

SECTION 2

Pre-Transition Reflection & Planning



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 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 emphasizes the importance of thoughtful reflection and planning before making a transition, much of which happens outside the formal employer relationship. While some may choose to share plans early with supervisors or boards, the key is to take time to explore options, both within and beyond current employment. Equally important is prioritizing self-care and seeking support from trusted allies and personal connections to help guide and ground your next steps.

Pre-Transition Reflection & Planning



This section highlights the steps to take which are integral to transitions but will largely sit outside of your relationship with your employer. I spent a year reflecting about what was next for me in my transition from employment before I submitted my letter of resignation. In earlier conversations with Tamarack's board of directors, I had let them know about my plans. This is not the case for everyone but it is good practice to let your immediate supervisor know your workplace growth and development plans and how these align with the organization.

In the pre-transition phase, many of us reflect on the options that we have available both within and outside of our current employment. But we often skip important elements like self-care and connecting with trusted allies and personal connections about our future.

Pre-Transition Reflection & Planning



The pre-transition phase is an opportunity to reflect and prepare for a transition you might be planning or one that you instinctively know is happening within your workplace. Leaders should be proactive and engaged in their workplaces. This can include actively participating in team meetings, regularly reviewing core organizational documents including strategic plans, financial reports and annual reports. Identifying how your current role contributes to the success of the organization and to your own personal growth and skills. Be in tune to the shifts and changes happening within your work environment. Who are the key leaders? What shifts are you noticing? Are these shifts presenting an opportunity or signalling significant change within the organization?

The pre-transition phase can occur at any time in your career. This phase helps to establish a practice of self-reflection that is useful at all stages of your career and allows you to give you adequate time and perspective to consider both your current role and the possibilities that transitions present.



Paying Attention to Employment Trends

Paying attention to what is happening within your workplace and the broader employment environment makes good sense. Consider internal factors like who is being hired, who is leaving the organization, and what layoffs or promotions are happening. Also consider external employment factors including the larger economic and social environment and the influences that might shift the external environment. These employment trends will not only impact you and your workplace, they will also have an impact on your external partners and their workplaces.

The 2025 survey of charitable sector leaders by the [Charity Insight Canada Project](#) (CIPC) found that there was fading optimism in the charitable sector in Canada. The top challenges faced by charities were reported as financial instability and funding (88%), global economic uncertainty (55%), talent retention and recruitment (47%) and changing donor expectations (34%).

The CPIC survey also identified that only 14% of charities reported having a well-prepared succession plan for leaders within their organizations. Respondents identified the following concerns which are evident during leadership transitions:

- Loss of institutional knowledge: 37%
- Board and governance challenges: 27%
- Disruptions in strategic direction or priorities: 26%
- Staff morale and retention challenges: 21%
- Funding uncertainty or donor concerns: 17%
- Other challenges (e.g., poor onboarding, hostile staff, lack of documentation): 11%
- No major challenges reported: 20%

In some cases, trends within the organization may have negative impacts on employees. These can be internal shifts such as different priorities, decreases in funding and new leaders. They can also be external trends including funding and shifting priorities. The pressures facing organizations may result in a decrease in the number of employees or to significantly shift roles and responsibilities of employees.

In a keynote and article [Committed to the Team, Committed to the Mission](#), Elizabeth Cannon explored the impact of change on Canadian organizations. Cannon noted that up to 70 % of change initiatives fail due to lack of buy in and commitment by team members. Cannon identified the following elements to build toward success:

- Change initiatives require the team to take the journey together through new behaviours that are consistently applied across the organization
- Change initiatives need to keep the strategy simple enough to support implementation, this means creating a line of sight between the innovation and the execution of the strategy
- Change initiatives should remove barriers and support enablers which drive the change forward including financial resources, performance metrics and incentives

Many organizations are experiencing forces and challenges which are driving change. This has a direct impact, as Cannon identifies, on employee engagement and alignment. Organizational change may contribute to considering a workplace transition. Significant changes may lead others in the organization to leave the organization as well. When you are experiencing significant change within your organization, you could take this opportunity to open up the conversation about change with your supervisor or others in the organization.

