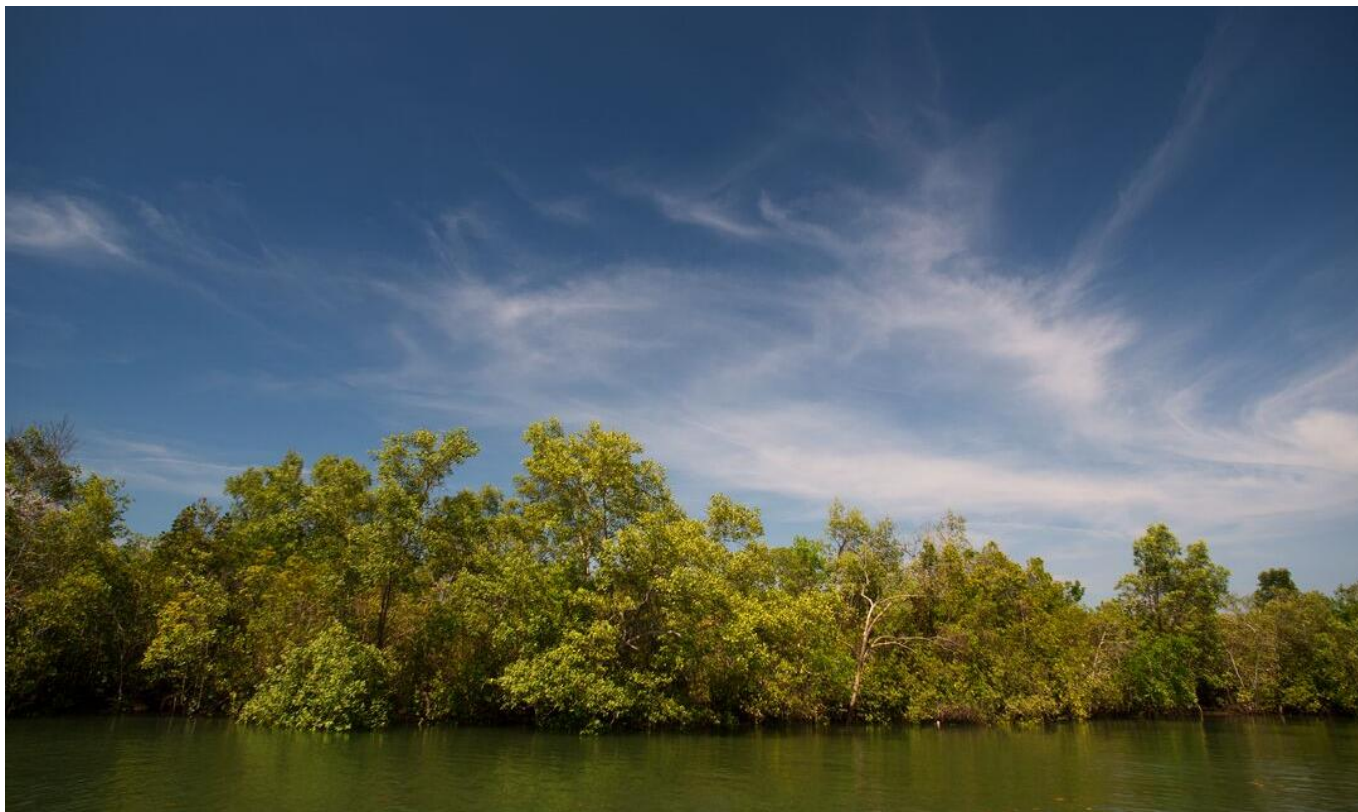




# Senior Leadership Transition Checklist



## Introduction

This document aims to support Non-Governmental Organisations (NGOs) navigating senior leadership transitions by outlining key considerations to help ensure it is a smooth process.

When referring to leadership transition, we mean a change in senior leadership in an NGO, such as the Executive Director (ED) or Chief Executive Officer (CEO). As some transitions are planned and others are not, we recognise that not all suggestions may be feasible and appropriate.

