

SECTION 1

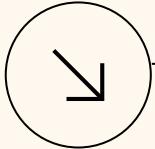
All About Work Transitions

“We resist transition not because we can't accept the change, but because we can't accept letting go of that piece of ourselves that we have to give up when and because the situation has changed.”

— William Bridges, *The Way Of Transition: Embracing Life's Most Difficult Moments*



About This Resource



The Human Side of Workplace Transitions was written by Liz Weaver, a former co-CEO of the Tamarack Institute for Community Engagement. Over her 15 years at Tamarack, Liz experienced many transitions in roles and responsibilities, ending with a final transition to retirement.

Published in collaboration with the Tamarack Institute, this guide helps individuals and employees navigate the logistical and emotional challenges of workplace transitions, whether you are moving to a new role, switching companies, or retiring from the work world.

This section explores the different types of transition journeys, noting that while each is unique, they share common patterns that can guide effective planning. Successful transitions require balancing technical steps with attention to emotional experiences, making space for reflection, self-care, and overall well-being. By recognizing both the challenges and opportunities that emotions bring, and using the reflection tools provided, you can better lead yourself through change with awareness and resilience.

All About Transitions

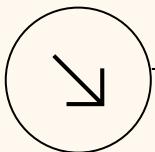


This section highlights different types of transition journeys. Each transition is unique; however, all include technical processes as well as emotional experiences. Each of the transition types has patterns that can be useful to understand as you build a successful transition plan for yourself.

Remember to build into your transition process sufficient time for reflection and self-care which means building in practices which ensure your social, emotional, mental and physical well-being. There are a number of reflection tools and questions in this document to support your reflection time.

Knowledge is power. Review this section to learn about different transition journeys and how you can be the leader of your transition. The different emotions, both positive and negative, that typically come up as you navigate the changes of your transition are also highlighted. We often ignore our emotions, preferring to get on with the transition work, but emotions are real and ignoring them can keep us on or take us off track.

Different Transition Journeys

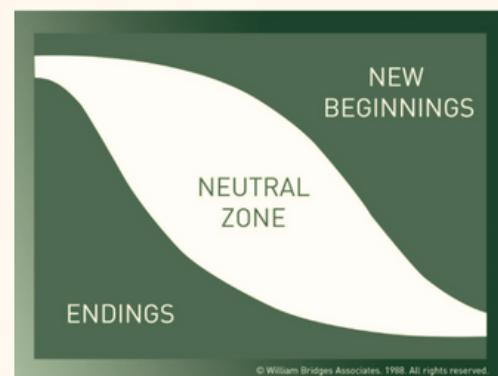


Transition journeys are individual and unique. William Bridges published a [transition model](#) with three stages: endings, neutral zone and new beginnings. Bridges describes transitions as the inner psychological process that people go through when they internalize and come to terms with the change that is in front of them. Bridges also notes that change is only successful if the transition that a person is experiencing is recognized, thoughtful and planned.

In the Bridges Transition Model, all transitions start with an ending of some sort. It begins when a person understands that they are ending something and beginning to determine what will be next for them. Endings contain a mix of emotions – sadness, regret, excitement and hope. The neutral zone comes after the ending and involves creating processes to move toward the next phase of new beginning. New beginnings include new understandings, values, attitudes and energy toward the new direction.

The Bridges Transition Model is a useful way for framing for the employment transitions.

- 1 TRANSITIONS LED BY YOU**
- 2 TRANSITIONS LED BY THE ORGANIZATION**
- 3 MUTUAL AGREEMENT TRANSITIONS**
- 4 TERMINATION**



<https://wmbridges.com/about/what-is-transition/>

Transitions Led by You

Securing new employment is what most of us consider to be the only type of transition we navigate. But there are many other examples of employment or personal transition processes. Some other types of transitions are short-term with an individual returning to the organization after a break. These short-term transition may include breaks because of health-related issues or family changes. For many people, the only prolonged "break" they may get is during parental leave. There are a lot of emotions contained in this one – especially as you come back to work and realize things have changed. The organization has moved on without you. You also may struggle with everything from child care to finances to feeling vulnerable.

Other transitions might be forced because the organization is experiencing financial pressures or shifting priorities. In some cases, forced transitions also might include the termination of employment. You have the choice to act during a forced transition. Finally, there is the transition from work into retirement. All transition journeys bring a mix of emotions for the person experiencing the transition.

