

## Transition Planning Checklist For Executive Directors

### Are you and the organization ready for transition?

Use the list below to assess the transition readiness of both the organization and yourself, plan and prioritize next steps.

<u>Description</u>	<u>Rate</u> 1=low (not in place) 5=high (in place/strong)	<u>Priority</u> What is urgent and important to begin now	<u>Describe Status</u>
<b>THE ORGANIZATION</b>			
Identified key dependencies: knowledge, key relationships, funding strategy			
Reviewed the ED role: sustainable, replicable, fillable			
Emergency succession plan			
<b>Staffing for key positions:</b>			
Bench strength is identified for stepping up			
Cross training plan in place			
Knowledge capture/documentation process			
Individual professional development plans			
<b>Developing leaders:</b>			
Knowledge sharing in place			
Development opportunities in place			
<b>Board effectiveness:</b>			
Understands and manages responsibilities			
Has a succession plan			
Board effectiveness evaluated regularly			
Role of ED clear and Role of Board clear			
Annual ED evaluation			
<b>YOU</b>			
Clarity on post-departure aspirations, objectives & plans			
Knowledge transfer and file organization			
Readiness to let go of duties			
Clarity on my role within the transition process			
Clarity on my role with the organization post-departure			
Clarity on financial needs and plans			

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<b>PRIORITY 1:</b>			
Who leads?	Who needs to be involved?	Action Steps	Date Complete?
<b>PRIORITY 2:</b>			
Who leads?	Who needs to be involved?	Action Steps	Date Complete?
<b>PRIORITY 3:</b>			
Who leads?	Who needs to be involved?	Action Steps	Date Complete?