

Self-Checklist for Considering a Transition Out of the Executive Director Role

This checklist is designed for Executive Directors who are thinking about transitioning out of their role. However, it can be used by anyone at any stage of transition.

Thinking about leaving an organization is a big step for an Executive Director (ED) or organizational leader. This checklist is designed to help a leader prepare and anticipate what might be needed to support a smoother transition. For more information and resources on transitions, see [TREC's Transitions in Leadership Collection](#).

Early Stage I – Quiet Exploration (Before You Tell Anyone)

- ☐ Review your [emergency succession plan](#) to ensure the organization is prepared for unexpected changes.
- ☐ Reflect on your long-term plan for the role and how long you envision staying.
- ☐ Notice internal signals such as feeling tired, feeling like you've achieved what you set out to do, or sensing the organization is shifting.
- ☐ Identify any major projects ending or organizational milestones that may influence timing.
- ☐ Consider early DEI implications, including whether internal staff could grow into future leadership roles.

If you are feeling like the transition is coming soon...

- ☐ Begin informally documenting key knowledge, systems, and relationships you manage.
- ☐ Clarify why you are considering transitioning: personal, organizational, or strategic reasons.
- ☐ Identify ideal timing for your departure, including hard and soft dates.
- ☐ Consider whether internal candidates might succeed you and what development they would need.
- ☐ Review all policies, procedures, and organizational systems to ensure they are up to date.
- ☐ Assess whether an interim ED may be required based on expected timelines.
- ☐ Identify any difficult staffing issues that should be resolved before transition.
- ☐ Evaluate whether the role is sustainable as-is or should be restructured for the next leader.
- ☐ Begin drafting your transition story—how you will share the 'why' and 'what's next'.
- ☐ Draft an early communication plan, knowing word may spread sooner than expected.
- ☐ [Review TREC's Transition Timeline Guide](#) and begin working through it.

Mid-Stage I – Your Organization Knows and it is >6 Months Away

- ☐ Prepare for emotional shifts as your influence and role begin to change.
- ☐ Increase communication with staff, board, and donors—repeat messages frequently to reduce anxiety.
- ☐ Constantly clarify the transition process, timelines, and what is known vs. not yet known.
- ☐ Begin delegating responsibilities to ensure continuity and strengthen staff readiness.
- ☐ Support the Board to establish a Transition Committee and understand their expanded, time limited role.
- ☐ Create a structured plan for supporting staff emotions and questions during this uncertain period.
- ☐ Review any vacation, overtime, or outstanding obligations that must be addressed before your departure.
- ☐ Complete your [Organizational Inventory](#) Document. Note: you may need support from HR or other members of your team to complete it.

Deep in Transition I – Final 3–6 Months

- ☐ Stay focused despite potential feelings of distance or decreased relevance.
- ☐ Ensure all organizational systems, policies, and procedures are fully documented and accessible.
- ☐ Prepare draft onboarding materials or guidance for the incoming ED.
- ☐ Identify knowledge you wish to pass forward: culture, risks, values, and hidden expectations.
- ☐ List key funder and partner relationships and begin transitioning them to staff.
- ☐ Identify potential challenges that could derail a new ED and prepare mitigation plans.

Deep in Transition II – Final 3 Months

- ☐ Maintain consistent communication—people are most anxious in the final months.
- ☐ Clarify interim leadership plans if a successor will not be in place.
- ☐ Ensure decision-making authority is clearly mapped during your final weeks.
- ☐ Ensure the [Organizational Inventory](#) is complete and that someone on the leadership team as well as the Board President/Chair has a copy (or know where it is).
- ☐ Check in with donors, partners, and nervous stakeholders who may need reassurance.

Wrap-Up – Final Month

- ☐ Ensure all undocumented knowledge (passwords, processes, relationships) is recorded and transferred.
- ☐ Clarify your boundaries post-departure—avoid joining the Board or lingering in ways that hinder the new ED's ability to lead.
- ☐ Participate in closure rituals or celebrations needed by staff or the Board.
- ☐ Clarify your anticipated relationship to the organization after departure.
- ☐ Ensure the onboarding plan for the incoming ED is understood by all.