Most of us think that moving on to a new job either inside or external to the organization is a positive transition. While you might feel excited about the new role you are moving toward, you may feel anxious about adapting to the new role. You might also experience the sadness of leaving colleagues and partners with whom you have built relationships and collaborated on shared outcomes.

For some of you, this change of employment is not a positive experience. You could be feeling forced out of the organization or obligated to take on the new role or position within your organization. You might be feeling frustrated and powerless. In some case, you might feel like the choice has been taken away from you.

Another transition is moving from the world of work into retirement. Again, there is a mix of emotions experienced through this process. Many experience anticipation, relief, worry, excitement and grief. If you are highly connected to your organization and role, you might experience a loss of identity and belonging.

While retirement seems like a positive change, for some, retirement also comes with personal or family financial burdens and a loss of identity. In Canada, the current life expectancy is 79 years. Depending on your age and health, planning for retirement means having a longer term vision for the activity and financial expectations you face over the next 15 to 20 years.

Transitions Led by the Organization

Forced transitions are often viewed as negative. Forced transitions may include being fired, downsized, having to take on a new internal role or offered an early departure package from the organization. Some forced transitions are a surprise while others are ones that we may have anticipated but were not proactive in our response.

As an employee, it is important to understand and connect with the shifting priorities and finances of your organization and department. Is the organization growing and changing? Are there internal or external financial pressures on the organization which might signal changes in human resources? What do these pressures mean for me and my role? How might I mitigate these pressures? How can I be proactive in understanding the impact of organizational pressures on my current employment?

The emotions wrapped up in a forced transition are again mixed. There is the shock of being fired or forced into a new role, the grief and loss, and then the anticipation and uncertainty about what might be next. If the forced exit transition includes a financial package and benefits, use the benefits, if available, to access legal advice, coaching and well-being supports.

Forced transitions can also include organizational changes which impact your employment in a direct or indirect way. For example, a new CEO, supervisor or colleagues join your organization or team. While we may not consider these changes as transitions, they will result in changes which have to be navigated and new roles that may need to be negotiated. These organizational changes may unleash the emotions of uncertainty, anticipation and fear, can also uncover power dynamics.

Mutual Agreement Transitions

Another type of transition experience is taking a parental, health, or sabbatical leave from the organization. This experience can again be both positive for some and negative for others. Parental, health or sabbatical leaves provide a time away from the organization and for many, a spiritual and mindful break.

For many new parents, parental leave is both the happiness of a new family member but also the worry and concern of being a parent. Most parental leave is taken by mothers who experience a break from the organization and reflection time. According to Statistics Canada, in 2022, 94% of mothers versus 47% of partners claimed or intended to claim parental benefits. While fathers and partners are encouraged to claim parental leave fewer of them take this opportunity. This means that fewer men and parental partners have the opportunity for reflection and stepping away from work responsibilities.

Health and caregiving leaves are also challenging. Some employees may benefit from short and long term disability benefits which can support them financially. However, others might experience significant financial pressures which, combined with their health or caregiving issues, creates stress on them and impacts their health or caregiving responsibilities. This means navigating the emotions of uncertainty, fear, stress and empathy.

Many organizations will have policies to navigate the human resource implications of an employee experiencing a health or caregiving challenge. Connect with your human resources department to boost your understanding of current policies and practices.

Sabbatical leaves can create the space for reflection but are often tempered with maintaining a connection with the organization and team. The focus on reflection and renewal can often be clouded with the frustration of obligation.

Navigating transitions requires you to navigate the intersecting streams of emotions with the process of change. Paying attention only to one of the streams will impact the other. Acknowledging emotions is the human side of the transition and will aid in the process side.

“In other words, change is situational. Transition, on the other hand, is psychological. It is not those events, but rather the inner reorientation and self-redefinition that you have to go through in order to incorporate any of those changes into your life. Without a transition, a change is just a rearrangement of the furniture. Unless transition happens, the change won’t work, because it doesn’t “take.””

— William Bridges, *Transitions: Making Sense of Life's Changes*

A Note about the role of Boards of Directors in transition processes

If you are an Executive Director or Chief Executive Officer in a non-profit organization, your employer is the Board of Directors. There are resources available to support a non-profit Board of Directors in designing and planning for senior leadership transition. If you are the Executive Director or Chief Executive Officer (CEO), you may want to familiarize yourself with these resources.