It is important to get leadership transitions right, as poor transitions can result in loss of

critical knowledge, loss of support from organisational staff and disruption across the whole organisation.

This document should be used as a reference point before, during and after a leadership transition. It should provide useful prompts and reminders of key activities which should take place to enable a smooth transition of leadership. It aims to provide brief points on what to consider in a leadership transition but doesn't aim to cover every single point in detail.

# When is it time for a senior leadership transition?

A range of factors may indicate that the time is right for an organisation to transition its senior leadership.

## Some of these reasons include:

- The current leader is planning their next step: such as a new role or retirement.
- The organisation is entering a new phase: for example, challenges it is facing have changed or new opportunities have arisen.
- New priorities require different expertise than the current leader: for example, a shift to focus on fundraising could mean a new skillset in the leader is required.
- Strong internal leadership capacity has emerged: senior staff are ready to take on greater responsibility, and the organisation has an opportunity to develop future leaders.
- The board wishes to strengthen long-term sustainability: planning a transition before it becomes urgent helps reduce disruption.
- The current leadership structure no longer meets the organisation's needs: responsibilities may need to be shared differently, or new leadership roles need to be created as the organisation evolves.
- The leader's energy, motivation, or availability has changed: recognising this early can allow for a more positive and well-planned transition.



Matt Jarvis / Fauna & Flora



Chu Xuan Canh / Fauna & Flora

# “Effective leadership transitions require thoughtfulness and preparation”

## Stage 1: Before the transition (6 months to go)

### Agree a direction and roles

- ☐ Set a timeline for the transition including milestones e.g., recruitment, key announcements and handover period.
- ☐ Agree on who will lead the transition of leadership.
- ☐ Ensure the Board is aligned, informed and prepared to support the transition effectively.
- ☐ Decide if there will be a future role for the outgoing leader:
  - ☐ Clarify boundaries to avoid role confusion.
  - ☐ Document the agreed notice period, along with current and future conflicts of interests.
  - ☐ Will they sit on the board? Could they mentor the new leader in the short term?

