A Guide To:

By: Liz Weaver

The Human Side of Workplace Transitions

Navigating this Resource

1

This section explores the many 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.

2

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.

3

This section outlines the value of a structured 90-day transition process, particularly for senior leadership roles. A three-month period strikes a balance—long enough to provide thoughtful reflection and leave behind key documents for organizational continuity, but not so long that it invites unnecessary delays or added tasks. While pre- and post-transition planning remain essential for personal reflection and emotional navigation, the 90-day framework offers a practical timeline to manage organizational needs while supporting a smoother changeover.

4

This section introduces the three-week transition process, a shorter but structured approach that mirrors the 90-day model in condensed form. It is most relevant for employees outside of management roles or for situations where organizations require a quicker departure. Despite the shorter timeline, it still empowers individuals to actively shape and manage their transition. For even shorter timeframes, the guidance can be customized by focusing on the most essential elements to ensure both personal and organizational needs are met.

5

Not all transition processes are led by the employee. In some cases, the organization initiates the termination of employment. Navigating the termination of employment process is filled with emotions but also requires proactive thought and action by you. Termination can be a particularly emotional time. This section provides helpful advice, reflection questions, exercises and practical steps to navigate a termination process.

6

This section highlights the value of post-transition reflection to carry forward learning, recognize achievements, and prioritize self-care. By focusing on what feels within your control, you can make the experience empowering and positive for both you and your organization. Since every transition is unique, the tools and questions provided can be adapted to support your journey and help you “leave well.”

Overview

A workplace transition is any significant change in your employment status. There are many different types of workplace transitions, including starting a job, being promoted, being terminated, taking a sabbatical or other leave and retirement. Workplace transitions are also major changes that you experience from new supervisors or significant or organizational changes. This resource is designed to support you, the person navigating a workplace transition, to be successful throughout the transition process. The resource provides practical steps to navigate your workplace transition. It will also help you understand and walk through the many emotions connected to transition processes.

Workplaces are in a time of change and upheaval. Most of us want to engage in a positive transition process, but often experience the opposite. The goal is to navigate the transition positively, identifying your contributions, and building a plan to move forward. This guide is designed to help you plan well for your next workplace transition.

We welcome you on the journey.

Workplace Transitions are more frequent than you think.

Workplace transitions occur more often than we imagine. According to the Michael Watkins, author, The first 90 days, leaders in organizations will experience many transitions throughout their career. Some of these transitions will be internal promotions or the pursuit of external opportunities which are often positive and lead to career growth. Other types of transitions such as being downsized or terminated are viewed as negative. All transitions, those that are positive (a new job promotion) and those that are negative (being downsized or terminated) can be challenging and full of a range of emotions. This resource is designed to amplify positive transitions and turn negative experiences into positive ones.

Watkins, in a video about the first 90 days and workplace transitions, identifies that an average leader over 18 years of workplace experiences will navigate the following transitions:

- Be promoted 4 times
- Join a new company 3 – 5 times
- Move between business functions 2 times,
- Move between business units in the same company at least twice
- Move geographically an average of more than 2 times

This data shows at least 13.5 major transitions experienced by organizational leaders. Workplace transitions also applies to many types of employees.

Most individuals experience a significant work transition every 1.5 years, whether directly or indirectly when the organization or leadership has changed.

Consider your company or organization:
How many leadership transitions has your organization experienced in the past two years? How many of these transition impacted you and your work? How many work-related transitions did you lead?

Workplace environments are shifting. Many countries are experiencing both an aging and changing workforce. The number of people transitioning into retirement is growing according to recent data from Statistics Canada. More than 1 in 5 (21.8%) people are aged 55 to 64 and considering retirement options. The latest data shows that life expectancy in Canada at birth is now 81.7 years. If you retire at 65, you will have at least 16 years to plan and navigate retirement.

"...every job on Earth ...is the result of a highly personalized equation, an arithmetic of wants plus needs plus hopes plus dreams subtracted from realities. Variables include location, desperation, hours, benefits, coworkers, conditions, difficulty, security, and autonomy. The calculations happen unconsciously or not, under duress or not."

Stuck. Why we can't (or won't) Move On - by Anneli Rufus.

In addition, there are now up to five generations in the workplace environment. Each generational cohort has different values, perspective, employment priorities and life demands. Workplace transition planning has different implications for a multi-generational work environment. Organizations navigating internal transitions should consider the diverse needs and wants of their team members.

During a transition phase, you might review your organization's benefit plans to see if there are resources to support you. As well, you might seek out a coach or confidante to support you and bring relevant information and experience.

During 15 years with Tamarack Institute, more than 40 staff joined or left the organization. For many, these transitions were positive, the individuals were growing in their careers and leaving for new roles. For others, the transitions occurred for a variety of reasons including funding changes or the remote work at Tamarack. Work transitions are the reality.

My Workplace Transition Experience

Work transitions are the reality. They are more frequent than we imagine. I have personal experience with navigating transitions. Prior to joining Tamarack, I moved through three executive roles over a seven year period. These changes were career growth opportunities.

As an employee at the Tamarack Institute, over 15 years, I experienced multiple work transitions. I initially connected with Tamarack as an affiliated partner and then was recruited as employee. I experienced opportunities to move up in the organization four times, moving into a senior leadership role as Vice President and then Co-CEO. I also navigated the transitions of core leadership team members including the departure of the organization's founder and Co-CEO, and the on-boarding of a new Co-CEO partner.

During my time as Co-CEO, I experienced several board of directors leadership changes and was engaged in several strategic planning processes. All of these transitions impacted my personal leadership priorities and those of the organization.

My final leadership transition was moving away from the role of Co-CEO into retirement or my post-career phase. Planning for retirement is a transition we often ignore, but it is full of human emotions and requires us to be mindful and plan. I prepared for the transition from organizational leadership to retirement over a two year period. The first 12 months, I thought deeply about my role and contributions. I recognized that the organization was shifting and changing.

I began to prepare myself for this next phase of my life. I started to focus on personal priorities which would ease the transition from work to retirement. These included initiating a walking program and new activities including travel and painting. All of these activities gave me time to reflect on my work but also opened me up to considering what else I might want to do.

Framing this Resource & Key Ideas

This resource has been developed to help those of you experiencing a workplace transition. It reflects employment transitions that I have experienced, both good and challenging, and the lessons that I have learned along the way. The resource was written with the nonprofit sector experience as a reference but can be adapted to other sectors. It also reflects conversations I have had with colleagues across the non-profit, government, and private sectors. I have benefited from their thoughtful wisdom, direction, and their honest reflections about their own journeys.

Transitions are emotional. This document invites you to reflect on the emotions you are experiencing during a work transition. I do not have a degree in psychology or social work, but I have navigated situations where my emotions were real and raw. Taking the space to reflect, to consider how these emotions impact decisions, relationships, and choices, often led to better outcomes for me and for others. Many of the offboarding resources that can be found online emphasize the importance of connecting to and reflecting on your emotions but don't provide reflection questions or tools.

This document is centered around the following six key ideas.

1. **Each transition is unique:** Every transition journey is unique but reflective processes can make the experience a positive one
2. **You have agency:** You have a powerful and important role to play in your work life transitions
3. **Navigating your emotions**: Understanding and navigating your emotions will contribute to your sense of agency and opportunity
4. **The need for planning:** Most transitions are initiated with the best of intentions, but fail due to a lack of process and planning
5. **The transition journey:** There are reflection and self-care practices in this resources that can support a successful transition pre, during and post transitions
6. **You are not alone:** Engage trusted colleagues and allies throughout the transition journey

Navigating this Resource

Understanding the transition process and building a plan is one of the best strategies to successfully navigate work place transitions. It is a skill we all need. In conversations with individuals who have recently changed roles in their organizations or moved on to new opportunities, I heard stories of success and challenge.

Transitions are both a technical and intensely personal process. Integrating self-care, managing your emotions and those of others, are core capacities to effectively navigate transitions.. Leaving well is the goal.

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, but few that focus on engaging and supporting individuals moving through the transition process. A reflective and planned transition process will help you navigate the ups and downs of departing an organization and facing forward.

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

The transition planning approach in this resource is divided into six sections:

Section 1: All about Work Transitions
Section 2: Pre-Transition Reflection and Planning
Section 3: The Three Month (90 day) Transition Process
Section 4: The Three Week (21 day) Transition Process
Section 5: Termination and Transition
Section 6: What's Next: Post Transition Reflection and Planning

Each of the sections will follow a similar format and provide advice for you to consider as you plan for your transition. I recognize that each transition experience is unique. This resource is designed in a 'choose your own adventure' approach. Feel free to pick, choose, and adapt content to suit your needs and experience. At the end of the document, you will also find a variety of links to transition resources.