Bridgespan, a US consulting firm, has developed a [nonprofit CEO transition Resource Centre](#) with online tools and resources to support organization think about and plan for the transition process.

[Boardsource](#), a nonprofit resource hub has also published resources [about executive transition and succession planning](#). They acknowledge that change at the executive level in a nonprofit organization requires strong board leadership and direction as the organization and board contemplate what it needs from its next Executive Director or CEO. Boardsource and others suggest that the succession planning conversation should happen during regular performance conversations with senior management so that risk and surprise is minimized.

Understanding Emotions and Self Care



Emotional intelligence is our ability to understand, use, and manage the emotions we are experiencing. Emotional intelligence involves self-awareness, self-regulation, social awareness, motivation, empathy and social skills. An article by the Harvard Business Review on emotional intelligence reveals that only 10 -15% of a cohort studied were truly self-aware.

The article identifies the differences between individuals with low and high emotional intelligence.

People with low emotional intelligence:

- Often feel misunderstood
- Get upset easily
- Become overwhelmed by emotions
- Have problems being assertive

People with high emotional intelligence:

- Understand the links between their emotions and how they behave
- Remain calm and composed during stressful situations
- Are able to influence others toward a common goal
- Handle difficult people with tact and diplomacy

Further, the article suggests three steps to improve emotional intelligence including recognizing your emotions and naming them, asking for feedback and gain insights from interactions with others. Building empathy with others by understanding their thoughts, motivations and actions is key.

Another way to consider emotional intelligence is to understand the factors which increase the ability to navigate your personal emotional capacity. The following table is sourced from a Thrive Global post about emotional intelligence.

Self Awareness	Self Management	Social Awareness	Relationship Skills	Decision Making
Identifying & expressing emotions	Managing emotions	Diversity appreciation	Conflict resolution	Identifying & solving problems
Self esteem	Self discipline	Respect for others	Active listening	Goal setting
Mindfulness	Resilience & grit	Empathy	Collaboration & teamwork	Leadership skills

<https://community.thriveglobal.com/emotional-intelligence-vs-iq/>

Effectively navigating a transition process requires self-awareness, self-management, social awareness, and building or deepening relationships and decision making skills. Navigating emotions is also about building in time for reflection and self-care. Remember to schedule self care into your transition process. This can be time for reflection, getting outdoors, physical activity, scheduling breaks and participating in counselling or coaching if it is available.

Understanding your emotions requires vulnerability and can lead to greater anxiety as you move into the unknown of what is next for you. Vulnerability and uncertainty are not necessarily integrated into leadership roles. Instead, the dominant form of leadership requires us to have the answers and set directions which is the opposite of being vulnerable. Furthermore, vulnerability and uncertainty are often experienced alone. Reaching out to others, connecting with trusted colleagues and allies, building and deepening supportive relationships can be key to navigating the uncertainty of the transition experience.

This resource highlights opportunities for you to connect with and navigate your emotions during the transition process. It also includes opportunities to connect with trusted allies and seek their advice. Emotions are real. Emotions can hamper your focus and draw you into negative situations. We are human and navigating our emotions effectively during times of change can shift our thinking and impact our process.

Emotions & the Practice of Self-Care

The practice of self-care includes activities that nurture our physical, mental, emotional and spiritual well being. Self-care is about creating and maintaining a healthy and balanced life and might include activities like exercise, spending time with friends and family, engaging in hobbies and quality sleep. It may also include opportunities for self-reflection as well as the intentional recognition of your transition journey in some meaningful way. Self-care requires being intentional about creating greater balance by identifying and managing physical, social, mental, spiritual and emotional elements. It is the conscious act of increasing capacity for resilience and navigating the transition process.



Building your transition plan

Consider your individual career path and transitions you have participated in already. Are you planning a role change or transition in the next year or two years? This resource is designed to support you to more mindfully plan for your transition.

The resource details the critical phases in the transition process:

- What to do in the pre-transition phase including the reflections and preparations that can help you identify what you need to proactively guide your transition
- What to consider across longer (three month) or shorter (three week) transitions – with specific tasks and reflections identified for each month
- What to consider in the post-transition phase and how to build self-care into the process

This resource focuses on the human side of the transition process. There are a myriad of tools and resources which support the technical aspects of transition planning, some of which are available at the end of the resource. Very few of these resources focus on supporting the human side of transitions. A reflective and planned transition process will help you navigate the ups and downs of departing an organization and facing forward.

