

Executive Director Transition Timeline Template

Proposed Transition Date (start of new hire):

Hiring Committee Members (does not usually include staff or the
Outgoing ED)
Board:
External (if applicable):

Transition and Onboarding Committee Members
(sometimes includes the Outgoing ED)
Board:
Staff:
External (if applicable):

Timeline

This document is laid out in 7 stages over a 6-month time frame. However, this process could be longer or slower, depending on an organization's immediate needs, capacity, or preference. These stages as outlined are only one possible sequence of many.

Stage 1 (6+ Months Prior)	3 3
Stage 2 (5 Months Prior)	5 5
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Stage 4 (3 Months Prior)	8 8
Stage 5 (2 Months Prior)	9 9
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Stage 7 (New ED Starts)	11 11

Consideration: Some organizations choose to have an interim ED to create more space for the organization to spend the time needed on a robust and intentional transition and hiring process (e.g. building the skills of someone internally, changing the leadership model, etc.). Note: An interim ED should not be someone who is planning to apply for the permanent ED role.

Considerations

- Fundamentally, you are managing people's fear and discomfort with instability and change. Be patient with people as you will have had more time to digest the idea and think of creative possibilities than they will have.
- How will you center diversity, equity, and inclusion into this process and lift up opportunities for Black, Indigenous, or other racialized folks?
- Has anyone previously expressed interest? Could someone who is currently in a junior position be trained or mentored in preparation for the ED role?
- Is there an opportunity to restructure the organization to create new opportunities, particularly in support of diversity, equity, and inclusion, or make the role more sustainable and appealing? e.g. Create two positions such as co-Executive Directors, Chief Operating Officer and Executive Director, etc., or create a multi-person Leadership Team with specific areas of responsibility.

Helpful TREC Resources

- [Creating Intentional Staffing Transitions workshop and resources](#)
- [Transitions in Leadership Toolkit](#)
- [Recruiting, hiring, and onboarding resource](#)
- [Resources on ED Evaluation](#)
- [Organization Information Inventory template](#)

Stage 1

(6+ Months Prior)

This stage is one of the most critical in the process. It sets the foundation for the transition. Taking the time to plan how, when, and to whom the transition is communicated can ease staff and Board anxiety concerning the transition. This is also the stage where the Board decides if they want to engage an external search firm in the process.

Consideration: *The first step (the Outgoing Executive Director creating a draft scenario plan) often begins long before the Executive Director and Board President meet to discuss the transition. For more on this step, check out [TREC's Creating Intentional Staffing Transitions workshop](#). It is important to note that while the Outgoing ED should prepare their vision for the transition and create the conditions for a [Brilliant Transformation](#), they need to acknowledge that the final decision on their successor will be by the Board.*

✓	What	Who	When
	Executive Director (ED) creates a draft of their ideal scenario for transition (e.g. timing, process thoughts, succession ideas, etc.) and notes on how the transition could be a benefit to the organization. <i>Are there internal staff that with mentorship and training could meet the timeline you are proposing? Can your timeline be adjusted to support the internal growth? Are there people in the organization that have been overlooked due to biases or not given the chance to take on new responsibilities? How can you set them up for success?</i>	ED	
	ED gives notice to Board President of their planned departure and discusses the internal communication plan (e.g. who to bring into the transition conversation and when).	ED	
	ED and Board President/Chair notify the Board (in confidence)	ED and Board President/Chair	
	Establish ED Hiring Committee: • Name point person to lead the process • Determine timeline • Identify scope of search • Assess capacity of Board • Decide if there is a need for an external search firm • Set report-back timeline (e.g. when and how the Committee reports back to the Board and staff throughout the process)	Board	

	Create a draft transition plan (who, what, when, etc.) that includes why the transition is a positive opportunity for the organization, how the organization plans to mitigate risk, and how staff will be supported through the transition.	Board and ED	
	Decide on timelines, including potential incoming and outgoing ED overlap, etc.	Board and ED	
	Allocate sufficient budget to the transition (may require changing current budget or additional fundraising)	Board	
	Create plan for staff involvement in the transition, including plan for regular updates on the process	Board and ED	
	Begin drafting external communications plan. Include timeline for communicating to core funders, partners, membership, etc., talking points, and what method of communication is best (e.g. calling core funders and partners, emailing members, etc.) • Foundations: personalized emails, phone calls from: _____ • Key Campaign partners: phone calls, personalized emails from: _____ • Major Donors: personalized emails, phone calls from: _____ • Partners: phone calls, personalized emails from: _____ • Members and volunteers: <i>via e-alert, newsletter</i> • Government agency officials: tailored message from: _____ <i>Note: A draft is made early in the process in case information on the transition is inadvertently released earlier than intended.</i>	Board and ED	
	Clearly define roles for communications with various audiences.	Board and ED	
	Create a plan for internal applicants (and communicate this plan to the staff in the next step)	Board and ED	
	In confidence, notify staff of the transition and present the draft transition plan, including staff's proposed points of involvement, process for applying as an internal candidate, etc.	ED and Board President	
	Begin visioning process (e.g. what is the future vision for the organization given this new opportunity)	Board and staff	

