

The Board's Role in a Leadership Transition

In an Executive Director (ED) transition, the board's role is to ensure organizational continuity, maintain stakeholder confidence, and oversee the hiring and onboarding of the next leader. The board's role is broader than serving as a search committee: it must guide the transition thoughtfully, confirm priorities, and provide steady governance through a period of change. During the transition, the board may need to take a more active oversight and coordination role while being careful not to assume ongoing staff functions unnecessarily. Once the new ED is established, the board returns fully to its core governance role.

It is also important to note that a board's time commitment usually increases during a transition. Board members should expect to invest additional time beyond regular board duties, especially if they are serving on a transition or search committee.

Board Tasks During the Four Phases of an Executive Director Transition

Board at a Glance: Key Responsibilities During an ED Transition

- Confirm the transition timeline and who is leading the process on behalf of the board.
- Activate the emergency succession plan if the departure is sudden or unplanned.
- Decide whether an interim or acting ED is needed to maintain continuity.
- Approve a communications approach for staff, funders, partners, and other key stakeholders.
- Review strategic priorities, organizational risks, and the leadership needs of the next stage.
- Clarify the search process, committee roles, and decision-making authority.
- Review compensation, the job description, and the candidate profile before launching the search.
- Approve an onboarding and first-year support plan for the new ED.

During a transition, some of the board's responsibilities become more active and time-sensitive. The following are common tasks and decisions that boards often need to undertake across the four main phases of an ED transition.

1. Preparation & Stabilization (Pre-Transition)

- **Risk Management:** Maintain an emergency succession plan to address sudden departures.
- **Confirm Timeline:** Work with the ED on the transition timeline. Decide on who will be communicated to and when. Consider working backwards from fixed dates, if applicable. (See [TREC's resources on transition timelines](#))
- **Interim Leadership Appointment:** Hire an experienced interim ED or Acting ED (see [TREC's resource on when to consider an interim or acting ED](#)). This prevents panic, ensures operational momentum, and gives the board time to conduct a thorough, deliberate search.
- **Stakeholder Communication:** Coordinate a clear communication plan for staff, funders, and community partners to preserve confidence, reduce uncertainty, and maintain trust. Clarify who will communicate what, and when.

2. Assessment & Reprioritization

- **Strategy Audit:** Evaluate current programs and strategic plans. Ask: What leadership and skill sets does the organization need for the next 3 to 5 years?
- **Role Reimagining:** Recognize that the departing ED may have accumulated specialized, organization-specific tasks. The board must determine which responsibilities belong to the board, which belong to the new ED, and which should be delegated to senior staff. This may also include looking at changes to the organizational structure (see [TREC's resource on co-leadership](#)).
- **Consider Internal Candidates Thoughtfully:** Assess the readiness of internal staff for expanded roles or the ED role using a fair, well-defined process. If the departing ED is involved, be clear about appropriate boundaries and avoid giving any one person undue influence over candidate selection.

3. The Search & Selection

- **Search Committee:** Form a dedicated, temporary transition or search committee. This committee is responsible for conducting the search process and making a recommendation to the Board of a suitable candidate. The whole Board is responsible for the final decision on the hire.
- **Consider External Support:** Some organizations choose to hire a search firm to assist with finding a candidate. If your organization chooses this option, be sure to clarify the specific roles and tasks of the Board members and the search firm to avoid confusion or disappointment. Hiring a search firm does not necessarily reduce the workload of the Board.
- **Compensation Benchmarking:** Ensure the salary range, benefits, and job description still align with sector standards, the local cost of living, and applicable legal and regulatory requirements. This is particularly important if the outgoing ED has been in the role for more than five years.

4. Onboarding & Support (Post-Hire)

- **Strategic Onboarding:** Do not treat hiring as the end of the transition. The board should ensure a structured 30-60-90 day onboarding plan, including introductions to key funders, partners, and community relationships, along with clear first-year priorities. (See [TREC's onboarding resources](#)) The Board should confirm the parameters of the ED's annual review process. (See [TREC's ED review resources](#))
- **Governance Shift:** The board must return from the higher level of operational engagement required during the transition back to long-term governance and policy-making once the new ED is in the seat.
- **Setting Boundaries:** Avoid micromanaging. Give the new leader the space to execute the strategic vision and make the role their own. This is particularly important if the New ED is following a founder or long-term ED. (See [TREC's resource on following a founder](#))

Common Pitfalls for Boards to Avoid

- Moving too quickly out of urgency rather than making deliberate decisions.
- Blurring the line between governance and operations for longer than necessary.
- Failing to communicate clearly with staff, funders, and partners during the transition.
- Expecting the new ED to replicate the outgoing leader rather than lead in their own way.
- Underestimating the board time and attention required during the search and onboarding process.
- Treating onboarding as informal or short-term instead of as a first-year board responsibility.

External Resources

TREC has many resources on [transitions](#), [new EDs](#), and [on-boarding](#). A few additional external resources include:

- [BoardSource](#)
- [National Council of Nonprofits](#)