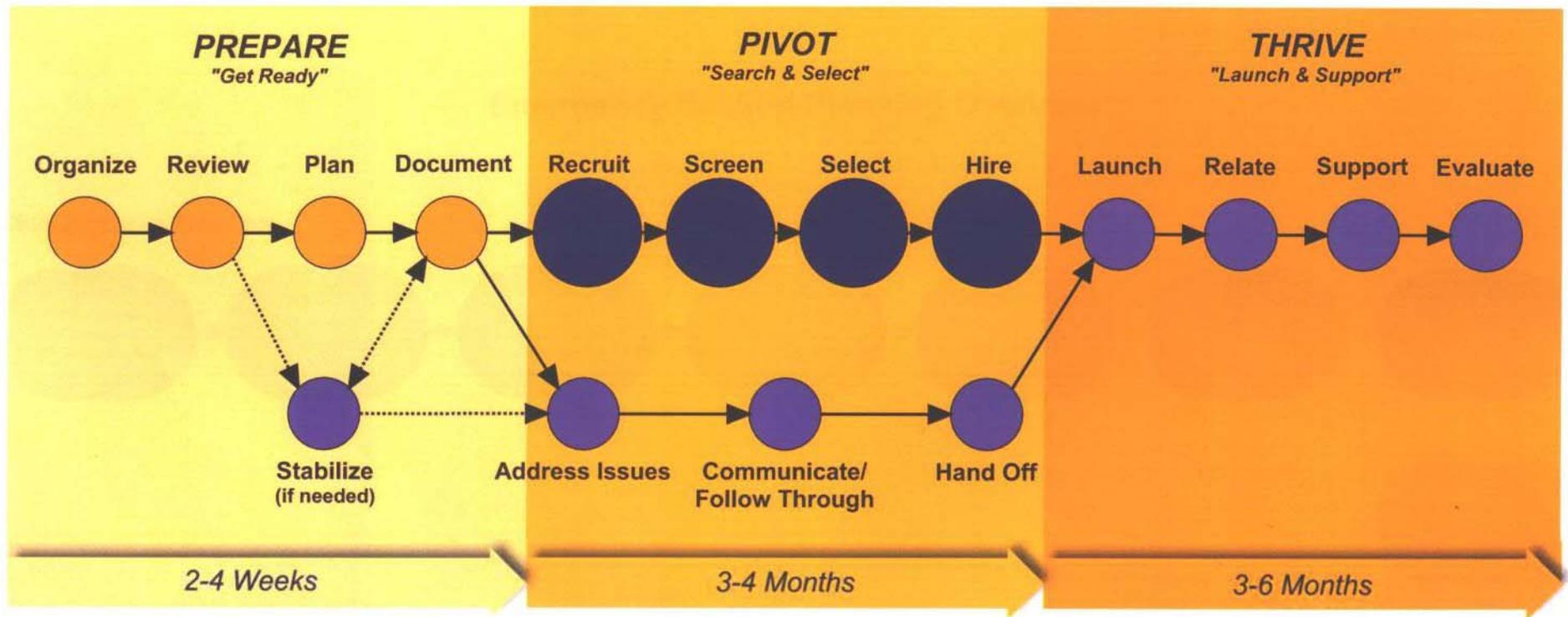


## Executive Transition Management Process Overview



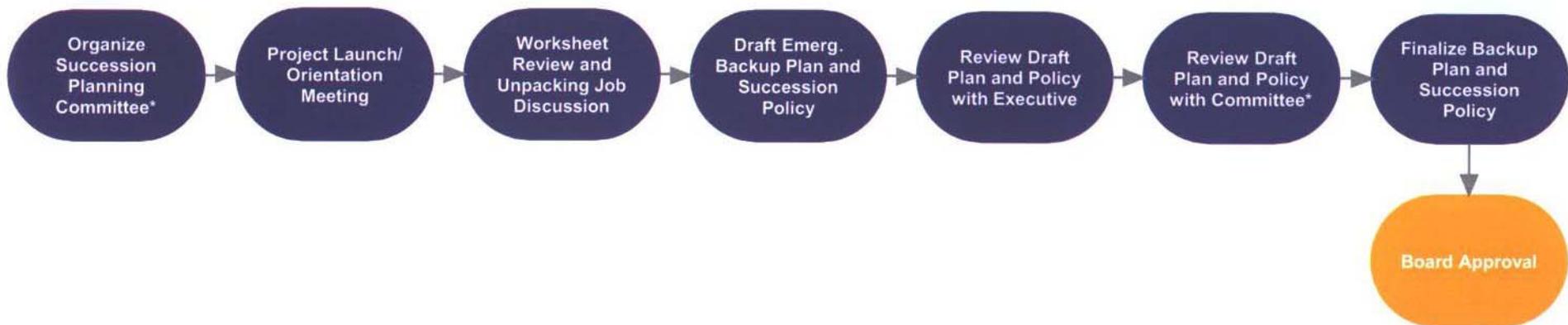
**Goal:** Increase the organization's capacity to deliver its mission under new leadership.

