

Sample Transition Planning Calendar

<h3>September</h3> <ul style="list-style-type: none"> • Fall: Recruitment and transition process formally begins • Spring: Prior leadership should have all transition documents ready and organized in shareable online folder • Both: Actively discuss transition process and perform group check-in 	<h3>October</h3> <ul style="list-style-type: none"> • Fall: New leaders selected + begin onboarding; create leadership transition committee • Spring: Transition committee should hold a monthly meeting in order to discuss • Both: Perform group check-in to make sure everyone is invested 	<h3>November</h3> <ul style="list-style-type: none"> • Fall: Send email to prior leadership team members to assistance • Spring: Start finalizing recruitment timeline and documents needed for transition process • Both: Review culture and expectations are clear 	<h3>December</h3> <ul style="list-style-type: none"> • Fall: Hold first meeting of transition team and create benchmarks for the new year + how to measure outcomes • Spring: Start sending out recruitment documents and hold transition meeting to finalize onboarding process 	<h3>January</h3> <ul style="list-style-type: none"> • Fall: Following break period, leaders should have a formal check-in with their leadership team • Spring: Begin formal review and interview process for new leaders + prior leaders interested in returning 	<h3>February</h3> <ul style="list-style-type: none"> • Fall: Leadership team should check-in on organization documents, especially regarding transition • Spring: Continue interview process for applicants; be sure to clearly convey organization culture and values at this time
<h3>March</h3> <ul style="list-style-type: none"> • Fall: Hold a meeting of the leadership transition committee to set benchmarks • Spring: New leaders selected + begin onboarding; create leadership transition committee 	<h3>April</h3> <ul style="list-style-type: none"> • Fall: Start finalizing recruitment timeline and documents needed for transition process • Spring: Send email to prior leadership team members to assistance • Both: Review culture and expectations are clear 	<h3>May</h3> <ul style="list-style-type: none"> • Both: <i>Major programs likely occurring in May or June</i> • This is a busy time for organizations, but transition teams should still try to meet once this month 	<h3>June</h3> <ul style="list-style-type: none"> • Both: <i>Major programs likely occurring in May or June</i> • This is a busy time for organizations, but transition teams should still try to meet once this month 	<h3>July</h3> <ul style="list-style-type: none"> • Both: Perform review of previous year's org performance • Fall: Start sending out recruitment documents and hold transition meeting • Spring: Hold a meeting of the leadership transition committee to set benchmarks 	<h3>August</h3> <ul style="list-style-type: none"> • Fall: Start sending out recruitment documents and hold transition meeting to finalize onboarding process • Spring: Hold transition committee meeting to discuss benchmarks and onboarding planning