

Leadership Transition Checklist for Boards

The first 30 days after an executive leaves

When an executive leaves, the board's job is to protect three things: **people, money, and momentum**. You don't need every answer in the first month. You need a steady hand, clear communication, and time to make the next decision well. Work through this checklist with your executive committee.

DAYS 1-3

Protect continuity

- ☐ **Name one board point person** for staff, donors, and media.
- ☐ Confirm the departure date and terms. Involve counsel if there's any agreement or dispute.
- ☐ **Secure access:** bank signatories, passwords, email, website, keys, and records.
- ☐ Tell staff in person, before anyone else hears, and say who they report to now.
- ☐ Agree on one short, consistent message for everyone outside.

WEEK 1

Steady operations

- ☐ **Name an acting leader** or begin securing an interim executive.
- ☐ Review cash on hand, payroll, upcoming bills, and loan or grant obligations.
- ☐ List what the executive was carrying: grant deadlines, events, contracts, key meetings.
- ☐ **Call your top 10-20 donors** and funders personally. Don't let them hear it secondhand.
- ☐ Request a handoff memo from the departing executive, if the situation allows.

WEEKS 2-4

Prepare for what's next

- ☐ **Decide the path:** acting leader, interim executive, or moving straight to a permanent search.
- ☐ Take an honest look at finances, staff morale, and board health.
- ☐ **Define what the organization needs** in its next leader, not just who left.
- ☐ Set a realistic timeline and budget for the full transition.
- ☐ Hold regular staff check-ins. Silence breeds rumor.

Decisions that can wait

- Changes to the strategic plan
- Major new programs, hires, or restructuring
- Naming a permanent leader before the board agrees on what it needs

Signs you need outside help

- No one on staff can lead day to day without burning out
- Finances, a campaign, or major grants are at risk
- The board is divided about what happens next

“Understand the organization first. Then lead the change it needs.”