



Leadership Transition & Succession Planning

A Proposed Process Framework

This framework outlines a 12-18 month process for managing leadership transitions - from preparation through to post-transition support. It is a guide, not a rulebook; we encourage you to adapt it to your organization's context.

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About This Framework

Every organization will face a leadership change at some point. The ones that come through it well are usually those that started planning before they had to.

Without a plan, a transition puts pressure on everything at once - programs, funder relationships, staff stability, and the board. With a plan, the same pressures can be worked through in sequence and with intention.

This framework maps out a proposed process for managing a planned leadership transition over 12-18 months. It focuses on the Executive Director role, which tends to carry the highest level of risk in any civil society organization. The same approach applies to any senior position where one person's departure would leave a real gap - Finance Director, Programs Director, Head of Communications, or any role that carries significant institutional knowledge or external relationships. Adapt it accordingly.

Not every step here will apply to your organization. Some may need to happen in a different order or at the same time. This is a guide, not a prescription.

For a working version of this framework - with dates that calculate from your new ED's expected start date, progress tracking by owner and status, a one-page board report, and a built-in risk register and handover tracker - contact us at refined@refined.co.tz.

Phase 1: PREPARATION · Month 1-3

Activity	Guidance / Details
Week 1-4 Initial Assessment and Planning	
• Draft a Succession Plan	Outline key steps, timelines, and responsibilities. Secure board buy-in and approval.
• Conduct a Needs Assessment	Review organizational goals, challenges, and future direction. What sort of leader is needed in the upcoming phase?
• Stakeholder Consultation and buy-in	Engage board members, senior staff, and stakeholders for input.
• Engage Staff	Determine when to inform staff about upcoming changes.
• Form board recruitment committee	They will lead the process on behalf of the Board (internal and external).
• Risk assessment	Identify potential risks and consider how to manage them.
• Recruitment Process	Agree how recruitment will be handled - fully internal? With a consultant? By a recruitment agency?
• Resourcing	Develop a budget for recruitment and determine how the succession process will be financed.

Activity	Guidance / Details
Week 5-8 Job Description and Profile	
• Engage with Outgoing ED	Details of the role, current pain points of the job, separating the ED's personal profile from the organization.
• Review and Update Job Description	Reflect on current and future organizational needs. Can the role be done by one person? Replacing founding EDs is tricky.
• Define Candidate Profile	Identify key qualifications, experience, and attributes.
• Board Approval	Get the job description and candidate profile approved by the board.
• Support to Outgoing ED	Discuss what the outgoing ED will be doing upon leaving and determine the level of support required.

Phase 2: RECRUITMENT · Month 4-6

Activity	Guidance / Details
Week 9-12 Recruitment Strategy	
• Announcement	Make the announcement about the current ED's transition out of the organization.
• Develop Recruitment Plan	Decide on internal/external recruitment, advertising strategies, and selection process.
• Advertise the ED Role	Use targeted platforms, including feminist networks and job boards. Traditional media? Social media? Headhunting?

Activity	Guidance / Details
Week 13-16 Candidate Selection	
• Shortlist Candidates	Screen applications against the job description and candidate profile.
• Conduct Interviews	Include board members and senior staff. Multiple rounds if necessary.
• Reference Checks	Verify candidates' backgrounds and gather references.

Phase 3: SELECTION & NOTICE PERIOD · Month 7-9

Activity	Guidance / Details
Week 17-20 Final Selection	
• Board Approval	Present final candidates to the board for the decision.
• ED Learning Plan	All candidates will have capability gaps. Develop a learning plan for the incoming ED to work on any areas required.
• Offer and Negotiation	Extend an offer to the selected candidate, negotiate terms, and finalize the contract.
Activity	Guidance / Details
Week 21-24 Notice Period	
• Candidate Notice Period	Allow the selected ED time to serve their 2-3 months' notice.
• Engage Partners	Engage funders and key partners about the upcoming change; assure them of continued robustness, board stability, and performance.
• Prepare Onboarding Plan	Outline a plan for bringing the new leadership onboard in a thoughtful, phased, and organized manner.

Phase 4: ONBOARDING & TRANSITION · Month 10-12

Activity	Guidance / Details
Week 25-28 Pre-Onboarding Preparation	
• Announcement	Make the formal announcement about the incoming ED, after agreement with their current employer.
• Create Resource Binder	Include strategic documents, organizational charts, key contacts, and ongoing projects. This should already exist for all staff.
• Induction Planning	Schedule initial meetings with key stakeholders and a formal welcome with the Board.

Activity	Guidance / Details
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Week 29-32

Onboarding Begins

• Formal Onboarding	Start with induction sessions and meetings with staff. Invite the new ED to address the team and set the tone of their leadership.
• Introductions	Organize a coffee morning with key partners; make the introductions in a relaxed setting if possible.
• Set Initial Goals	Define short-term goals for the new ED.

Activity	Guidance / Details
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Week 33-36

Gradual Responsibility Transfer

• Shadowing Period	The new ED shadows the outgoing ED in key meetings and processes.
• Gradual Handover	Begin transferring non-critical tasks.

Phase 5: CO-LEADERSHIP & TRANSITION · Month 13-15

Activity	Guidance / Details
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Week 37-40

Co-Leadership Model

• Joint Leadership	The outgoing and incoming EDs share responsibilities, with increasing leadership taken on by the new ED.
• Regular Check-ins	Conduct regular meetings to review progress and address any issues.

Activity	Guidance / Details
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Week 41-44

Final Handover

• Complete Responsibility Transfer	The new ED takes full responsibility by the end of the three-month overlap period.
• Farewell Event	Organize a farewell event for the outgoing ED to honour their contributions. Can be a standalone event or joint with something else.

Phase 6: POST-TRANSITION SUPPORT · Month 16+

Activity	Guidance / Details
Week 45-48 Initial Evaluation	
• Review Performance	Evaluate the new ED's initial performance and integration into the role. Use the probation period well to assess any challenges before it is too late.
• Support Mechanisms	Provide ongoing mentorship and support as needed. Engage a coach to assist the process if required - this can be helpful for first-time EDs.
Activity	Guidance / Details
Week 49-52 Continuous Feedback	
• Regular Check-ins	Schedule periodic reviews with the board and senior staff to ensure alignment with organizational goals.
• Adjustments and Support	Address any challenges or support needs identified during the early months.
• Support to Former ED	As appreciation, the organization may consider offering the outgoing ED some support as they step into their new role outside the organization.

This planning framework has been prepared by Refined Advisory and serves as a guide. It does not claim to be exhaustive, nor to cover all legal or statutory requirements of an employment transition. Please consult the necessary authorities and specialists for additional guidance on statutory compliance.