

On Nonprofit Leadership Transitions - A Roundtable Discussion

February 28, 2019

Brief Summary

Introductions

Phil Li and Liz Sak opened by talking about why they decided to pull together this discussion. Phil noticed that the transitions predicted a decade ago are now starting to occur and he thought others were seeing the same thing. Liz – who funds youth organizing – agreed with Phil and found in her work with smaller organizations that these transitions were often destabilizing. Liz also was hearing from grantees that funders were holding back funding until after a transition was worked out, leaving the groups in an even more precarious situation. Both Phil and Liz wanted to hear what other funders were experiencing and learn ways to help groups make successful transitions.

Each participant (see attached list) talked about why they had come to the roundtable discussion. The list below captures most of the issues that were raised.

- Recognizing how transitions are different in this political moment
- Providing supports for new leaders, especially
 - when moving from white founding/long-term executive directors to people of color execs
 - in small organizations that already have few resources and the executive director wears many hats
 - in places such as Latin America where leaders' lives can be in danger
- Observing the need to put systems in place in youth and other organizing groups to be able to maintain operations during a transition
- Focusing on the (negative) role of the board of directors in hiring/overseeing leaders, such as
 - not understanding the executive director job/role
 - not trusting new/younger/POC leadership
 - not providing needed supports to new leaders
- Interrogating why there are no local/internal leaders to step into the executive director role, particularly for youth / organizing groups where leadership development is a core strategy
- Acknowledging leader burn-out especially among younger leaders
- Figuring out how to deal with (sudden) transitions that reveal or are due to cases of sexual harassment, inappropriate behavior, or other similar issues
- Finding out that long-term leaders are staying because they can't afford to leave and/or don't know where to go
- Supporting new models of leadership such as co-directors
- Needing to find the resources for a good and extended leadership transition, groups simply don't have enough financial support.

What Can be Done

Frances Kunreuther and Sean Thomas-Breitfeld of the Building Movement Project provided some background on leadership transitions including the need to address the nonprofit racial leadership gap.

Then the group discussed what they wanted to learn/share with others. Some comments/questions raised were:

- If leaving is a leadership function, what does it look like for foundations to support transitions in a holistic way?
- How can we address the criticism people face when they feel they need to step down?
- Why is it that west coast youth organizing programs seem better able to discuss and prepare for leadership transitions than those in the east?
- We are asking leaders in our annual visits how they are feeling about the next five years; that opens up truthful discussions about transitions.
- Our foundation's board needs education about transitions and why they should be supported.

Examples of successful practices include:

- Movement, funder, organization, and exiting leader think together about what is needed in the ecosystem to make a gradual, successful transition. Exiting ED was explicit about supporting the transition for the organization and the movement.
- Running groups for smaller NGOs so women leaders, many experiencing burnout and trauma, can have a space to share with one another. Transitions are part of a larger context with the focus on collective care and holistic safety.
- Convening exiting leaders to learn more about the transition and its implications for them and their organizations; also plan to convene incoming leaders.

Moving forward – suggestions included:

- Continue the conversation/format
- Document leadership transitions that could be good case studies
- Think about how foundations can invest more in transitions
- Talk with staff beyond the CEO/ED
- View transitions as part of a movement strategy
- Provide tools for boards to support organizations in a different/better way
- Develop models for how to support grantees
- Understand support during transitions that includes information on organization's life-cycle; focus on organizational readiness
- Do something together/strategies for how to provide support for shared grantees
- Normalize transition
- Research on how affordability is preventing leaders from leaving
- Support more collective approaches so leaders can come together to prevent transitions based on issues such as burnout (example of new mothers)
- Learn from convening leaders in transition and convening new CEOs
- More on leaving as a leadership function