	<i>Is the mission, vision, and values of the organization clear?</i> <i>Do staff feel like they have direction?</i>		
	Form a Transition Team that can help the ED create the tools, materials, and processes that will help the staff through the transition. The Team might also help the ED see areas that need special attention that ED might be missing or unaware of. <i>How can the Transition Team help the ED exit and support the organization through the 'ending phase' of transition?</i>	ED and staff	

Stage 2

(5 Months Prior)

The goal of this stage is to ensure that the organization is creating a process for what the organization needs, moving forward. Are there any special considerations for making this transition an opportunity for growth? Who does the organization need next? How will the organization center diversity, equity, and inclusion in this process?

Consideration: *Be as clear as you can on the job positing. This builds trust and demonstrates respect for everyone's time. When descriptions, timelines, compensation, etc. are vague, people apply and go through the process only to find out during the 'offer phase' (Stage 5) that the job does not meet their compensation or work aspirations. This usually leads to having to restart the process again, which is likely to burnout staff and board.*

✓	What	Who	When
	Update organizational assessment (what is the current state of the organization)	Board	
	Identify the skills the organization needs in the next ED that will take advantage of the opportunities a transition brings. <i>Does the role need to shift to become more sustainable (less prone to burnout)? Are the expectations reasonable? Would someone want this job?</i>	Board or Hiring Committee (with support of ED and staff)	

	Update the ED job description based on what is needed in an ED now and into the future (versus simply replacing the current ED) <i>Does the time allocated to the duties add up to 80% of the ED's time to leave space for emergent opportunities or unexpected needs? If the expectations add up to 100% of their time, then the job description is probably too full for one person.</i>	Board or Hiring Committee (with support of ED and staff)	
	Consider current staff and explore training, mentorship or restructuring options that would support a candidate be successful in this position	Board and ED	
	Determine ED compensation package <i>Does your current salary meet or exceed the sector's average? Will candidates be able to negotiate (should be stated in the job posting)? What are your criteria for placing someone on your salary grid or accepting a higher counter-offer?</i>	Board	
	Review organization's hiring process and employee manuals (e.g. are they up to date, are they inclusive, etc.). See TREC's recruiting, hiring and onboarding resource.	Board and ED	
	Create an inclusive job posting based on the skills required by the position versus the perceived qualifications (e.g. what do you need the person to be able to do versus the credentials they might hold). <i>Avoid all-encompassing buckets like "duties as required". Consider including a pie chart highlighting the percentage of time anticipated that will be spent on the core responsibilities outlined in the job description. Include the job's salary and expectation of work hours in the description/posting. State if the salary is negotiable or what places people where on a range (if you are using a range).</i>	Hiring Committee	
	Create search plan • Where and how to post to reach desired demographics and skillsets • How to manage incoming applications • Screening process (e.g. as they come in or after a certain date?)	Hiring Committee	

	Develop Outreach Campaign • Networking • Announcements • Ads • Referrals • Internet Postings • Emails • Listservs • Placement on website <i>Organizations tend to have more success through 'active recruitment' (e.g. talking to people and suggesting they apply; sending personal invitations to apply; networking, etc.) versus 'passive recruitment' (e.g. simply posting the job on your website or on a general job posting site).</i>	Hiring Committee with ED (to assess where staff can support) and the Communications Team	
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Stage 3

(4 Months Prior)

During this stage, the focus is on outreach and recruitment of strong candidates. This stage is generally led by the Hiring Committee. How will the Committee reach out to diverse communities and encourage Black, Indigenous and racialized folks to apply?

Consideration: Interviews require a candidate to take time off work, find childcare, etc. Consider at what stage of the process you might financially compensate candidates for their time or expenses. At a minimum, if you require candidates to create content as part of the hiring process, you are asking them to do work for you and they should be paid for that time.

√	What	Who	When
	Following the plan, notify core people (e.g. people who should hear from the organization before they read about it online). This may include core funders, key partners, etc.	Lead by the Hiring Committee but might be executed by the ED, Board or other folks with key relationships	
	Post the position	Hiring Committee	
	Activate the outreach and communications plans	Board and Staff (possibly led by Communications Team)	

	Advocate for positive external media attention to increase visibility of the organization and amplify the search (e.g. contact media with a media release)	ED and Communications Team	
	Screen applications as they come in (develop evaluation criteria, non-negotiables, divide pool into yes, no, undecided). This may include initial screening calls (e.g. phone interviews)	Hiring Committee	
	Develop interview questions and process <i>Many organizations find using a scoring matrix helps them more objectively interview candidates by reducing the impact of unconscious biases.</i> <i>Decide what you are looking for in the answers to the questions you plan to ask to help prevent selecting candidates based on 'feel' or 'fit'.</i>	Hiring Committee	
	Identify top candidates for interviews and prepare for interviews	Hiring Committee	

Stage 4

(3 Months Prior)

There are many considerations for making a hiring process more equitable. There are a few resources on the TREC website (trec.org) on equitable hiring practices.