### Look at organisational needs

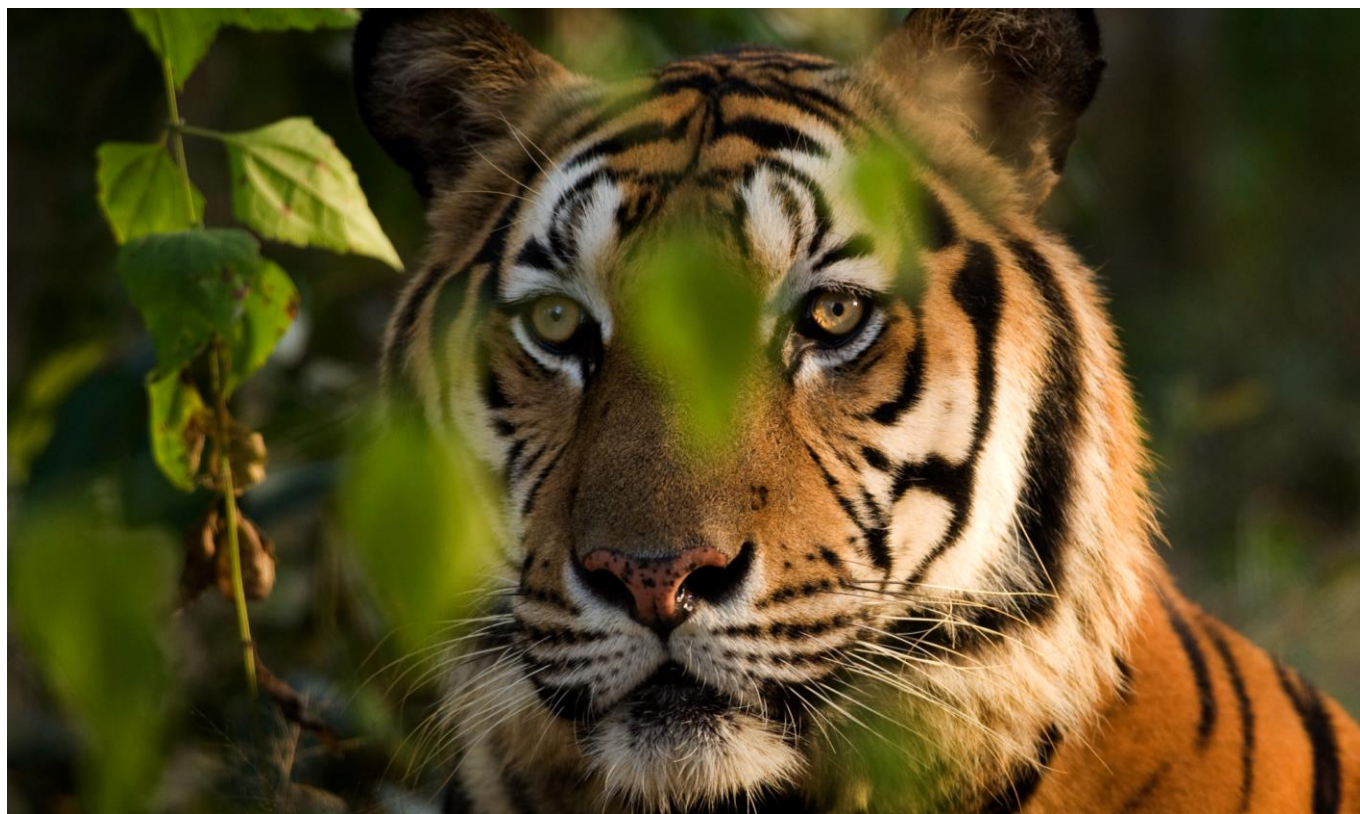
- ☐ Think about organisational strategy, culture, resources and priorities – where is it and where do you want it to be? How can the transition of

leadership support this?

- ☐ Identify what type of leadership is needed next - what qualities are required in the new leader?
- ☐ Make clear, planned decisions - aligning them with the strategy.

### Ensure stability

- ☐ Appoint interim leader if appropriate.
- ☐ Support staff wellbeing and motivation - engage them in the transition where possible by gathering ideas and input.
- ☐ Cross train staff to minimise disruption:
  - ☐ Map critical roles and responsibilities.
  - ☐ Identify knowledge gaps and where one person holds critical information.
  - ☐ Encourage skill sharing amongst staff.
  - ☐ Pair staff for shadowing opportunities.



## Stage 1: Before the transition (3 months to go)

### Plan communications – build trust and reduce uncertainty

- ☐ Agree who needs to hear about the transition e.g., staff, the board, the community, donors and partners.
- ☐ Prepare a communications plan with clear, consistent messaging for before, during, and after the transition - what needs to be communicated and when?
- ☐ Communicate transparently and in a timely way.

### Organise recruitment

- ☐ Agree an approach - internal or external candidate?
- ☐ Develop and agree a job description and salary for the role.
- ☐ Decide the recruitment panel.
- ☐ Develop a contingency plan in case recruitment fails.
- ☐ Conduct a fair and transparent recruitment process.

### Document Management

- ☐ Ensure key organisational documents are up to date e.g., strategy, job descriptions, financial records, contracts with donors, manuals for key systems, knowledge management documents and risk registers. This is business-critical knowledge.
- ☐ Ensure key files, whether physical or digital, are saved in sensible and accessible places. Label files clearly.

### Have a succession plan in place

- ☐ This is a plan that identifies how key responsibilities, knowledge, and leadership duties will be transferred if a staff member leaves their role, is absent unexpectedly, or moves to a new position.
- ☐ It allows individuals to understand how the organisation operates and learn about decision making before it is needed.



