

Often times Executive Director transitions are abrupt, taking place within a 1-2 month period when an E.D. moves onto another professional opportunity. Rarely, they are even more abrupt after a tragedy or the Executive Director being fired.

However, in many instances an Executive Director is able to give significant advance notice to their board, often as much as 6-12 months.

In those instances, the organization has an chance to make the most of the transition so that it serves as an opportunity as much as a threat.

Below, I list 10 major steps an organization should consider to manage the transition, particularly in the 6 months immediately prior to it.

1. Make sure that the organization has a current strategic plan. In the absence of a complete strategic plan, the organization should hold a facilitated meeting to ensure the board is aligned with the remaining senior staff regarding the purpose of the organization and major programs for the next 1-2 years.
2. The Executive Director should consciously “transfer” personal relationships with major donors and institutional funders to others within the organization. Depending on the situation this could involve board members or other senior staff. This could be accomplished by holding meetings (e.g. lunches, coffees, or more formal) with the donors one-by-one or by hosting small gatherings with multiple donors.
3. Communicate early and clearly with allied organizations and funders in advance regarding the transition. In those communications, identify the specific steps the organization will be taking to ensure a successful transition.
4. In public communications, such as newsletters, press releases, the website, etc., tell success stories about other staff and have other staff serve as spokespeople. The more constituents come to know staff beyond the Executive Director, the less noticeable their absence will be.
5. Have the Executive Director write down organizational stories. These stories could involve the founding of the organization if they were involved in it. It should definitely involve stories that demonstrate the organization’s success and/or impact. Depending on the E.D., this may be best done by having someone “interview” the Executive Director and write up the stories as they are told, as opposed to having the E.D. sit at a computer and write.
6. Create an E.D. “Job Manual” that identifies the systems used by the Executive Director. This should cover all the major administrative and fundraising activities of the organization where the E.D. is involved, identifying what major activities need to be conducted weekly, monthly, quarterly, and annually. This might also cover major “program” activities if the E.D. plays a substantial role, again broken down by weekly, monthly, quarterly, and annually.
7. The outgoing E.D. should talk to other senior staff about their own timelines for professional development and discuss if/how to motivate them to stay on with the organization at least at least 6-12 months after the E.D. transition. This conversation should also be an early flag of whether the senior staff intend to apply for the Executive Director position.
8. As soon as feasible, the E.D. and the board’s Finance or Executive Committee should develop a cash flow analysis of where the organization will be financially as of the date the new E.D. should start. If at all feasible, additional funds should be raised or spending should be curtailed so as to maximize the amount of unrestricted reserve available at the time of transition. If cash flow is going to be tight, the board should be

asked to increase their personal giving in the short run in order to help.

9. If the outgoing E.D. has relationships where it would make sense, use the transition as a message around which to raise extra funds. Examples of tactics that have been successfully used include an event that “roasts” the outgoing E.D. and the creation of a “Legacy” fund by which donors can make a gift in honor of the outgoing E.D.
10. The board and Executive Director should identify a “Plan B” should the hiring process for a new Executive Director not succeed in finding someone appropriate who says yes. Boards should be enthusiastic about new Executive Directors and organizations are almost always better off not hiring someone who they believe will be mediocre. The Plan B could involve an outsider brought on as an Interim E.D. or the temporary assignment of one of the other staff as Interim E.D.

Do you have additional suggestions for steps an organization should take when planning for an Executive Director transition?

If so, please comment below.