**Outcomes:**

- A new executive in place who fits current and future leadership needs of the organization;
- Transition issues have been addressed or are in a resolution track;
- Board and staff are prepared to work effectively with the new executive; and
- Board and executive agree on priorities, roles, expectations and performance measures.

## Emergency Backup Planning Overview

### Chief Executive Plan Only



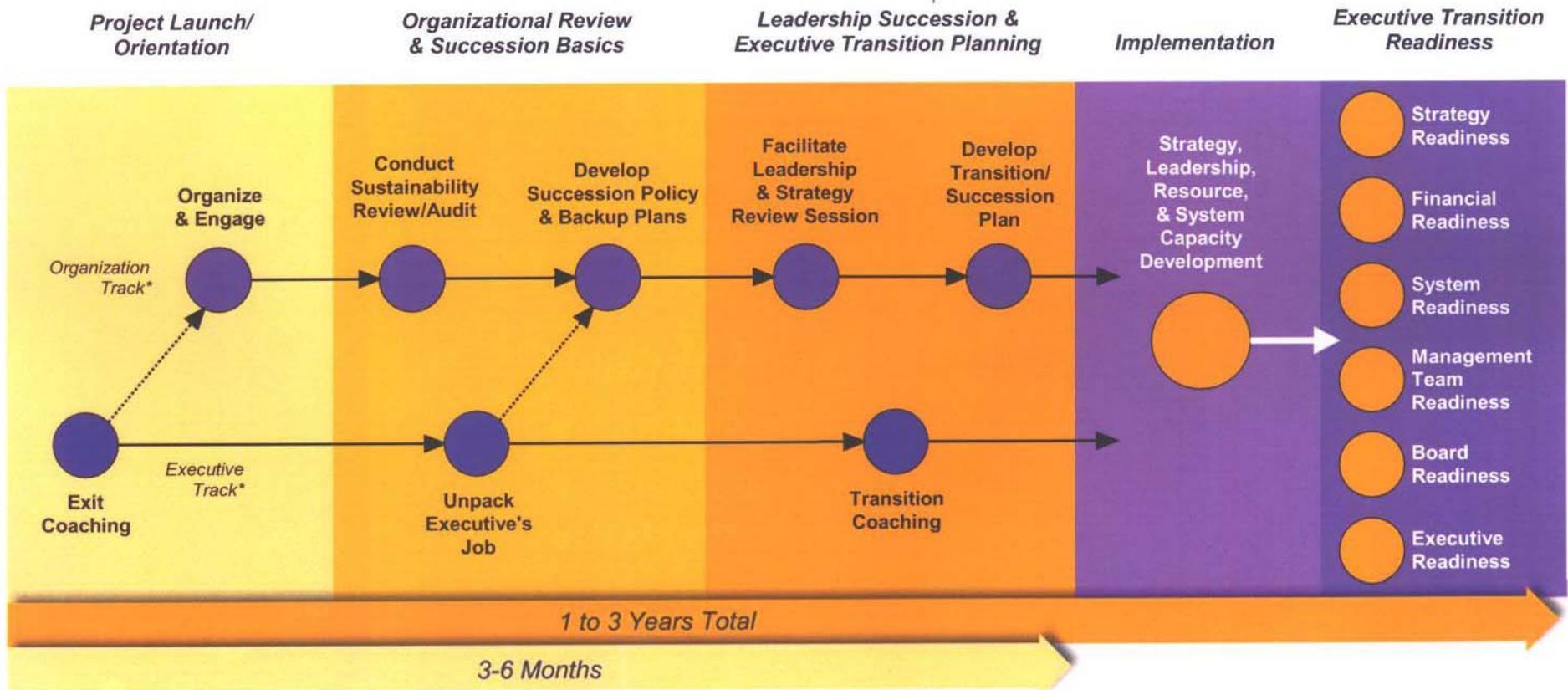
### Chief Executive PLUS Executive Team

Same as above PLUS:

- Executive Team included in the Launch/ Orientation Meeting
- Emergency Backup Plans Developed for identified Executive Team positions
- Emergency Backup Plan "At a Glance" ( overview) provided

\*Board involvement depends on the organization, in some cases it's from the beginning, in other cases it's after initial work on backup plan has been completed with the executive.

# Departure-Defined Succession Planning Process Overview



**Goal:** Increase the organization's capacity to deliver its mission under new leadership.

## Outcomes:

- Strategy, leadership, resources, management and systems are ready for chief executive transition.
- Board adopted succession policy in place, covering planned and unplanned chief executive absences.
- Emergency backup plans (including designee cross training) in place for chief executive (and management team, ideally).

*\*Executives may not want to announce their departure intentions so far in advance, or they may not have definite departure date in mind. Accordingly, the work in the organizational track can be conducted as an "Organizational Sustainability Planning" project and the executive track can be conducted as private coaching to ensure confidentiality of the executive's intentions.*

# Bridges Transition Model



Source: Bridges, William. *Managing Transitions: Making the Most of Change*. 2nd ed. Cambridge, MA: Perseus Pub., 2003.