## Stage 2: During the transition

### Handover

- ❑ Plan a structured handover period for the new leader, prioritising in-person time with the outgoing leader.
- ❑ Transfer key knowledge e.g., strategic priorities, organisational history, any sensitivities or nuances to be aware of, and internal processes.
- ❑ Legal and regulatory: transfer legal and governance responsibilities by updating regulatory records, revising signing authorities and confirming that all insurance arrangements remain in place and are up to date.
- ❑ Introduce the new leader to key stakeholders (e.g., staff, community, donors, and partners) and provide clear contact details along with the preferred method of communication for each.
- ❑ Clarify decision making authority and timeframes for shifts:
  - ❑ If one does not exist, create a Delegations of Authority to clarify which roles have authority to make specific types of decisions.
- ❑ Determine and communicate when approval authority shifts to the new leader.
- ❑ Ensure access to key systems, assets and documents:
  - ❑ Bank signatory authority.
  - ❑ Understanding the file system organisation and management so they know where to find everything. This includes physical and digital files.
    - ❑ Note: This requires the outgoing leader to organise their files!
  - ❑ Physical assets: Office keys, vehicle keys, storeroom keys, and so on.
  - ❑ Other organisational accounts such as the website, shared email accounts, Microsoft Administrator account, and so on.



## Stage 2: During the transition (continued)

### Donor and Funder Management

- ☐ Provide reassurance about organisational stability, strategy, and programme delivery.
- ☐ Ensure strong relationships are transferred through introductions and handover meetings where appropriate.
- ☐ Maintain regular communication with donors and funders throughout the transition period.
- ☐ Review grant agreements and reporting commitments to ensure continuity and compliance.
- ☐ Identify donors who may be particularly sensitive to leadership changes and develop tailored engagement plans.
- ☐ Equip the new leader with key donor and funder information, relationship histories, and upcoming engagement opportunities.
- ☐ Monitor donor and funder feedback and address any concerns promptly to maintain confidence and trust.

### IT Offboarding

- ☐ Remove outgoing leader's access to organisational systems, accounts and data when they leave the organisation to reduce security risk. This includes:
  - ☐ Banking platforms.
  - ☐ Shared drives.
  - ☐ Email accounts.
- ☐ Retrieve organisational devices and IT equipment from the outgoing leader.





## Stage 3: Post-transition

### Support and embed the new leader

- ☐ Agree clear priorities for first year and develop a work plan.
- ☐ Give the new leader time to define future priorities and direction, while offering support.
- ☐ Regularly communicate and check in with the new leader.
- ☐ Support the new leader with skill development in key areas e.g., financial management.