I hope you will find this resource helpful. Remember that transitions, like any kind of change, can be a positive experience if you are mindful and focus on those elements which you can control. This way, you can build a proactive and positive leadership journey and transition experience.

Don't wait for the inevitable, begin your transition practice and plan now.

Final Thoughts & Reflections

This resource emerged from my reflections about my recent transition from the Co-CEO of Tamarack, where I had worked for fifteen years. It has also been shaped by the input and insights of many individuals who have also recently navigated their own employment transition process or are currently in one of the stages of employment transition. I am grateful to them for their suggestions, enthusiasm, and for their contributions. The conversations we had have affirmed that this is a resource that is both timely and helpful.

While each employment transition journey is unique, they all share common patterns that highlight opportunities to maximize opportunities and minimize the challenges that often emerge during these times, and can be navigated more effectively with the benefit of can be more effectively navigated with thoughtful reflection and planning. The intention of this resource is to provide you with tools, approaches, and resources that will help to make the employment transition journey easier and increase the likelihood that it will offer better outcomes for both employees and organizations alike.

Workplace transitions require courage and honesty as you navigate some of the more challenging reflection questions. Transitions are often uncomfortable because they require that we navigate the space between what is known about our current employment role and what is unknown and untested in our future. This resource offers a roadmap to guide your transition journey in ways that builds resilience by offering practical suggestions designed to help us to manage the current and be proactive about the future while ensuring that our employment transitions occur on the best possible terms.

The exercises and questions which invite reflection on your unique contributions and skills are important for both the organization you are leaving and for you as they help to inform and clarify your future ambitions. The intentional focus on self-reflection, combined with connecting to trusted allies supports you to navigate the grief and loss you might feel during the employment transition process.

I learned many lessons during my employment transition as a senior leader at Tamarack. I anticipated, and was also surprised by, how difficult it was to manage my emotions at times. It has also left me with a deeper appreciation that emotions are real and a natural part of the process. I had trusted allies that I turned to who helped me think through what I was feeling and provided sound advice and direction. Employment transitions can be challenging and difficult, but they also provide us with a time to reflect, renew and re-engage.

I wish you well on your transition journey. Let me know what you liked or what you might change about this resource. Your employment transition experience will help others in their journey.

Liz Weaver

Are you involved in a workplace transition? Are you seeking additional support and guidance?

Over the past several years, I have provided coaching services and supports to individuals navigating their workplace transition journey. Connect with me to discuss your transition, by emailing me at lizcweaver@outlook.com. We will discuss your workplace transition and develop a solution and path that is personal and customized.

Gratitude and Acknowledgement

The following individuals contributed to the development of this resource. I am grateful for their wisdom.

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Additional Transition Resources

There are many online resources designed to support individuals through a transition process. Below is a selection of resources that might be helpful to your transition journey.

On-boarding Resources:

- Indeed: [New Hire Onboarding Checklist](#)
- Harvard Business Review: [A Guide to Onboarding New Hires \(For First Time Managers\)](#)
- SHRM: [New Hire Integration: Start Here when Onboarding a New Employee](#)
- RUNN – [The first 90 days – Summary and Tips for \(New\) Leaders](#)

Off-boarding Resources:

- Bamboo HR: [3 Offboarding Best Practices every HR Expert should Know for 2025](#)
- Academy to Innovate HR: [Offboarding Employees: A nine-step process](#)
- ADP: [Offboarding](#)

Reflection Questions Resources:

- Harvard University: [10 Coaching Questions that Work in any Conversation](#)
- Bite Size Learning: [101 coaching questions to ask your team members](#)
- On Strategy: [Leading Questions: 10 examples and 5 powerful benefits](#)

Navigating Emotions Resources:

- LinkedIn: [A Compassionate Guide to Navigating your Emotions, Especially during darker days](#)
- Calm: [The Feelings Wheel: Unlock the power of your emotions](#)

Managing Change Resources:

- Harvard Business Review: [Managing yourself: 5 ways to bungle a job change](#)
- Indeed: [7 steps for how to decide whether to change jobs](#)
- Better Up: [7 things to consider when changing jobs](#)

Executive Transition Resources:

- Bridgespan: [Nonprofit CEO Transitions Resource Centre](#)
- Harvard Business Review: [Learn to get better at Transitions](#)
- Stanford Social Innovation Review: [The Five Stages of Founder Transitions](#)
- Stanford Social Innovation Review: [Making Founder Succession Work](#)