

SAMPLE
Executive Search & Transition Time Line Worksheet

Activity	Responsibility	Target Date(s)	Est. Committee or Board Time Commitment
Conduct Transition Committee Project Launch Meeting	Trans Committee & TransitionGuides	Week 1	1 hour
Conduct Board/Staff/Stakeholder Surveys & Interviews, Review Key Documents	TransitionGuides	Week 1-2	-
Conduct Transition Planning Session #1 w/ Staff	TransitionGuides	Week 2	-
Conduct <i>Strategy and Leadership Review</i> Session #1	Board - Facil by TransitionGuides	Week 3	2.5 to 8 hours
Develop Position Profile, Search Plan & Ad Copy	TransitionGuides	Week 3	-
Review & Finalize Profile & Search Plan (Meeting or call)	Trans Committee – Facil by TransitionGuides	Week 4	1.5 hours
Launch the Search	TransitionGuides	Week 5	-
Conduct Recruiting Outreach	TransitionGuides	Week 5-13	
Receive Resumes, Vet Promising Candidates, etc.	TransitionGuides	Week 5-13	-
Provide Search Updates (email)	TransitionGuides	Weekly During Search	-
Search Check in Meeting(s) or Calls	Trans Committee & TransitionGuides	Week 8	45 minutes
Conduct Resume Review Meeting (Call)	Trans Committee – Facil by TransitionGuides	Week 11	1.5 hours
Round 1 Interviews	Trans Committee – Facil by TransitionGuides	Week 13	~8 hours
Conduct Second Transition Planning Session #2 w/ Staff	TransitionGuides	Week 14	-
Site/Office Visit & Meet with Staff	Semifinalists Facil by TransitionGuides	Week 14	-
Conduct Final Reference Checks	TransitionGuides	Week 14	-
Round 2 Interviews	Exec or Trans Committee Facil by TransitionGuides	Week 15	4-6 hours
Meeting to Ratify Selection	Board Facil by TransitionGuides	Week 17	1.5 hours
Finalize Offer	TransitionGuides	Week 17	-
Notice Period (Executive Gives Notice to Current Employer)	-	Week 18	-
Plan On-boarding Process	Trans Committee Facil by TransitionGuides	Week 18	1 hour
Announce Appointment	Staff - Guided by TransitionGuides	Week 18	-
New Chief Executive's Start Date	-	Week 22	-
Implement Orientation Plan	New Chief Executive w/ Members of the Exec. Committee & Mgt Staff		-
Complete 90-Day Plan	New Chief Executive Facil by TransitionGuides		-
Conduct <i>Strategy & Leadership Planning</i> Session #2	Chief Executive & Board Facil by TransitionGuides		2-4 hours
Conduct 90-Day Check-in	Board Chair		1.5 hours
Conduct Six-Month Evaluation	Executive Committee		3 hours
Conduct Annual Performance Evaluation	Executive Committee		4 hours

Developed by and used with permission of TransitionGuides (www.transitionguides.com). For information about their services, contact Megan Lewis (301-439-6635 or mlewis@transitionguides.com).