### Clarify roles

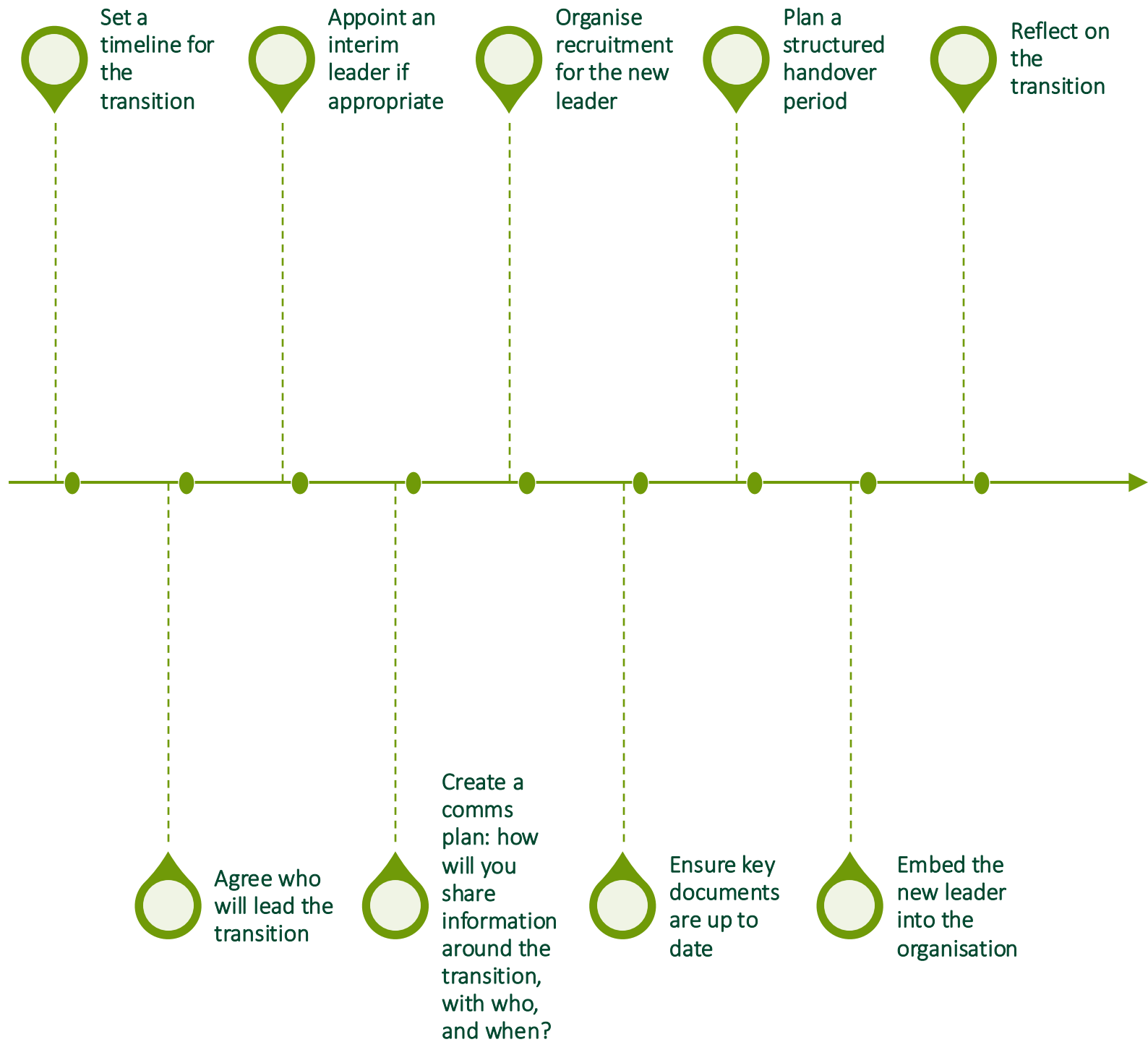
- ☐ Confirm roles and responsibilities with the new leader by ensuring they understand reporting lines, organisational structure and how people communicate.
- ☐ The new leader can build trust and confidence by:
  - ☐ Investing time in getting to know the staff and understanding their perspectives.