As an employee, we may understand the pressure on the organization, but we might not always agree with the decisions made by senior management. This will affect the transition process. It is important to consider your emotions and feelings throughout the transition, especially when you are directly impacted by negative forces. If you feel comfortable, change and transitions might be an opportunity to step into leadership.

Review & Clarify Your Organization's Transition Policies and Supports

Make time to review and familiarize yourself with your organization's specific transition policies and any supports that are available to support your transition. Make note of any specific requirements and/or relevant timelines. You may also want to familiarize yourself with employer/employee legal requirements and/or the process of applying for employment benefits and/or accessing government career transition funding programs if relevant.

Considering Employment Options

Most of us experience the pre-transition phase as a simple and often quick thought exercise. We might spend a couple of minutes or maybe an hour considering our current employment state. Many of us will also take this time to update our resume in preparation for our transition. But we then quickly move on to look at potential employment opportunities.

My advice is to slow down and spend time in the pre-transition phase reflecting on what excites and frustrates you about your current role and what skills and knowledge would you like to further develop and/or utilize. Also consider the organization you are working for and their circumstances. Have the conditions within the organization shifted, and what are the implications for you in your current role?

The organization may initiate a conversation about remaining with the organization. In your pre-transition plan, you should consider this scenario. What would it take to remain with the organization? What promises are made to the organization you are joining, if you have already accepted a new role? If you decide to stay, what agreements might be negotiated in your current or future role with the organization?

The following sections of the pre-transition process include a guided approach to reflecting, both personally and professionally on your role. Pre-transition planning is also about addressing self-care, consulting trusted allies, and building your initial transition plan. Take the time to document your responses to the questions posed in these four sections. Your responses will guide you in your transition path.

Reflection Questions | Your Current Role

This first set of questions provide an opportunity for you to reflect on your current employment. Use these questions to identify those things that excite you and motivate you about your current role. Also take the time to reflect on why you might consider a transition opportunity.

These are big questions. You may want to start a journal and reflect on a daily or weekly basis on what felt good about the last week? What work experiences gave or took away your energy? Breaking down your experiences and reflecting on them in a bite size way may help you to navigate these questions.

- What excites me about the role that I currently have?
- What specifically have I accomplished in my current role? (note your key contributions)
- What accomplishments made me feel proud and/or were recognized by my peers or others?

- What challenges am I facing in my current role?
- What skills and knowledge would I like to better utilize or develop?
- What changes or shifts am I noticing in the organization?
- What signals do these shifts have for me and my role within the organization?
- What would I need to stay with this organization?
- What do I need if I decide to leave?

Finances and Transition Planning

Financial planning is important in both the pre-transition and transition process. You should consider your current financial position, your ability to navigate the change with or without a salary. You should also discuss the impact of a transition decision on you, your partner and family circumstances. In some cases, people choose to stay with an organization because they do not have the financial resources to make a work transition.

There may be circumstances in your transition process where your current or future employer might extend some or all benefits during a transition period. You should check your current employment contract and human resource policies. You could also consider asking a potential new employer to waive the benefits enrolment period.

Self Care | Fear and Agency

Transitions are deeply human processes. They require us to acknowledge and explore how our egos are impacted. The transition process often calls for us to act with both courage and empathy. This section helps you to consider your fears and hopes about the transition process. You are also encouraged to consider your motivations and your agency, the opportunity you have to be proactive throughout the process.

Be guided by these two questions throughout your transition journey:

- What is making me feel powerful and have ownership in the transition process?
- What is making me feel powerless about the transition process?

Building agency is about the actions you take to gain control and power over your current employment or future possibilities. Four questions guide this reflections. Having a greater understanding of your personal agency can help you address your fears and develop proactive strategies.

- What fears do I have about my current role?
- What fears do I have about a different future? In a new organization? In a new role?
- What agency or opportunities do I have in my current role to do something different?
- What agency or opportunities am I seeking in future roles?