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

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- Building your transition plan

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- Self-care and agency
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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.

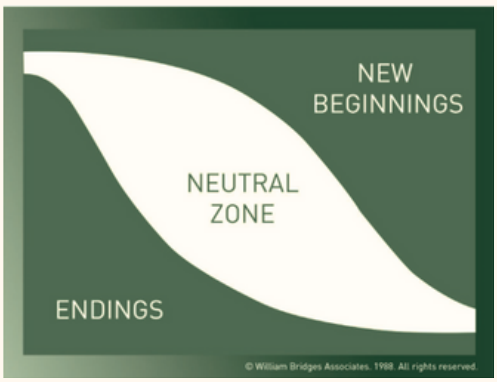
The Bridges Transition Model is a useful way for framing for the employment transitions.

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:

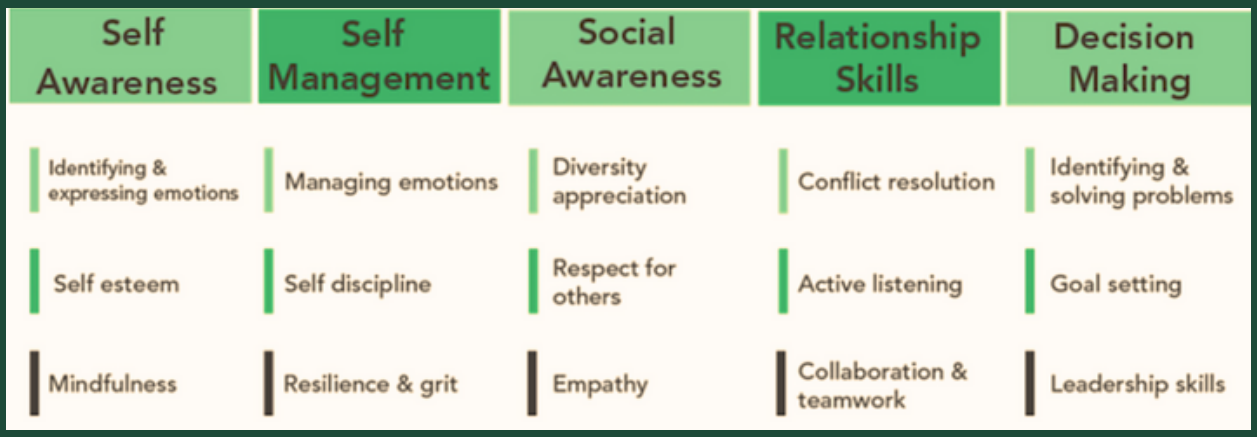
- Often feel misunderstood
- Get upset easily
- Become overwhelmed by emotions
- Have problems being assertive

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.



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 ais 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.

SECTION 2

Pre-Transition Reflection & Planning

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 waiver 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.

SECTION 3

The 3 Month (90 day) Transition Process

The Three Month (90 day) Transition Process

The 90 day transition process provides leaders with the time to be fully reflective and provides the organization with key documents which are designed to support future leaders and continue to advance the work.

Senior-level executive positions (CEOs, Vice Presidents, Directors) often have a longer off ramp or transition process. The 90 day transition process is aimed at these senior-level positions. When I retired from Tamarack, I negotiated an 11 month transition with the board of directors. My reflections, once I had completed my transition period that an 11 month transition was too long. I did not feel rushed at the beginning and began to take on additional tasks. This led to a squeeze at the end when I had to finish some core tasks quickly and still navigate the transition process for myself and the organization.

A three month (90 day) transition process is a reasonable length of time to navigate the change. The 90 days is focused on the organizational transition process and does not include the individual's pre-transition and post transition planning. Pre- and post transition planning are important steps which can enhance your transition journey, give you reflective space and the time to navigate the emotions of transitions.

Resignation or Transition Letter

The resignation or transition letter is a tangible internal and external signal of change. Once a letter of resignation has been submitted to the organization or you have accepted a new role, the transition process effectively begins. Engage in a conversation with your supervisor when you present your resignation letter. This is the opportunity to share your resignation plans, articulate your hopes for the transition process and the role you would like to play. It is also an opportunity to clarify and confirm the organization's expectations and commitments during the transition process.

In some situations, your resignation could be a surprise to your supervisor. Give them time to process the resignation letter and ask questions. There could also be times when your supervisor (or board member) is not happy with your news. They know that replacing you will take time and resources. They may even feel betrayed or hurt. You may have been the face of the organization and they will be worried about relationships with employees, clients, funders or external partners.

Your resignation letter should signal a rationale, if appropriate, and indicate your hope for a positive transition process. It is important to leave an organization in a positive way. The letter might also include proposed transition dates and information about your future plans, if they can be shared.

There are lessons that I learned during the process of submitting my resignation letter at Tamarack. Even though I had shared my intentions during performance interviews, the board of directors leadership had changed.

In leadership roles, it is good practice to have an annual and frank conversation about succession and succession planning. This process is healthy for both the individual and for the organization. This conversation provides both parties with an opportunity to reflect on their commitment, relationship and future plans.

I was also not proactive in negotiating the formal announcement but did contribute to developing a transition plan. In many ways, my experience, and the experience of others who have contributed to this resource, has shifted my thinking about the importance of being thoughtful and proactive during the transition process.

You and the organization may have different priorities that might conflict during the transition process and developing a transition plan can help to manage or mitigate the conflicts which might arise. Remember to schedule regular check ins with your supervisor or human resources to ensure that the co-designed and shared transition plan is moving forward successfully. There may be times where the transition plan will require clarification and adjustments.

The Formal Announcement

The formal announcements both within and external to the organization are pivotal points in the transition process. In many cases, you can ask to have input and a role in the public announcement and key messaging around your transition. Often there is a conversation about timing of the resignation or role shift and it is usually at this point that you can ask questions about the public announcement and what contributions you might make to the public announcement.

Consider how the public announcement will be shared and with whom. The public announcement will likely recognize your contributions and may inform members about the transition process. Some organizations may want to wait to share a formal announcement until a new person is hired. While the timing and content of the formal announcement is determined by the organization, if you have done pre-transition planning, you might be able to share what you consider as significant about your role or the contributions to the organization.

Another issue to consider if you are moving to another organization, is to align the announcements. You don't want the new employer announcing your hiring until your current employer does - it would be terrible for your colleagues to read about your new job before they know you are planning to leave. Also, the date of the transition is important.

People will want to reach out to you so setting dates, referring them to your LinkedIn profile to contact you may be a consideration as many people may only know how to reach you through your current email.

Human Resources & Finance Departments

Once you have shared your resignation letter with your supervisor, you might be referred to human resources and the finance departments within your organization. These departments may play a role in formally accepting the resignation and supporting you through the transition process.Some organizations will have a formal off-boarding or transition protocol, while others will have an informal process.

If your organization does not have an off-boarding protocol, there are online resources which can be accessed to develop and building a shared transition plan. You might want to share this list with your organization to support their off-boarding process.

The following items are typical examples of off-boarding checklists

- Agreement around last date of employment
- Agreement around process for accrued vacation or lieu days
- Notification of last date for accessing any work benefits programs
- Completion of termination paperwork
- Communication of the exit both internally and externally
- Completion of a handover document
- Collection of company assets
    - May include laptop and other computer equipment, phone, ID/Access Card, uniform, company credit card, company vehicle, other assets
- Information to employee about uploading or deleting computer files and programs (particularly useful for remote employees)
- Deletion of access to software programs
- Arrangement of final payments and benefits
- Completion of the exit interview
- Process for gratitude and acknowledgement of the departing employee
- Collection of updated contact information for the employee
- Process to check in with remaining team members
- Initiation of a recruitment process
- Updating internal documents including the organizational chart,
- ·Updating external documents including organizational website and other online documents

Weave into the three month (90 day) transition process any pre-transition planning and reflections which might be useful in your initial conversation with the Human Resources or Finance Department.

Agreement on building a transition plan

The final step in the announcement phase is to secure agreement on jointly building a transition plan. This shared agreement approach is helpful to individuals who are navigating the next three months (90 days). A solid transition plan can also be helpful to the organization. The organization will be able to articulate their needs and desires to help both parties ensure an effective and successful transition. The following sections support the building of shared transition plan.

