

EXECUTIVE TRANSITION TIMELINE



CLARIFY TRANSITION LEADERSHIP
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 STABILIZE SITUATION (IF NEEDED)
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 PLAN SEARCH & TRANSITIONS

- Transition committee holds meeting to develop job profile and search plan
- Transition committee launches search and schedules periodic check-in meetings
- Résumé review meeting
- Round one interviews (conducted by transition committee)
- Transition committee holds second planning session with staff
- Semifinalists visit office and meet with staff
- Round two interviews (conducted by executive committee)
- Board meets to ratify new chief executive selection

The board designs and implements an effective orientation and launch for the new executive. The goal is to ensure that the board and executive get off to the right start by clarifying priorities, as well as their respective roles and responsibilities, and their expectations and plans for monitoring and evaluating performance.

- Transition committee begins planning for on-boarding process
- Organization announces new executive
- New executive starts work
- Orientation/post-hire process begins
- Chief executive completes 90-day plan and engages in 90-day check-in review
- Six-month evaluation of executive
- Annual performance evaluation of executive

DEPARTURE-DEFINED
 SUCCESSION PLANNING

PREPARE

PIVOT

THRIVE

LEADER DEVELOPMENT PLANNING

1-3 YEARS >

4+6 MONTHS >

ONE BUDGET CYCLE >

Ideally, the organization has explored succession planning well ahead of the departure (a year or more), particularly if the departure involves a founder or long-term executive.

The board works to ensure that the organization is ready to hire a new executive and is prepared to start the search.

- Board/chief executive discuss departure
- Board appoints transition committee
- Transition committee holds organizing meeting and plans departure announcement
- Board chair meets with staff
- Organization announces departure publicly
- Transition committee holds planning session with staff
- Board holds strategic review and leadership planning meeting

SEARCH & SELECT
 •
 PREPARE & ORGANIZATION

LAUNCH & SUPPORT

ORGANIZATIONAL CAPACITY >