent are the funding relationships on the departing executive? When should key funders be brought into the conversation?



### **Culture**

How does leadership characterize the organizational culture and current climate? Can the organization articulate its guiding values? Are there signs of dysfunction (staff attrition, multiple sub-cultures that don't align, etc.) What elements of culture should be protected, and what needs realigning during the transition? How centralized is the power in the organization? How attached is the organization to the departing leader?

### **Equity & Representation**

Do the board and staff reflect the community served? Does organization have explicit values or goals around diversity, equity, accessibility, or inclusion? If so, how will they show up in recruitment/hiring/onboarding practices? How might unconscious bias be playing a part? What organizational culture alignment work needs to be done to set a new leader up for success?

### **Alignment**

Are board and staff operating with the same values/within the same culture? Are board and staff on the same page for what they are looking for in an executive? What qualities and skill sets are of high importance to each group? Has the board taken steps to prepare the staff for transition?

### **Transition Plan**

Is there a phased transition plan that addresses multiple phases: development and planning, successful exit, recruitment, onboarding and support? What are the associated expenses? Is the organization willing and able to contribute internal resources towards the overall transition budget? Are there other external resources available? Has the organization successfully implemented a transition plan in the past?

### **Scopes of Work**

If the transition plan includes existing scopes of work, has the organization reached out to multiple consultants to assess compatibility? Do consultants have relevant expertise for the task? Are scopes appropriate and realistic? Does scope of work reference organizational culture and/or change management? Is there a clear need not represented within plan/scopes?

**RESOURCES & LINKS:****Annie E. Casey Foundation**

[Capturing the Power of Leadership Change](#)

[Founder Transitions: A Guide for Executive Directors and Boards](#)

[Next Shift: Beyond the Nonprofit Leadership Crisis](#)

**Building Movement Project**

[Leadership Change: Navigating intergenerational and racial dynamics](#)

[Cautionary Tales for Extended Leadership Exits](#)

[The Leadership in Leaving](#)

**BoardSource**

[Five Leadership Transition Types](#)

[Executive Transition Timeline](#)

[Nonprofit Board Lifecycle](#)

[Nonprofit Founder Departures: Five Challenges](#)

[Chief Executive Exit Interviews](#)

[Acting & Interim Chief Executives](#)

**Harvard Business Review**

[The Last Act of a Great CEO](#)

**Nonprofit Quarterly**

[Exit Agreements for Nonprofit CEOs](#)

**TSNE MissionWorks**

[Transition Planning Checklist for Executive Directors](#)

[What's Next: Transition Planning Program](#)

[Key Learnings from the What's Next Program](#)