Your Personal Transition Plan

Review your pre-transition reflection notes prior to completing the table below. Consider what you learned through the resignation and announcement process. Spend time completing the table below on your own.This exercise will be useful when you work with your organization to build a shared transition plan. In some cases, you may feel comfortable sharing all or parts of your personal transition plan document with your organization or your supervisor.

Questions	For myself	For the Organization
Hopes: What hopes do 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.		

Self Care – What will you need to navigate this transition time

Transitions can be exciting and scary at the same time. It is also important to build in the practice of self care into your transition process.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state and frame of mind.

The public announcement of your transition may generate an outpouring of good wishes and reflections from colleagues. Be sure to take time to reflect on, accept and celebrate this recognition for yourself and make time to acknowledge these good wishes from senders.

Acknowledging and being proactive about your emotions – both joyful and challenging – during the transition period is a way of building resilience and greater capacity to navigate the challenges ahead. This might be a time to connect back with trusted allies or to access external supports.

During transitions we experience mixed emotions including grief and loss but also hope and excitement.The pendulum between these emotions will swing frequently and focusing on self-care creates awareness and a sense of balance. For each month during the next three months (90 days), you will be prompted to capture your emotions and consider the following questions.

- What do you need personally to navigate this transition time?
- What impact will this transition have on personal and work relationships?
- Who should be included in conversations about your transition?
- What coaching or other resources or supports can you access through the transition process?
- How do you build in reflection time?
- How will you navigate the grief of leaving and the hope of new beginnings?
- What else do you need to consider to build a practice of self care?

Today, I am feeling the following emotions about my transition process.	
This is what I will do to act on these feelings and emotions.	

Organization expectations and transition planning

The next step in the first month (30 days) is to build a shared transition agreement between you and the organization. This transition agreement should include the following items:

- The hopes and fears expressed by each partner about the transition process
- The boundaries including time available to focus on the transition and time required to complete outstanding work
- A defined strategy for communicating the transition (internally and externally), transferring work and related experiences (including memberships on volunteer committees, etc.) and contact information from you to the organization
- Identified steps and check in points with key organization team members designed to keep the transition plan on track
- Any additional items that you and the organization agree are essential to ensure a successful transition

The table in the previous section can be used to build the framework of the shared transition plan.

Sharing the plan with the team & getting feedback

Once the transition plan has been developed and has the agreement of both parties, it might be useful to share the transition plan with other team members. Sharing the plan has benefits. Team members will know more about the transition process and what they might expect out of this process. Team members might identify gaps in the planning process. Team members might provide support and engage with their colleague through the transition process.

Sharing the plan may not work for every organization or work team. However, an open and transparent transition plan can contribute to team engagement and address some of the hopes and fears of team members as they prepare to lose a team member.

Building the transition agreement – organization and you

In addition to developing a personal transition plan, your supervisor or the organization could be invited to develop their version of a transition plan. In this version, the organization should consider the impact of the transition on the team and on the organization as a whole. In addition, they could be invited to consider how the will or can support the individuals who is leaving or taking on a new role within the organization.

Completing the table below will help the organization consider many of the aspects of the transition process.

Questions	**For the Organization**	**For the team member leaving**
Hopes: What are our hopes for the transition process?		
Fears: What fears does the organization have for the transition process? How will the team be impacted?		
Goals: What goals should be set by the organizations to manage this transition?		
Agreements: What agreements are non-negotiable? What agreements are negotiable?	· Confirm final date of employment · Agreement on vacation or lieu time accrued – how to manage this process · Document current work · Agree upon deadlines · Confirm internal meeting and team participation · Agree to an off-boarding process – Organization-led · Develop transition notes for replacement (if required)	· Confirm final date of employment · Agreement on vacation or lieu time accrued – how to manage this process · Document current work · Agree upon deadlines · Confirm internal meeting and team participation · Agree to an off-boarding process – Organization-led · Develop transition notes for replacement (if required)

Reporting and relationships

The second month of the off-boarding, transition process will likely focus on documenting and transferring information. Depending on your length of time at the organization or in your current role, this process may take some time. How information is transferred should be included in the transition plan. Many organizations have a shared, online filing system which can accelerate the file transfer. However, you may want to review your files and ensure that private and personal information is deleted from the system.

Self Care – What will you need to navigate this transition time?

The excitement of announcing your transition has now passed. It is still important to check in with yourself and understand how you are feeling as you start your second 30 days.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state. For each month during the 90 days, capture your emotions and consider the following questions.

Today, I am feeling the following emotions about my transition process.	
This is what I will do to act on these feelings and emotions.	

Follow up questions

- How have your emotions shifted?
- Who can you turn to for advice and support?
- What are you looking forward to as you progress through this stage of the transition?
- What are your fears?
- What strategies do you need to put into place to manage your fears?

Based on these reflections, it is useful to revisit and update your personal planning document.

Documenting current work – contacts, status, resources, internal transfer recommendations

Leaving the organization well should be the goal. This often means documenting current work in a way that can be used by colleagues to continue to advance projects and support organizational partners. There is a commitment to the organization and to partners that should be maintained.

Even if the transition that has negative impacts, downsizing and/or shifting priorities in the organization, there should still be a priority on leaving positively. This will help to maintain personal and work connections, ensure the sustainability of the work and the partners, and continue to support the organization post transition.

Items to include in documenting current work:

Assigned Work Projects

- Description, key partners, email or other contact information, current status as of (date), recommended next steps including who on the team might be able to maintain or complete the work project
- Agreed deadlines for completing projects or for the document of current work report

Anticipated Work Projects

- Description, key partners, email or other contact information, current status and information about timing and steps to advance the anticipated work project – this includes outstanding funding proposals, agreed services which have been scheduled, future meetings and partnerships in the early stage of development

External and internal committee support and leadership

- Description of the current status of the committee work, your contributions to the committee, recommendations for next steps

Personal Reflections about the Position and Organizations

- In preparation for the exit interview, take the time to consider and write down your personal reflections about the position and organization including positive opportunities encountered and challenges connected to the work

On-boarding document or package for replacement

- Include:work-related transition files, key contacts, and any recommendations which might support the replacement during their onboarding process
- Your role or potential in supporting or onboarding the person hired to replace you on the team (if a replacement is identified)

Internal team meetings – how and when to engage, when to step back

Agreement about participating in internal and team meeting should be part of the transition plan. The organization is immersed in planning for the departure including reviewing the position opening and planning forward. There may be opportunities to continue to engage in internal team meetings, but given the shifting priorities, there may also be opportunities to step back.

This is the time when transitions and all the emotions get real. You are no longer privy to decisions being made by the organization and you may note that they don't care as much about your files as you do. Especially if there is a new leader coming on who wants to do things their way. The second month is a pivot point for both you and the organization.It is full of emotions and later in this section, you will have the opportunity to reflect further on how your emotions are impacting you.

Stepping back will mean more intentional time to complete outstanding work projects and to document current work. It also begins the process of shifting focus toward the transition process. It can be complicated when you participate in workplace planning conversations. Your expertise might help to inform the conversation, but you will not be around for the execution of the plan. Speaking with your supervisor, human resources or your team in advance about your role in planning conversations is useful and can set appropriate boundaries.

The second month (30 days) is a natural time to step back from internal team meetings where you are not the leader.The conversation around engagement is important and should be considered based on personal preference, availability and contribution to team and organization.

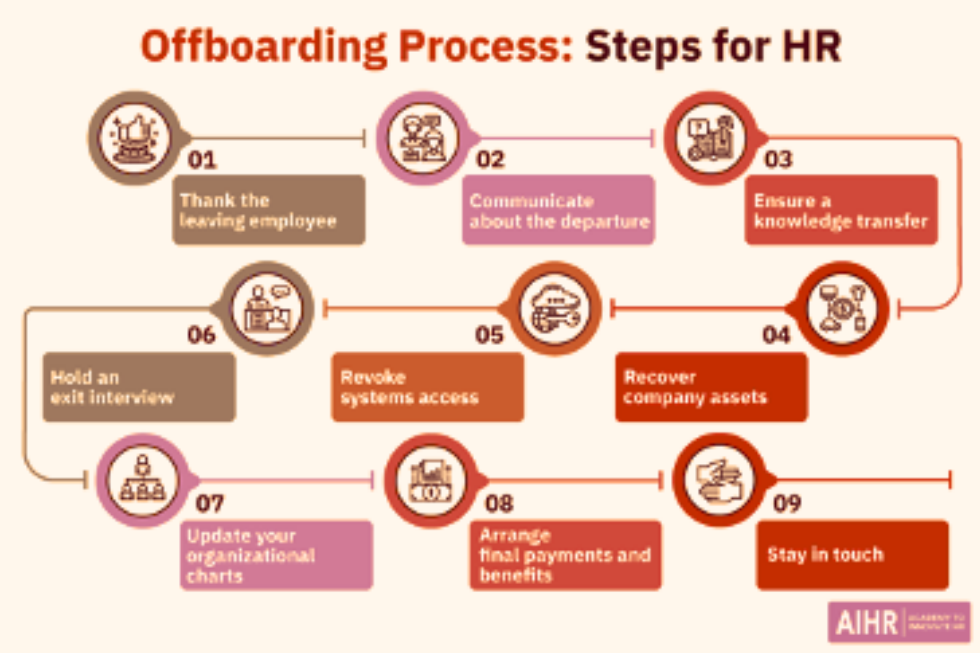
Developing/completing the off-boarding document for the organization

There are several examples of off-boarding or transition check lists which can be accessed online.Most off-boarding checklists have been developed to support the human resources department in the organization.All organizations should have an off-boarding document in place to ensure that both the individual experiencing the transition and the organization are able to manage the process effectively.