Consider what you need for self-care. During times of transition, it is important to consider and take care of your physical, mental, emotional and spiritual self. If your organization provides resources for coaching or counselling, you might want to consider this option. Build in reflection and reach out to trusted colleagues and allies to support you mentally and emotionally through the pre-transition phase.

Consulting Trusted Allies

Trusted allies – both inside and outside your organization – are a great resource to your transition process. A trusted ally is someone who: knows you, understands your strengths, challenges and potential “blind spots”. Trusted allies do not shy away from sharing their perspective in an honest and empathic way and can be relied on to honour your confidentiality. Invite them to provide you with honest advice, noting what is surprising and what you find difficult to hear. Ask questions to clarify anything you don’t understand. Be prepared to consider the advice you’ve received as you thoughtfully plan your next steps.

Some of you may only have a small group of colleagues or friends who could be considered trusted allies. If your group is small, consider asking them for recommendations of others you might connect with and if they would be willing to make an introduction.

The questions below offer a starting point to guide your conversations with trusted allies:

- Who should I speak to about my current role? Inside my organization, outside my organization?
- Who should I speak to about my career experiences?
- Who are my trusted allies?
- What specific advice am I seeking?
- What questions should I ask them?

An interesting question to ask trusted allies was recently shared by Phil Roberts on Medium. [What would you do if you were in my position right now?](#) This type of question deepens the engagement of trusted allies in your pre-transition planning process. Your trusted ally may need some time to reflect on this question or may not be able to answer this question for you. If this is the case, trust your own instinct.

It is important to build a community to support you through all phases of the transition process. You are making a significant change and the trusted allies can be instrumental in helping you focus and consider possibilities that you might not have considered. Trusted allies or circles of support can be invited to share questions they might want you to consider. Their questions might illuminate some of your blind spots or the unknown future. Trusted allies can also be a powerful source of referrals and can help you to broaden your professional network and/or establish connections to investigate potential new pathways for yourself.

Remember to acknowledge their advice and stay connected with them throughout your transition journey. Your trusted allies will be much more willing to support you in the future if you engage in the conversations as an opportunity to build and deepen your relationships.

Building Your Personal Transition Plan

Building a personal transition plan is an exercise in reflection and action. The table below brings together the core elements of your pre-transition reflection process. The table assumes that you are engaging in a transition process. In some cases, the first three sections might lead you to consider remaining with your current organization and in your current role, albeit with greater clarity and focus.

In other cases, you might decide to proactively consider a transition, either within your organization or to a new one. Use this opportunity to both build a transition plan and to also reflect again on your hopes, fears, future goals, and potential agreements or boundaries. This reflection will contribute to your personal agency or control over your future.

Questions	Advice from trusted allies	My personal reflections
Hopes: What are the hopes I have for the transition that I am planning?		
Fears: What fears do I have? For myself? For my current colleagues? For the organization?		
Goals: What goals am I setting? For myself? For my organization?		
Agreements: What agreements am I seeking? For myself? For the organization I am leaving?		

My Next Steps

The final part of the pre-transition process is focused on making a decision about your next steps and planning a path forward. Have you decided to:

- Continue in your current role if the organization with a renewed purpose
- Transition to a new role within your current organization
- Accept a position in another organization
- Move towards a planned transition (such as parental leave or retirement)
- Pursue self-employment

Write down your next steps and the path forward you are planning. Later in this document are resources to help you build a future plan.

The next three sections of this resource detail activities to support you through different transition processes. The next section focuses on a Three Month (90 day) leadership transition process. The book, **The first 90 days** by Michael Watkins, provides advice to leaders to navigate their on-boarding process. This resource looks at the final three months (90 days) before your workplace transition and how to create a successful and meaningful transition for you, your organization, and your future.

As mentioned earlier, each transition is unique. Feel free to skim through this entire resource and review the sections that are most relevant to your transition process. The resource is adaptable to different transition journeys.

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.

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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](#)