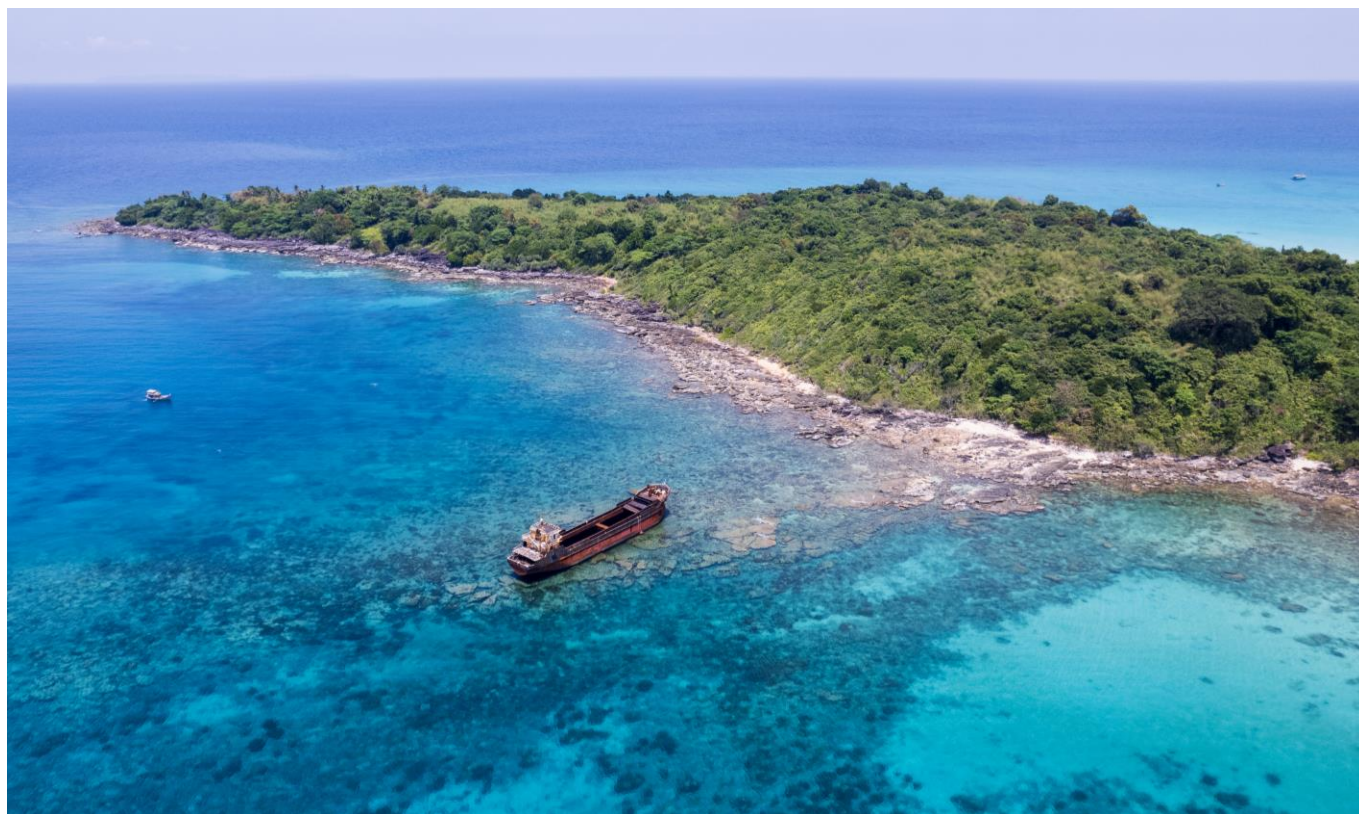
- ☐ Following through on decisions and commitments.
- ☐ Communicating clearly and regularly.

### Reflection

- ☐ Reflect on lessons learned from the transition:
  - ☐ What went well?
  - ☐ What could have gone better?
  - ☐ Capture lessons learned which could be used in the future.
- ☐ Revisit the organisational strategy and direction.
- ☐ Assess internal systems and governance - can improvements be made?

# Timeline of Key Milestones





## References

- Aguayo, M. and De Roy, T.C. (2026) 4 lessons for a smooth leadership transition. Candid. Available at: <https://candid.org/blogs/nonprofit-leadership-transition-lessons/> (Accessed: 15 June 2026).
- Maliasili (2022) *Leadership transitions – planning and preparing to get it right*. Available at: <https://maliasili.org/reader/2022/09/leadership-transitions-planning-and-preparing-to-get-it-right> (Accessed: 7 July 2026).

## Additional Resources

- Succession Planning - by the National Council for Non-Profits  
<https://www.councilofnonprofits.org/running-nonprofit/governance-leadership/succession-planning-nonprofits-managing-leadership>
- Case Studies from NGOs in Uganda -  
<https://static1.squarespace.com/static/593ea10db8a79bc4102e122f/t/620f64d10c701728748dbe1e/1645176085750/NGO+-+ETSP+5-Report+NEW.pdf>

***This resource was developed by Fauna & Flora, as a result of desk research and the valuable contributions, insights, and feedback of colleagues and partners working across the sector, including Ceris Jones, Chloe Hodgkinson, Janete Agues, Kristian Teleki and Litoney Oliveira.***

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