The Academy to Innovate HR provides a useful offboarding process for human resource managers. It contains nine steps for organizations to consider in the offboarding process. The AiHR suggest that the offboarding process completes the employee lifecycle and provides support to the employee to leave the organization in a structured, positive, and coordinated way.

AiHR identifies that a strong offboarding approach matters and can lead to the following outcomes:

- Former employees can be ambassadors for the organization
- Former employees can become future employees
- Former employees are or can become customers or partners of the organization
- A strong offboarding process and maintain connections and organizational knowledge
- A strong offboarding process can enhance organizational security and minimize future threats, especially through a strong technology transfer process
- A strong offboarding process may be needed for compliance and regulatory requirements for certain industries



https://www.aihr.com/blog/offboarding-checklist/

Technology and offboarding

An increasingly important step in the offboarding process is uncoupling from the organization's technology that you have used to advance your work. Technology hardware and software is particularly challenging during a transition process. An information sheet and process for the employee about technology, uploading and deleting files to a shared information system, and deleting access to shared programs including finance and human resources programs is essential. This information sheet will ensure a more seamless transition.

An off-boarding checklist was provided. Review this checklist to make sure that you and the organization are making progress on the offboarding process.

Given the number of transition experienced by organizations, a transition checklist is an important and essential tool. A transparent offboarding process is an essential tool for both the organization and the employee.

Internal meetings to navigate the transition process

During this second month or 30 days of the transition process, several meetings should be organized and scheduled.

- Monthly meetings with your supervisor or human resources to review and revise your 90 day (3 month) off-boarding plan
- Meeting with your supervisor or human resource to review the off-boarding checklist
- Scheduling the exit interview with your supervisor or human resources
- Meeting with Supervisor and/or human resources to share and confirm work-related transition documents and files
- Meeting to confirm final transition requirements

Ensure that key meetings are on the calendar is an important part of the transition process. Your supervisor or the organization may already be moving forward and may not focus on these meetings. Be proactive. These key meetings will contribute to a smooth and mutually rewarding transition journey.

Self care – preparing for the final steps in the transition, letting go, and facing forward

This is a month of mixed emotions. Even though there is excitement about the next step, there might also be sadness about leaving an organization where you have made contributions and alliances. Again, it is important to consider your emotions and to build in self-care strategies as you transition through this final 30 days.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state. For each month during the 90 days, capture your emotions and consider the following questions.

Today, I am feeling the following emotions about my transition	
This is what I will do to act on these feelings and emotions.	

Follow up Questions

- How have your emotions shifted?
- Who can you turn to for advice and support?
- What are you looking forward to as you progress through this stage of the transition?
- What are your fears?
- What strategies can you put into place to manage your fears?

Prepping for and participating in the exit interview

Many organizations have formal exit interview processes. The exit interview provides the organization an opportunity to understand the reason for departure. An exit interview process does not have to be solely owned by the organization. You can use the exit interview process as an opportunity to reflect on and share your successes, employment highlights, and contributions to the organization. This shared reflection process is useful for both parties. The exit interview process should also include a review of the transition plan and confirm final transition documents and processes.

Consider who is doing the exit interview and what they might do with the information you share with them. For example, is it someone in Human Resources or your supervisor? Be prepared for what you want to say. How critical do you want to be? A recommendation for the exit interview is to always stay positive and forward looking.

Indeed, a recruitment website, identified the following questions to be included in an exit interview process.

1. What prompted you to begin searching for another opportunity?
2. Do you feel your manager gave you what you needed to succeed?
3. What did you like best and least about your job?
4. How do you think your job has changed since you were hired?
5. Did you feel your achievements were recognized throughout your employment?
6. What suggestions do you have for the company? How could we improve?
7. Is there anything that you would have changed your mind about leaving?
8. Would you recommend this company to a friend? Why or why not?

The exit interview is an opportunity for a two-way conversation. The organization is seeking, through the exit interview process, to improve the employment and employee retention experience. It is also an opportunity for you to share perspectives and contributions that have been made to the organization. This reflection process will support you through any post transition opportunities.

Acknowledging contributions & celebration of your work

The final 30 days will be an opportunity to acknowledge contributions and celebrate with internal and external partners. Consider how these acknowledgements and celebrations might happen and who might be involved. Be proactive and reach out to colleagues to thank them for their partnership during your time with the organization. Acknowledge how they have helped you or contributed to your success.

If you are reaching out to external colleagues, let the organization know. The organization may also have a relationship with external partners and colleagues and this can deepen or strengthen the relationship.The message should be positive and supportive of the organization and the journey that you have been on together.

It is especially important to share who the external partner may contact once you are gone. It is helpful to have this is place. You may also want to discuss with your organization how you will share your personal contact information - in many cases that might just be a referral to your LinkedIn profile.

Connecting and thanking team members, key allies, contacts, collaborators, volunteers

Gratitude is the gift that you can give others. Our work requires us showing up as a whole person which includes our strengths, weaknesses, and emotions. Team members, allies, and collaborators have helped you be successful and have contributed to your employment journey.

The practice of gratitude also has benefits to you as well. For example, it offers colleagues an opportunity to share the impact you have had on them and reflect on the valuable work you have done together. This may offer you further insights and reflections about yourself and your accomplishments that you may not have considered.

Take the time to connect and thank individuals who have provided support while employed at the organization. Make a list of names and think about the specific contribution of each individual.Personalizing your gratitude will make it more meaningful and will provide you with an opportunity to deepen and strengthen the relationship and connection.

We often fail to acknowledge that our personal success is tied to the encouragement and support of others. Spending time considering who and how you are grateful, will be affirming and enriching.

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Here are some final steps to complete the 90-day (three months) transition and enable the ability to face forward.

Complete the transition plan: A completed transition plan will ensure that there are no obligations which keep you tied to the organization. This completed plan will also support the organization and your colleagues to move forward in an effective way. Make sure you hand your completed transition plan to either your supervisor or human resources in the organization and celebrate this accomplishment.

Revisit your hopes and expectations for the future: Over the past 90 days self care and reflection have been essential elements in the transition process. Revisit the hopes and expectation that you wrote down. How have these shifted and changed? What else might you add to this list? Where might you seek supports?

Engage in self care and reflection: The 90 day transition process has likely been a mix of reflection, planning, documentation and emotions. Fear and curiosity are two emotions that seem to be at the polar opposite sides of the journey. And yet, fear and curiosity can take us toward anticipation and the future. Take the time for self-care throughout this transition journey. For example, you might want to consider ways in which you might honour or recognize this transition for yourself in some meaningful way. You are not alone; there are colleagues in your network who are on similar journeys or trusted allies who will support you and be there for counsel and advice. In the course of writing this resource, I connected with over 20 colleagues who have shared their insights and comments to this document and invite their comments. In each conversation, they shared thoughts about their own transition journeys and the benefits that come from reflecting on and sharing them with others. In our circle are colleagues who recently completed a transition journey or are in process. These colleagues can be your confidants, supporters and cheerleaders.

SECTION 4

An Accelerated Three Week (21 day) Transition Plan

An Accelerated 3 Week (21 day) Transition Plan

The second type of transition explored in this resource is a three week transition process. Most organizations request at least two weeks notice, but this document provides a three-week plan which follows the pattern of the 90 day transition process. The shorter length of transition is often more applicable to employees who are not in a management stream or position. While the time frame is compacted, the process still provides individuals with an opportunity to own and manage their transition process.

