

## Leadership Transition Worksheet: Self Reflection and Transition Planning

For use by the outgoing Executive Director

### Section 1: What Are Your Most Proud Of?

Reflecting on your tenure as an executive director, list the five accomplishments you are most proud of and explain why:

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How would you like to be remembered by organizational members and the community or constituencies you serve?

### Section 2: What Do You Want To Accomplish Before Leaving? And Why?

The leadership transition statement represents your personal vision and aspiration for what you wish to accomplish (organizationally *and* personally) before your final exit as the leader of your organization. The legacy statement speaks to the “results” you desire to achieve.

The idea is to “begin with the end in mind.” Imagine that you have resigned as leader. You are at your farewell party, staff, friends, family, colleagues, are all present. The board chair of your organization comes up to the podium and says, “I’d like to commend our leader for her/his legacy- the outstanding results she/he has achieved during her/his tenure.

Take a moment to reflect on what other goals you want to achieve before leaving the executive director position.

**Organizational Goals:**

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**Personal/Individual Goals**

What personal needs must you address and plan for so you can transition effectively? (e.g., new job, job search strategy, career coaching, health insurance, sabbatical period or vacation, retirement planning, etc.)

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**What concerns, challenges or obstacles might get in the way of an optimal transition?**

**What strategies can you employ to address concerns?**

**What additional supports or resources will you need for an effective transition?**