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Handling Change: 5 Steps to Manage Transitions in Leadership

One issue every organization will face at some point is the loss of an executive director. Being well-prepared and having a plan can help the organization avoid a difficult and disruptive transition period. Although every transition is unique, the following five steps may be helpful as you consider how to deal with an executive transition.

1. Do not rush to hire a replacement.

It can be tempting to rush to hire a replacement executive director, but bringing in the wrong successor can lead to losses in funding, staff and/or board members, and to a negative impact on other important relationships. It can cause stagnancy in the momentum of the organization and impair the organization's public reputation. Finally, the organization will incur additional expense when it undertakes the hiring process for a second time. Instead, appoint an interim executive director to provide leadership during the transition while the right person is located.

2. Take time to reflect.

A transition period is an excellent time for an organization to reflect on its goals, mission and operations. Review of procedures, policies, operations and finances will be necessary in order to educate the new executive. This reflection provides an opportunity for the organization to consider whether improvements are necessary to address any inefficiencies in operations and whether strategic goals are being met in a timely way.

3. Establish a transition committee.

A committee of board members should oversee the process of transition and executive recruitment, as well as the orientation and support of the new executive director following the hire. The committee might also be tasked with developing a strategy to manage the communications surrounding the transition. The committee might include, if appropriate, a staff member to serve as a liaison who can advise on issues facing the staff during the transition.

4. Manage the outgoing executive director.

The departing executive will have important information regarding the organization that may not be easily accessed once he or she leaves. In-depth conferences with careful note-taking will be necessary in order to extract as much of this information as possible. Relationships will need to be transitioned before the departure, and it will be important to work closely with the outgoing executive to ensure this is done as seamlessly as possible.

5. Establish a plan.

A successful transition requires a plan that focuses on the process in order to address timing issues and consider what support the organization will require during the transitional period. The plan should include deadlines to help

keep the process on track, including aspects the organization controls as well as those beyond the organization's control. A transition budget, which includes advertising and the costs of interviewing (such as travel costs and recruitment fees), should be considered and established. Finally, the plan should set forth how best to engage with the incoming executive, including statements of expectations and the preparation of an employment agreement and compensation package.

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