The 3 week transition process is an accelerated approach for leaders and organizations. Many individuals and organizations often have a shorter timeframe to navigate the transition process and this section accommodates a shorter window.

There are cases where the timeframe for the transition process is even shorter than the three month or three week timeframes described in this resource. If your transition process is shorter, identify the elements in the transition process most relevant to you and focus on those. You can customize the approaches in this resource to accommodate your transition experience.

Not everyone will have the luxury of a three month (90 day (or longer)) off-boarding or transition process. Often, transition times are much shorter. Most employees are required to provide a minimum of two weeks notice to their organization when resigning a role. The time between the resignation and departure might be even shorter if the employee has accrued vacation days and/or lieu time. A shorter time frame requires a more focused approach to transition planning.Identify those elements which are most important to you during your transition process to focus your energy.

A shorter transition period can create risks to the organization if there is not sufficient time to transfer information and files. This can lead to broken relationships with partners and the inability of colleagues and team members to be updated and trained to effectively move projects forward.The organization should consider how to orient current staff and team members who are required to take on additional responsibilities post transition.

This section of the transition resource focuses on a shorter, three week transition timeline.It follows the same process as the three month (90 day) transition plan but recognizes that expected some deliverables will need to be adjusted or even deleted to accommodate the negotiated transition time frame.

We recommend that you visit section 1 in this resource and adapt the pre and post-transition planning into your process. Spending time considering your motivations, emotions, and managing the transition process is integral to a healthy and successful transition and offers you an opportunity to consider your own agency in addressing your needs and proactively shaping your future. Transitions from or within an organization provide a valuable opportunity for reflection and decision-making.

Week One – Announcement and Planning

Determine what can be accomplished over the next three weeks (21 days): The next three weeks (21 days including weekends) are a very compressed time for you and for the organization. One of the first actions is to consider what might be able to happen over the next three weeks (21 days). In some cases, the timeframe might be even shorter when vacation and other leave time is factored into the three-week schedule.

Even in a compacted schedule, build in time for personal reflection and planning to ensure the transition process is smooth. Key elements to consider in the transition process are the announcement, building a personal transition plan, taking care of yourself, having clarity about organizational expectations and commitments. Your expectations and the organization's expectations should form the basis of a shared transition agreement.

The first week is about announcing your departure, agreeing to transition expectations – yours and the organization's, and agreeing to a transition plan.

Announcement and Planning

Resignation or Transition Letter: Once a letter of resignation has been submitted to the organization or you have accepted a new role the transition process effectively begins. Engage in a conversation with your supervisor when you present your resignation letter. This is the opportunity to share your resignation plans, articulate your hopes for the transition process and the role you would like to play. In some situations, your resignation could be a surprise to your supervisor. Give them time to process the resignation letter and ask questions.

Your resignation or transition letter should signal a rationale, if appropriate, and indicate your hope for a positive process. It is important to leave an organization in a positive way. The letter might also include proposed transition dates and information about your future plans, if they can be shared.

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 were made to the new organization you are joining? If you decide to stay with your current organization, what agreements might be negotiated in your current or future role?

Consider your emotions during the transition process. Return to your pre-transition planning notes before making a final decision. Take the time necessary to make a decision which feels right for you.

The Formal Announcement

The formal announcement within or external to the organization is a pivotal point in the transition process. In many cases, you can ask to play a role in the public announcement and key messaging around your transition. Often there are conversations about timing of the resignation and potential role shifts during the transition process. You can ask questions about the public announcement and what contributions you might make to the public announcement. However, be prepared for playing a limited role in the formal announcement process, particularly during a shorter transition process. Consider how the public announcement will be shared and with whom. The public announcement might recognize your contributions. This is where your pre-transition planning effort could pay dividends.

Human Resources and Finance

Once you have shared your transition plans with your supervisor, you might be referred to human resources and the finance department within your organization. This department may play a role in formally accepting the resignation and supporting you through the transition process. Some organizations will have an off-boarding or transition protocol, while others will have an informal process.

If your organization does not have an off-boarding protocol, there are online resources which can be accessed to develop and building a shared transition plan. The following items are typical examples of off-boarding checklists. You might share this list with your organization if they do not have an off-boarding checklist.

- Agreement around last date of employment
- Agreement around process for accrued vacation or lieu days
- Notification of last date for accessing any work benefits programs
- Completion of termination paperwork
- Communication of the exit both internally and externally
- Completion of a handover document
- Collection of company assets
- May include laptop and other computer equipment, phone, ID/Access Card, uniform, company credit card, company vehicle, other assets
- Information to employee about uploading or deleting computer files and programs (particularly useful for remote employees)
- Deletion of access to software programs
- Arrangement of final payments and benefits
- Completion of the exit interview

- Process for gratitude and acknowledgement of the departing employee
- Collection of updated contact information for the employee
- Process to check in with remaining team members
- Initiation of a recruitment process
- Updating internal documents including the organizational chart,
- Updating external documents including organizational website and other online documents
- Again, your pre-transition planning and the reflections process are useful supports which can be used in negotiating and navigating the transition and offboarding process.

Agreement on Building a Transition Plan

The final step in the announcement phase is to secure agreement on jointly building a transition plan with the organization.This can be helpful to individuals who are navigating the next three weeks. A solid transition plan can also be helpful to the organization. The organization will be able to articulate their needs and desires to help both parties ensure an effective and successful transition. The following sections support the building of shared transition plan.

Your Personal Transition Plan

Review your pre-transition reflection notes prior to completing the table below. Consider what you learned through the resignation and announcement process.Spend time considering the parameters and boundaries around what you can do to support the transition and what you consider to be unreasonable or unrealistic. Complete the table below on your own. This exercise will be useful when you work with your organization to build a shared transition plan. In some cases, you may feel comfortable sharing all or parts of your personal transition plan document with your organization or your supervisor.

Questions	For myself	For the Organization
Hopes: What hopes do 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.		

Self care – What will you need to navigate this transition time

Transitions can be exciting and scary at the same time. They mark an ending and also signal an opportunity for a new beginning. Consider how you might want to honour and acknowledge this for yourself. It is also important to build in the practice of self care into your transition process.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state. Each of the next three weeks will be different but no less challenging. Capture your emotions at regular points during the next three weeks by considering the following questions.

Today, I am feeling the following emotions about my transition	
This is what I will do to act on these feelings and emotions.	

Follow-Up Questions

- What do you need personally to navigate this transition time?
- What impact will this transition have on personal and work relationships?
- Who should be included in conversations about your transition?
- What coaching or other resources or supports can you access through the transition process?
- How do you build in reflection time?
- How will you navigate the grief of leaving and the hope of new beginnings?
- What else do you need to build a practice of self care?

Building the transition agreement – organization and you

The next step during this three week process is to build a shared transition agreement between you and the organization. Again, a word of caution, given the short time frame, the organization may not have the resources to fully engage in this process.

If the organization is willing to build a transition plan, it should include the following items:

- The hopes and fears expressed by each partner about the transition process
- The boundaries including time available to focus on the transition and time required to complete outstanding work
- A defined strategy for transferring work, experience and contact information from you to the organization
- Identified steps and check in points with key organization team members designed to keep the transition plan on track
- Your role or potential in supporting or onboarding the person hired to replace you on the team (if a replacement is identified within your departure timeframe)
- Any additional items that you and the organization agree are essential to ensure a successful transition

Sharing the plan with the team

In the three week transition process, the organization will probably take the lead in sharing the transition plan with team members. Sharing the transition plan will support team members to know more about the transition process and what they might expect out of this process. Team members might identify gaps in the planning process. Team members might provide support and engage with their colleague through the transition process.

Sharing the plan may not work for every organization or work team. However, an open and transparent transition plan can contribute to team engagement and address some of the hopes and fears of team members as they prepare to lose a team member.

Organization expectations and transition planning

In addition to developing a personal transition plan, the organization could be invited to develop their version of a transition plan. In this version, the organization should consider the impact of the transition on the team and on the organization as a whole. In addition, they could be invited to consider how the will or can support the individuals who is leaving or taking on a new role within the organization.

Filling in the table below will help the organization consider many of the aspects of the transition process and identify elements which they would hopes and fears, boundaries, transfer tasks, steps to achieve plan, organizational supports (human resources, technology, etc.)

In the case of a shorter transition process, you may need to adjust your expectations around transition planning. In some cases, the organization may be navigating significant turnover of staff or experiencing a layoff process. Have a transparent conversation with your supervisor about what might be realistic around transition planning and the role of the organization.

