



Word of Wisdom Regarding Nonprofit Transitions of Leadership

A change of leadership is one of the most important and challenging opportunities a nonprofit Board will face. Properly managed, leadership transition provides a pivotal moment, enabling organizations to change direction, maintain momentum, and strengthen capacity. Each transition is unique and usually far more complex than the simple hiring decision it appears to be.

The following recommendations and insights are based on post-transition interviews with over 200 nonprofit Boards, outgoing as well as incoming CEO's and Executive Directors (EDs).

A thoughtful transition allows an agency time to reflect before jumping into search mode:

- An opportunity to review agencies strengths and challenges
- Time to review or renew their strategic direction
- A period of Board leadership renewal
- New opportunities to seek support from current funders. Many funders favorably support some or all of transition costs as a way of leveraging their program investment
- An opportunity to explore strategic collaboration with another agency
- An opportunity to form a small, but representative, transition committee to lead the process in a timely manner while allowing input from appropriate constituencies

Allow for a good beginning by planning a good ending:

- Proper farewell and thank you to outgoing ED
- Set a firm date for the EDs departure
- Understanding and dealing with departing leader's legacy, loss, and issues
- Change management support for staff can be very helpful in cases of long-term our founding ED departures
- Pro-active communication about transition to stakeholders
- Set clear expectations/boundaries with outgoing ED about future involvement in agency
- Take time to clarify how the transition can benefit the agency, rather than rushing to fill the position with the first candidate that comes to mind or posting the previous job description.

Clarify the vision of the organization:

- Don't rush straight to recruitment, it will cost you more time and frustration in the end
- Make sure the Board, staff and key stakeholders speak with one voice about the current and potential opportunities as well as threats facing the organization
- Ensure agreement and clarity about the vision, values and priorities of the organization moving forward
- How does the community view you (check your references before the candidate does)
- Are there internal or external issues or relationships that need to be resolved before bring in a new leader
- Clearly communicate opportunities and challenges to candidates

Develop a clear and unified understanding of the organization's leadership needs:

- Identify and prioritize the skills and attributes needed to lead the agency in the next 3-5 years
- Hire for the future, do not simply re-post or file the job as is
- Clearly state the responsibilities and authority inherent in the job based upon the needs of the agency and clearly defined expectations of the Board, staff and stakeholders
- Avoid knee-jerk reaction for or against candidates who share qualities with the outgoing leader

Develop realistic search expectations:

- Don't expect a diverse talent pool without aggressive networking and outreach
- Be prepared to offer a competitive salary
- Don't get buried by the hours required by the search process and evaluation of applicants
- Plan for a consistent and cohesive search committee that is representative of the organization (committees who meet regularly with 90% plus participation find they have much smoother transitions and success in identifying and recruiting their next leader)
- Typical transition takes 4-7 months (search is 2-3 months of the time) and an average of 240-300 collective hours for a 5-6 member transition committee. With consulting support, the time commitment for the Board can be reduced by 50-75%.

Get additional help or guidance:

- Board needs to increase commitment during leadership gaps
- If needed, interim Executive Directors can help day-to-day management and give the Board much needed time to launch a realistic search, but don't expect or encourage them to be a candidate for the permanent position
- Seek outside guidance from someone with specific experience in nonprofit sector transitions

Check candidate's background and references early in the process:

- Check out candidates before your final interview. It is harder to cast a critical eye or listen to input once they are a finalist.
- The final interview process provides an opportunity to clarify issues raised in background check. For some agencies this can be as simple as a review of credit, DMV and criminal backgrounds.

Provide proper welcome, clear expectations and support:

- Avoid succumbing to exhaustion and abandoning new leader during the critical first 90 days.
- Plan for an appropriate welcome, orientation and introduction to constituents
- Establish mutually agreed upon performance goals and evaluation process within first three months with quarterly updates
- Provide support and professional development to supplement the new leaders skills
- Avoid micromanaging