Consideration: *This stage of the process may need to be repeated if an appropriate candidate is not found on the first attempt.*

√	What	Who	When
	Conduct first interviews	Hiring Committee	
	Conduct second interviews (if applicable)	Hiring Committee	
	Recommend top candidate(s) to the Board (max 3)	Hiring Committee	
	Board interviews top candidate(s)	Hiring Committee	

	Conduct reference checks <i>Reference checks can have negative consequences for candidates in their current job. Consider only checking references for your top candidate. Use it more as a tool to find out how you can best set the candidate up for success in the new role (e.g. what type of supervision works best; what supports or training plan would be helpful to have in place; etc.)</i>	Hiring Committee	
	Make final recommendation to Board	Hiring Committee	
	Vote on final candidate	Board	
	Create offer package, including contract, employee manual, etc.	Hiring Committee	

Stage 5 (2 Months Prior)

It may seem like a generous lead time, however many candidates will already be in a senior role and will need the time to support a healthy transition from their current roles. This also gives the Hiring Committee and the Transition Committee more time to prepare to ensure there is a well-planned onboarding process.

✓	What	Who	When
	Make the offer to the candidate	Hiring Committee	
	Plan with candidate their ideal start date <i>Some incoming EDs may choose to have no overlap with the outgoing ED, while others may prefer one or two weeks. Agree in advance of the new ED starting the role.</i>	Hiring Committee	
	Based on conversations with the new hire, (re)assess - The required amount of overlap with the outgoing ED - If there needs to be external support for the new ED or staff as part of the transition (e.g. does the team need cultural competency training or support to be a better ally for the new ED)	Hiring Committee with the support of the ED	

	In confidence, communicate to staff about the new hire and the communication plan (e.g. when and how to share the news externally)	Board President (or Hiring Committee)	
	Create a detailed onboarding plan that centers diversity, equity and inclusion (see TREC resources on onboarding)	Hiring Committee and Transition Committee	
	Create ED evaluation plan (see TREC resources on ED Evaluation) - How often - What metrics or criteria	Board	

Stage 6

(1 Month Prior)

This stage is about making sure everything is ready for the Incoming ED in order to support them to transition in smoothly. This is the stage where the Transition Committee becomes more engaged. It is also good to review the onboarding plan and ensure that there is adequate time allocated for the Incoming ED to build relationships and trust with staff, board and key funders and partners.

Consideration: Does the transition plan center diversity, equity and inclusion?

✓	What	Who	When
	If applicable, begin conversations with core funders and partners about the new ED <i>Note: based on the confidentiality needs of the new ED, this step may need to wait until the official start date</i>	ED and applicable staff or Board	
	Update the organization's Organization Information Inventory document	ED and applicable staff or Board	
	Ensure all systems are in place to support the new ED (e.g. appropriate equipment, operating manuals, Transition Handbook created by the Outgoing ED, etc.)	Transition Committee	
	Review external communications material and plan with Incoming ED (if applicable)	Transition Committee, Communications Team and Incoming ED	

	Closure activity with outgoing ED (if applicable) <i>To support the organization close a chapter (ending phase) and create space for a new chapter to start (new beginning), it can be helpful to have an event (e.g. party, ceremony, etc.) to appreciate the outgoing ED and their contributions.</i>	Board and Transition Committee	
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Stage 7

(New ED Starts)

This stage is focused on onboarding and supporting the Incoming ED to transition in smoothly. The Transition Team generally leads this stage. It is important that the Transition Committee plays an active role with onboarding and that the new ED is not left to 'figure it out on their own'.

Many onboarding plans and processes are 6month to 12month plans, with a heavier investment by the Transition Committee in the first 3 months. This is a critical time for the new ED to build relationships and trust with staff, Board members, and key partners.

Consideration: Are processes in place to support staff and the new ED to build relationships and trust in service to creating a place of belonging?

√	What	Who	When
	Onboarding as per Onboarding Plan	Transition Committee	
	Review external communications material and plan with Incoming ED (if not done previously)	Communications Team and Incoming ED	
	Announce New ED externally via: • Membership • Public • Media release • Biography • Letter to stakeholders • Include a photo if possible	Communications Team with the Incoming ED	
	Training period with Outgoing ED if applicable	Outgoing ED with Incoming ED	

	Individual meetings with staff to build relationships, coordinate communication styles and needs, etc.	New ED and staff	
	Individual meeting with core funders and partners	New ED (supported by Outgoing ED or others with relationships)	
	Follow the 3, 6, and 12 month check-in and review plan between new ED and Board liaison to ensure the new ED feels supported, understands expectations, and knows how they are being evaluated <i>Regular check-ins help both the Board and new ED build a trusting and respectful foundation. They ensure that everyone is aware of what is working well and where there might be areas for improvement. There shouldn't be any surprises in an annual review. If there are, it means the system you have in place for check-ins and feedback might need to be adjusted.</i>	Board liaison and new ED	