Questions	For the Organization	For the team member leaving
Hopes: What hopes do we have for the transition process?		
Fears: What fears does the organization have for the transition process? How will the team be impacted?		
Goals: What goals should be set by the organizations to manage this transition?		
Agreements: What agreements are non-negotiable? What agreements might be negotiable?	· Final work date · Vacation or lieu time accrued · Document current work · Agreed upon deadlines · Internal meeting and team participation · Off-boarding process – Organization-led · Transition notes for replacement (if required)	· Final work date · Vacation or lieu time accrued · Document current work · Agreed upon deadlines · Internal meeting and team participation · Off-boarding process – Organization-led · Transition notes for replacement (if required)

Week Two – Documenting and transferring information Documenting and transferring information and relationships

The second week of the off-boarding, transition process should focus on documenting and transferring work information and files to key colleagues in the organization.Depending on your length of time at the organization or your current role, this process may take time. How information is transferred should be included in the transition plan. Many organizations have a shared, online filing system which can accelerate the file transfer. However, you may want to review your files and ensure that private and personal information is deleted from the system.

Self care – checking in with yourself, dealing with grief, building hope and optimism

The excitement of announcing your transition has now passed. It is still important to check in with yourself and understand how you are feeling as you start your second week of your transition process.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state. For each week during the transition, capture your emotions and consider the following questions.

Today, I am feeling the following emotions about my transition	
This is what I will do to act on these feelings and emotions.	

Follow up questions

- How have your emotions shifted?
- Who can you turn to for advice and support?
- What are you looking forward to as you progress through this stage of the transition?
- What are your fears?
- What strategies do you need to put into place to manage your fears?

Based on these reflections, it is useful to revisit and update your personal planning document.

Documenting Current Work – contacts, status, resources, internal transfer recommendations

Leaving the organization well should be the goal. This often means documenting current work in a way that can be used by colleagues to continue to advance projects and support organizational partners. There is a commitment to the organization and to partners that should be maintained. You will need to manage expectations, both yours and the organizations, about what might be accomplished during a shorter transition process.

Even if the transition is negative, as a result of an organizational downsizing and/or shifting priorities, your priority should still be to leave positively. Leaving positively will preserve your personal professional relationships with colleagues and partners, will contribute to your own sense of professionalism and integrity and will ensure that you will benefit from the opportunity for reflection and insights about both your transition and contributions. At the end of the day, it will also reflect well on you as an employee and future employee.

Items to potentially include in documenting current work:

Assigned Work Projects

- Description, key partners, email or other contact information, current status as of (date), recommended next steps including who on the team might be able to maintain or complete the work project
- Agreed deadlines for completing projects or for the document of current work report

Anticipated Work Projects

- Description, key partners, email or other contact information, current status and information about timing and steps to advance the anticipated work project – this includes outstanding funding proposals, agreed services which have been scheduled, future meetings and partnerships in the early stage of development

External and internal committee support and leadership

- Description of the current status of the committee work, your contributions to the committee, recommendations for next steps

Personal Reflections about the Position and Organizations

- In preparation for the exit interview, take the time to consider and write down your personal reflections about the position and organization including positive opportunities encountered and challenges connected to the work

On-boarding document or package for replacement

- Discuss and confirm the role you will play in on boarding a replacement (if this happens within your leaving time frame)
- Include:work-related transition files, key contacts, and any recommendations which might support the replacement during their onboarding process

Internal team meetings – how and when to engage, when to step back

In a three week transition process, because of the shorter time frame, you might consider negotiating with the organization to withdraw from meetings which are not significant to your role. Getting agreement about participating in internal and team meeting should be included in your transition plan.

The organization is immersed in planning for your departure. This could include reviewing the position opening and/or possibly hiring your replacement. There may be opportunities to continue to engage in internal team meetings, but given the shifting priorities, there may also be an opportunity to step back. This could offer you more intentional time to complete outstanding work projects and to document current work as well as provide more time for self-reflection and self-care. It also begins the process of shifting focus toward the transition process.

The conversation around engagement is important and should be considered based on personal preference, availability and contribution to team and organization.

Developing/completing the off-boarding document for the organization

There are several examples of off-boarding or transition check lists which can be accessed online.Most off-boarding checklists have been developed to support the human resources department in the organization.All organizations should have an off-boarding document in place to ensure that both the individual experiencing the transition and the organization are able to manage the process effectively.

Technology hardware and software is particularly challenging during a transition process. An information sheet for the employee about technology, uploading and deleting files to a shared information system, and deleting access to shared programs including finance and human resources programs is essential. This information sheet will ensure a more seamless transition.

Typical off-boarding checklists contain the following elements

- Completion of termination paperwork
- Communication of the exit both internally and externally
- Completion of a handover document
- Collection of company assets
    - May include laptop and other computer equipment, phone, ID/Access Card, uniform, company credit card, company vehicle, other assets
- Information to employee about uploading or deleting computer files and programs (particularly useful for remote employees)
- Deletion of access to software programs
- Arrangement of final payments and benefits
- Completion of the exit interview
- Process for gratitude and acknowledgement of the departing employee
- Collection of updated contact information for the employee
- Process to check in with remaining team members
- Initiation of a recruitment process
- Updating internal documents including the organizational chart,
- Updating external documents including organizational website and other online documents

Given the number of transitions experienced by organizations, a transition checklist is an important and essential tool. It should be shared with the employee to ensure both parties are aware of the organizational expectations and requirements.

Internal meetings to navigate the transition process

During this second week of the transition process, several meetings should be organized and scheduled.

- Weekly meetings with your supervisor or human resources to review and adjust the transition plan
- Meeting with your supervisor or human resources to review the off-boarding checklist
- Scheduling the exit interview with your supervisor or human resources
- Meeting with supervisor or human resources to share and confirm work-related transition documents and files
- Meeting to confirm final transition requirements

Ensuring that key meetings are on the calendar is an important part of the transition process.Your supervisor or the organization may already be moving forward and may not focus on ensuring these meetings occur. Be proactive. These key meetings will contribute to the transition journey.

Week Three – Celebrating, Ending, Gratitude, Facing Forward

The final week will likely focus on celebrating, formal endings, expressing gratitude and the process of facing forward. This is the time to both revisit and complete the transition plan. Reviewing and revising the transition plan may reveal elements to add to the transition plan or ones that no longer are relevant.

Self care – preparing for the final steps in the transition, letting go, and facing forward

This is a week of mixed emotions. Even though there is excitement about the next step, there might also be sadness about leaving an organization where you have made contributions and alliances.Again, it is important to consider your emotions as you transition through this final week with the organization.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state. Continue to capture your emotions and consider the following questions.

Today, I am feeling the following emotions about my transition process.	
This is what I think I need to care for myself right now	
This is what I will do to act on these feelings and emotions.	

Prepping for and participating in the exit interview

Many organizations have formal exit interview processes. The exit interview provides the organization an opportunity to understand the reason for departure. It also provides the individual with an opportunity to reflect on and share their contributions to the organization. This shared reflection process is useful for both parties. The exit interview process should also include a review of the transition plan and confirm final transition documents and processes.

Indeed, a recruitment website, identified the following questions to be included in an exit interview process.

1. What prompted you to begin searching for another opportunity?
2. Do you feel your manager gave you what you needed to succeed?
3. What did you like best and least about your job?
4. How do you think your job has changed since you were hired?
5. Did you feel your achievements were recognized throughout your employment?
6. What suggestions do you have for the company? How could we improve?
7. Is there anything that you would have changed your mind about leaving?
8. Would you recommend this company to a friend? Why or why not?

Acknowledging contributions and celebration of your work

The final week will be an opportunity to acknowledge contributions and celebrate with internal and external partners. Consider how these acknowledgements and celebrations might happen and who might be involved. Be proactive and reach out to colleagues to thank them for their partnership during your time with the organization. Acknowledge how they have helped you or contributed to your success.

If you are reaching out to external colleagues, let the organization know. The organization may also have a relationship with external partners and colleagues, and this can deepen or strengthen the relationship.The message should be positive and supportive of the organization and the journey that you have been on together.

Connecting and thanking team members, key allies, contacts, collaborators, volunteers

Gratitude is the gift that you can give others. Our work requires us showing up as a whole person which includes our strengths, weaknesses, and emotions. Team members, allies, and collaborators have helped you be successful and have contributed to your employment journey.

Gratitude is a reciprocal gift. Hearing from your colleagues and partners about the contributions you have made to the organization reinforces how you think about yourself and your role.

Take the time to connect and thank individuals who have provided support while employed at the organization. Make a list of names and think about the specific contribution of each individual.Personalizing your gratitude will make it more meaningful and will provide you with an opportunity to deepen and strengthen the relationship and connection.

