

Following a Founder or Long-Term Leader

Worksheet for a New Executive Director

If you are a new Executive Director (ED) following a founding or long-term ED, one of the most helpful mindsets is to see your first job as stewarding a transition, not proving yourself through speed. You do not need to out-founder the founder, and you do not need to signal your value by changing everything quickly. In most cases, your early credibility will come from how well you listen, how clearly you communicate, and how steadily you create confidence in the organization's future.

This worksheet is designed to help a new ED step into leadership with clarity, especially when following a founding or very long-term ED whose relationships, decision-making habits, and public identity may be deeply woven into the organization. Use it to identify questions to ask, risks to watch out for, and priorities to explore in the first 3–12 months.

1. Board expectations and role clarity

Early clarity with the board matters. Following a founder often exposes blurred lines between governance and management, so it is important to understand what success looks like, which decisions need board involvement, and where continuity or change is expected.

Reflection questions

- What does the board expect of me in the first 90 days, 6 months, and 12 months?
- Where are role boundaries or decision rights still unclear?
- How will I build a strong working partnership with the board chair?

Response:

2. Founder legacy and ongoing influence

A founder may no longer hold formal authority but still carry significant influence with staff, donors, partners, or community members. The key is to understand how the founder is still present in the system and what boundaries will help avoid confusion.

Reflection questions

- What informal influence does the founder still have?
- What expectations exist about the founder's ongoing role?
- What boundaries or communication norms will help everyone relate clearly to my role?

Response:

3. Mission, loyalty, and organizational identity

Some stakeholders are committed mainly to the mission; others may be attached more directly to the founder. This is also a moment to notice how the organization talks about itself and whether its identity is broad enough to hold new leadership.

Reflection questions

- Where is trust rooted most strongly: in the mission, the results, or the founder?
- How founder-centred does the organization still feel in its stories, branding, and decision-making?
- What parts of the organization's identity need to be preserved, and what parts may need to evolve?

Response:

4. Key relationships and trust mapping

A new ED should quickly identify which relationships matter most to continuity and where the greatest transition risk sits. This includes formal leaders and informal influencers inside and outside the organization.

Reflection questions

- Who are the key people and groups I most need to build trust with?
- Which relationships were held primarily by the founder?
- Where do I need intentional outreach or careful repair work?

Response:

5. Knowledge transfer and organizational visibility

Founders often hold institutional memory in their heads rather than in systems. A new ED needs enough visibility into finances, people, commitments, risks, and unfinished business to lead with confidence.

Reflection questions

- What do I most need to know right away, and what can be documented later?
- Where is important knowledge still concentrated in one person?
- What blind spots could create avoidable risk if I do not address them early?

Response:

6. Organizational health before major change

It can be tempting to prove value through fast change, but early moves are often interpreted symbolically. A stronger first step is to assess organizational health, separate urgent issues from inherited noise, and pace change carefully.

Reflection questions

- What is truly urgent, and what is simply emotionally charged or long-standing?
- What early actions would build confidence without causing unnecessary disruption?
- What areas need diagnosis before I make bigger changes?

Response:

7. Staff trust, culture, and decision-making

Staff may be grieving, relieved, anxious, or hopeful all at once. This is also the time to notice whether decision-making is overly informal, overly centralized, or still dependent on what the founder would have wanted.

Reflection questions

- What emotions and trust dynamics seem most present in the staff team?
- Where are staff still looking for authority, reassurance, or permission?
- What decisions, meetings, or working norms need to be clarified?

Response:

8. Financial reality and donor confidence

A founder transition can expose financial weaknesses and unsettle donor confidence. The new ED needs a grounded view of the organization's financial reality and a clear plan for stewarding funders and major commitments.

Reflection questions

- What do I need to understand about cash flow, reserves, funding concentration, and grant obligations?
- Which funders or partners need early reassurance or direct outreach?
- How dependent has fundraising been on the founder personally?

Response:

9. Governance, risk, and symbolic decisions

Transitions are a good time to verify legal, governance, and policy basics, but also to remember that small choices can carry large meaning. Structural, staffing, or communication changes may be interpreted as statements about the founder or the organization's future.

Reflection questions

- What governance, compliance, or policy basics need immediate review?
- What proposed changes might carry more meaning than they appear to on the surface?
- How can I explain necessary changes in a way that feels respectful and mission-aligned?

Response:

10. Leadership resilience and first-year success

Following a founder can be emotionally and politically demanding. Early success is often measured less by dramatic change and more by trust, clarity, stability, and the gradual strengthening of institutional resilience.

Reflection questions

- What support structures do I need around me to lead well in this transition?
- What would trust, clarity, and stability look like by the end of my first year?
- How will I know the organization is becoming less dependent on any one person?

Response:

Additional Resources

Other helpful resources can be found in [TREC's Becoming an Executive Director](#) collection.

A few additional external resources that were used to create this worksheet include:

- [Building Movement Project](#). *Equitable Nonprofit Leadership Transitions*.
- [National Council of Nonprofits](#). *Succession Planning for Nonprofits / Managing Leadership Transitions*.
- [Stanford Social Innovation Review](#) and The Bridgespan Group. *Making Founder Successions Work*.
- [The Moran Company](#). *Insights from Nonprofit Executives Following a Founder*.
- [Charity Charge](#). *Guide: Executive Director Transition Plan*.
- [NPAG](#). *Creating a Nonprofit Executive Director Transition Plan*.