

# Executive Director Transition Timeline

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All nonprofit organizations will experience leadership transitions over the course of their life cycle regardless of their size or level of development. A transition timeline can be a great tool to assist with executive director succession planning. With a basic transition timeline in place, revisions can be made to address specifics once the transition becomes a reality. Ideally, three to four months should be allowed for the transition process but that should be flexible based on whether the executive director's departure is prompted by an emergency, termination, extended medical leave, resignation, or planned retirement. The timeframe listed below isn't as important as completion of planning activities to support a successful transition, including an updated executive director job description with backup assistance listed for all key tasks, and a summary of current grants and contracts complete with deliverables, reporting requirements, and invoicing instructions. Executive directors and board members of nonprofit organizations of all shapes and sizes should begin work on these activities immediately. Once these documents are developed, they should be updated annually.

## **Emergency Situation, Termination, or Extended Medical Leave**

When an executive director transition is prompted by an emergency situation, termination, or extended medical leave, the board of directors should be prepared to ensure tasks of the executive director are being completed whether for the short or long term. The board will need access to the executive director's job description that lists individuals trained to serve as backup. A summary of the organization's grants and contracts will also be extremely helpful for the board to understand financial and contract obligations so they can work with other staff members to ensure they are being fulfilled. These documents should be developed with the executive director in advanced succession planning. If a leader's departure is sudden, the board needs to determine if another staff member needs to be promoted to temporarily serve as acting executive director or if an outside individual needs to be hired to serve in that role. If another staff member is asked to serve in this role, their salary should reflect additional responsibilities. If the executive director is the only staff member of the organization, a member of the board or small board committee may need to step up to carry out tasks of the executive director until an interim can be hired.

## **Resignation or Retirement**

When an executive director resigns their position, it is hoped they will at least give a two week notice. However, two weeks is not much time to do all that is required to implement this significant leadership change. As stated in the previous paragraph, it is critical that the board, in partnership with the current executive director, has already developed an executive director

succession plan so that immediate steps can be taken to implement the plan. If the executive director's departure is prompted by a planned retirement, implementation of the organization's succession plan should begin three to four months in advance of retirement date.

### **Suggested Timeline**

*(NOTE: Timeline can be flexible and adjusted to better meet organization's needs depending on whether leadership transition is an emergency or a planned departure.)*

#### **Week 1:**

1. Current executive director (if possible), board president, and other key staff meet to review succession planning and assign roles and responsibilities.
2. If it is a planned departure, the current executive director should meet with the board to discuss plans and time frame for departure.

#### **Weeks 2-7:**

1. Current executive director and board president should ensure that executive director job description is up to date and that backup assignments have been made to ensure tasks are completed.
2. Current executive director and board president should ensure that a summary of grants and contracts including deliverables, reporting requirements, and invoicing process is up to date.
3. Identify key responsibilities of executive director that are critical for organization continuity.
4. Select interim executive director and determine interim's responsibilities and authority.
5. Identify other key staff or board members to assist with backup on executive responsibilities. Ensure backups have necessary training to complete assigned tasks.
6. Communicate with key stakeholders regarding executive transition and ensure continued commitment to complete projects per deliverable timeline.

#### **Weeks 8-10:**

1. Board president should appoint a search committee for the new executive director if current executive director is not able to return to job.
2. Search committee determines desirable leadership qualities for the new executive director.
3. Search committee develops a plan for announcing job opening, conducting interviews, and making a hiring decision.

**Weeks 11-16:**

1. After hiring decision has been made, the board determines a mentoring/coaching plan for the new executive director. Enlist past executive director for assistance if appropriate.
2. Board develops a supervisory and support plan for the new executive director to assist with successful performance.
3. Board president introduces new executive director to key stakeholders.