We often fail to acknowledge that our personal success is tied to the encouragement and support of others. Spending time considering who and how you are grateful, will be affirming and enriching.

A short (three week) transition process may not allow time for acknowledgement and celebration.Some of the acknowledgement and gratitude might take place once you have left the workplace. Remember to acknowledge those who were important to you.

Technology and tools transfer

In most roles, employees have access to a range of technology tools. Organizations and employers will protect themselves by ending the access to technology hardware and software once you have completed their time with the organization. This is a risk management and confidentiality strategy for both the organization and the individual. However, uncoupling from software programs can be challenging.

During the final week, build a shared approach with the organization around technology transfer including the following:

- Confirm end date where you have access to technology – hardware and software
- Add work-related files to a shared or cloud-based platform
- Confirm to whom and how you transfer technology to the organization
- Establish a personal external contact email which you might want to share with colleagues and partners
- Change emails and passwords to work/personal organizations where appropriate – this might include travel services, work related newsletters that you want to continue to receive, etc.

Facing forward

While the week in the transition process is often spent reflecting and considering your contributions, it is also a time to begin to face forward. Some of you will have had a more negative transition process and felt alone and isolated. Others are looking forward to their new role in another organization, retirement or a sabbatical. In all cases, facing forward and turning toward the new is essential.

Here are some final steps to complete the transition and enable the ability to face forward.

Complete the transition plan: A completed transition plan will ensure that there are no obligations which keep you tied to the organization. This completed plan will also support the organization and your colleagues to move forward in an effective way. Make sure you hand your completed transition plan to either your supervisor or human resources in the organization and celebrate this accomplishment.

Revisit your hopes and expectations for the future: Over the past three weeks self care and reflection have been essential elements in the transition process. Revisit the hopes and expectation that you wrote down. How have these shifted and changed? What else might you add to this list? Where might you seek supports?

Engage in self care and reflection: The three week transition process has likely been a mix of reflection, planning, documentation and emotions. Fear and curiosity are two emotions that seem to be at the polar opposite sides of the journey. And yet, fear and curiosity can take us toward anticipation and the future. Take the time for self care throughout this transition journey. You are not alone. There are colleagues in your network who are on similar journeys or trusted allies who will support you and be there for counsel and advice.

SECTION 5

Termination & Transition

Termination & Transition

Not all transition processes are led by the employee. In some cases, the organization initiates the termination of employment. Navigating the termination of employment process is filled with emotions but also requires proactive thought and action by you. Termination can be a particularly emotional time. This section provides helpful advice, reflection questions, exercises and practical steps to navigate a termination process.

Section 5: Termination & Transition

Not all employment transitions provide adequate time to prepare and plan. Employment terminations happen for a variety of reasons.The organization might be facing financial challenges and have to decrease the number of employees. There might be strategy and/or structural shifts inside the organization resulting in an employment termination because the position or skills are no longer required. The employment may be terminated because of a performance-related issue.

In some cases, the employee is notified of the termination of their employment and is immediately removed from the workplace which means they immediately lose access to their technology and work files. In other cases, the employee is terminated but may be provided with time to close off their files and clean up their workspace.

Even though the employment has been terminated, you can still be proactive and take steps to navigate the termination process well. This section details the steps you can take as an employee to manage the termination and transition process.

The Termination Meeting

Termination meetings are almost always very formal and short meetings. The employer will likely have a prepared statement and will not get into a discussions with the employee. There is usually a second person involved in the meeting who acts as a witness. If your organization has a human resources department, the meeting will likely be led by your supervisor and involve a person from human resources.

The termination meeting often feels cold and formulaic. There will be different emotions that you experience during the termination meeting.

Remember to keep your composure. You will likely be provided with a formal letter and further information about the termination process and next steps. If you do not receive these, you can request both a formal letter and any additional documentation including a record of employment.

Seeking Legal Advice

Many termination processes will include a short meeting with either your supervisor or human resources and a letter from the employer detailing the terms of the termination. Once the meeting is concluded, you will want to review the letter, and the terms identified in it.

There are two steps that you can take at this point. The first is to seek information online about employment termination processes. Many governments have regulations and procedures about how to terminate employment and you will want to ensure that the proper process has been followed by the employer. There are also online legal resources that can be consulted.

Depending on your situation, you might engage a lawyer and seek a professional opinion. This will ensure that the termination process and terms offered are consistent with your seniority, length of time with the organization, position and current regulations around employment terminations.

Self Care & Navigating Your Emotions

The termination of employment directly impacts your emotional state. You might be experiencing surprise, anger, regret, and shame. These emotions are very real and might come in waves over the next few days and weeks.

Developing/completing the off-boarding document for the organization

An employment termination also requires an off-boarding process. All organizations should have an off-boarding document in place to ensure that both the individual experiencing the transition and the organization are able to manage the process effectively.

Technology hardware and software is particularly challenging during a termination process. An information sheet for the employee about technology, uploading and deleting files to a shared information system, and deleting access to shared programs including finance and human resources programs is essential. This information sheet will ensure a more seamless transition.

If the organization does not have an off-boarding document, you can be proactive and use the list below as a guide for off-boarding during an employment termination.

Typical off-boarding checklists contain the following elements. This list is useful for both the employee and the employer.

- Completion of termination paperwork
- Communication of the exit both internally and externally
- Completion of a handover document
- Collection of company assets
    - May include laptop and other computer equipment, phone, ID/Access Card, uniform, company credit card, company vehicle, other assets
- Deletion of access to software programs
- Arrangement of final payments and benefits
- Collection of updated contact information for the employee
- Updating internal documents including the organizational chart
- Updating external documents including organizational website and other online documents

Given the number of transitions experienced by organizations, a transition checklist is an important and essential tool for both the organization and the employee. It should be shared with the employee to ensure both parties are aware of the organizational expectations and requirements.

Self Care & Navigating Your Emotions

The termination of employment directly impacts your emotional state. You might be experiencing surprise, anger, regret, and shame. These emotions are very real and might come in waves over the next few days and weeks.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions.You don't have to share these emotions with anyone but use them to acknowledge your current state. Continue to capture your emotions and consider the following questions.

Today, I am feeling the following emotions about my transition process.	
This is what I think I need to care for myself right now	
This is what I will do to act on these feelings and emotions.	

As time progresses, consider the following questions:

- How have your emotions shifted?
- Who can you turn to for advice and support?
- What are you looking forward to as you progress through this transition?
- What are your fears?
- What strategies can you put into place to manage your fears?
- What questions do I have about what just happened?
- What can this experience team me about my next steps and future employment opportunities?

In some cases, the organization may offer access to counselling and other post-employment supports. Take the time to research what is offered and how you can access available as they could be valuable to you as you navigate the termination and off-boarding process.

Consulting trusted allies

Trusted allies are important during all stages of every transition journey. Reaching out to trusted allies can help you navigate the termination of your employment. They can provide perspectives that you may not have considered. In the case of employment termination, you might look to allies who could provide employment coaching and contacts. Be open about your situation and invite their perspective and advice.

Consider the following:

- Who are trusted allies that I can connect with during this transition phase?
  - Write down the names of 5 people you will contact as a trusted ally
- What support am I seeking?
  - Write down the specific support you are seeking.
- What questions do I want to ask them?
  - Write down 4 to 5 questions that will inform the conversation
- How do I open myself up to their advice?
  - Take notes during the call or meeting both about the advice
  - Note your reaction to the advice
  - Write down actionable next steps
  - Send a thank you note to your trusted ally

Maintaining a relationship with the trusted ally during this time is important. If you are successful in the next phase of your transition, send them a note or email to let them know how their support made a difference.

Letting Go & Facing Forward

Experiencing the termination of employment is fraught with mixed emotions. It may take time to fully navigate your emotions. Reach out for support and counselling to navigate this time.

It might be difficult to fully let go of your connection to your former job and employer. Consider the following about your former role. These are important questions to ask yourself when you have left or are terminated from an organization and will set you up well as you engage in interviews for your next opportunity.

- What were the key functions of my former role?
- What contributions did I make during my time at the organization?
- What specific results were achieved as a result of my work?
- What specific skills did I bring to the organization?
- What skills did I develop during my time with the organization?
- What is the one thing that I did that made a difference?
- What are my hopes for the future?
- What are my fears about the future?
- How can I integrate my responses to the above questions to begin to face forward?

These questions are designed to help you with the process of facing forward. Consider your contributions and skills as you begin to consider your future.

The next section of this resource takes you through a post-transition planning process. When you are ready, begin your journey of facing forward. **The Post Transition Process** will help you to build or deepen new habits and prepare you for what is next in your journey.

SECTION 6

Post Transition

Post Transition Reflection & Planning

The post-transition phase is designed to support you to move forward proactively. It focuses on how you can use what you learned about yourself during the 90 day, three week transition or termination processes. Spending time reflecting on your contributions, achievements, and on self-care are essential for your future growth and employment journey.

Both the pre- and post-transition processes include useful questions, resources and tools designed to help you move through the entire process. These questions are designed to identify and understand your locus of control, and what you might be able to influence during the transition process.

Two underlying reflection questions during any type of transition are:
·What about this transition is making me feel powerless?
·What about this transition process can make me feel powerful?

Because transitions, both positive and negative, are emotional, it's important to intentionally build in time for self-care and reflection. Proactively focus on what you can do to ensure that the transition process and experience is positive for you and the organization or role that you are leaving. The intention of this resource is to leave well and to ensure the transition experience is positive.

Several reviewers of this resource found it helpful to jump back and forth and between sections. It gave them additional information and additional reflection time. Each transition journey is unique. You can use and adapt the resource to suit your unique needs and experience.

Section 6: Post Transition – Developing and deepening new habits

Congratulations, you made it through your transition process. Unfortunately, it is not yet completed. This final stage, post transition, is an opportunity to deepen the new practices and habits you built both in the pre-transition and during your transition journey. Those accessing this resource will have different transition experiences. Some of you are starting new jobs with another organization or changing a role in your current organization, some are taking a break from your existing organization and planning a return in the future, some of you have been let go from the organization and others are entering retirement and a transition from the work world. In each of these cases, these transition experiences are real and most certainly varied.

A gift that any transition offers, regardless of the circumstances that led to it, is that it disrupts your typical day-to-day routine, creates a natural time and space for self-reflection, and opens up an opportunity to reaffirm, clarify or transform your current career and life path.

Planning for the post transition experience is meaningful. Engaging in a thoughtful and designed approach will help you navigate the stages post transition. This section provides advice and suggestions for the next three months (90 days) following the completion of your transition process. It is designed to help you leverage the learning and insights you have gained into an ongoing practice. Even if a transition is not one of your own choosing, it still offers the gift of an opportunity to pause and take stock.

Reflection Questions

The post-transition process starts with a reflection session. Identifying the personal, belonging, work and transition implications that have been part of the reflection process will help with the planning and implementation post-transition.

From a personal perspective, consider what you learned about yourself and your ability to navigate your emotions during the previous 90 days. How did your emotions shift through out the past 90 days and how did you navigated these changes? How are you feeling right now? How are you viewing transitions differently now?

A lack of belonging and identity are real for individuals transitioning from one role to another. Reflect on the elements of belonging and identity that you experienced in your formal role. What made you feel like you belonged? What contributed to your sense of self and agency? How might you look for and create these in this next phase of you? What practical steps can you take to build a sense of belonging and identity? If you have been in a role or at an organization for a long time, it may be difficult to distinguish and fully appreciate how your personal identity, achievements and capabilities and reputation align with – and/or are distinct from – that of the organization.

Consider the transition process as a whole. Write down the elements that worked well and consider what might be improved? What blind spots did you encounter and how did you navigate them? What might you do in future transitions.

We experience significant changes and transitions frequently. Reflecting about the transition process will build your resilience and confidence in effectively navigating future transitions, both those that impact you directly and those t where you are playing the role of a partner, a colleague or a trusted ally.

Self Care – Navigating Fear and Building Agency

This resource is designed to support you, the individual navigating the transition process.Throughout the resource, the practice of self-care is prominent. In the post-transition phase, engaging in self-care is equally important. While there are different types of transitions, each transition process should include the practice of self care as you navigate a range of diverse emotions.

Take the time to consider each emotion and add more to the list. What are you feeling right now? Consider what actions might be taken to navigate this emotion at this time.What have you discovered about what you need to support yourself well during transitions? In some cases, reaching out to a friend, colleague, or trusted ally will help uncover next steps and possible solutions.

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 ais 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.

Emotion	What I am feeling right now	Actions required to navigate this emotion
Fear		
Identity		
Belonging		
Grief		
Self-Doubt		
Agency		

Consulting trusted allies

Trusted allies are important during all stages of the transition journey. Reaching out to trusted allies can help you to identify blind spots and they can provide perspectives that you may not have considered.At each stage of the transition process, you might reach out to different allies. In the post transition phase, you might look to those allies who could provide employment coaching and contacts.

Consider:

- Who are trusted allies that I can connect with during the post-transition phase?
  - Write down the names of 5 people you will contact as a trusted ally
- What support am I seeking?
  - Write down the specific support you are seeking.
- What questions do I want to ask them?
  - Write down 4 to 5 questions that will inform the conversation
- How do I open myself up to their advice?
  - Take notes during the call or meeting both about the advice
  - Note your reaction to the advice
  - Write down actionable next steps
  - Send a thank you note to your trusted ally

The Johari Window is a useful approach when consulting trusted allies. It is a framework to improve your self-awareness of your conscious and unconscious biases. The Johari Window is divided into four quadrants:the open area (things you know about yourself), the blind area (things you don't know about yourself, but others do), the hidden area (things you know about yourself but keep hidden) and the unknown area (things that are unknown to you and to others). The Johari Window can be used to build connection and trust, increase self-awareness and understand what others know and don't know about you. Using the Johari Window can provide insights and practical next steps in the post-transition process.

https://www.fearlessculture.design/blog-posts/the-johari-window

Building your personal future plan

Connecting with trusted allies is just one step in the post-transition, facing forward process.Taking the time to develop and build a future plan will provide actionable next steps for you.

Part of the building of a personal plan for your future should include the revisiting of the transition plan document. Consider what worked during the transition plan and what changes would have enhanced the outcomes. Also take note of the insights and clarity that you gained from the process and what, if any, lessons you want to bring forward into your next role(s). Build your reflections into the post-transition plan document.

As you move through the next few months, re-visit your post transition plan frequently, update, and adjust as needed. Transitions occur more frequently than we imagine, documenting the process of transition, will ensure that you are prepared for the next transition that comes along. You will play a proactive and engaged role, leading to more positive outcomes.

Build your Forward Facing 90 day (three month) workplan

Month	Forward Facing Actions
First 30 days post transition	· Review and rebuild your personal transition plan · Reflect on the transition process just completed – what worked, what would you change · Self care – what do you need now and where can you find support · Building a list of trusted allies, questions, and connections · Set 30 day goals for you future forward plan o What goals do you have for the first 30 days? o What goals do you have for the second 30 days? o What goals do you have for the third 30 days?
Second 30 days post transition	· Review first 30 days – what worked, what might you improve? · Self-care · Connecting with trusted allies · Goals for the second 30 days
Final 30 days post transition	· Review second 30 days – what worked, what might you improve? · Self-care · Connecting with trusted allies · Goals for the final 30 days · Building your next 90 day workplan (if required) · Keep the transition resources you have build in an accessible spot to refer to them during future transitions

Your first 30 days in a new management role: How to start strong by Maryam Taheri provides useful advice and 8 specific steps for new leaders to follow as they build toward success in their new role.

1. Listen first, speak second
2. Know the business, not just your team
3. Build personal trust – not just professional authority
4. Look for small, targeted wins
5. Align early with your manager
6. Share your values and be explicit about your expectations
    a. Decision-Making (consensus, consultation, or a closed/direct?)
    b. Communication (Slack, email, meetings?)
    c. Feedback (how often, how direct?)
    d. Priorities (what is non-negotiable?)
7. Build psychological safety
    a. Admitting what you do not know
    b. Owning your mistakes
    c. Asking for input and actually using it
8. Create and share a 30-60-90 day plan
    a. First 30 days – observe, listen, make sense of the system
    b. 60 days – make conscious changes, clarify team objectives, develop connections
    c. 90 days – propose and lead some shifts, change processes, improve performance

Additionally, Taheri provides suggestions on what not to do when beginning a new position. These include not jumping in to fix problems too quickly, not micromanaging or over compensating, and not engaging in difficult conversations. She also suggests engaging in the human side of the organization by learning the culture of the new organization, working collaboratively and not treating the experience like the job you have just left.

So, begin to lead intentionally. Choose clarity over charisma, depth over speed. Drain the need for control and cultivate credibility. You are not to prove you have all the answers but demonstrate that you will arrive at the best answers with your team (not above them).

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.

It does 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