

# Leading a Nonprofit Leadership Transition:

## Practical Ideas to Help Ensure a Successful Hand-Off to the Next Generation



### *A Checklist for Executives*

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- ▶ **Assess readiness for a leadership transition.**
  - Assess your own capacity to carry out a leadership transition and outline your priorities, such as timing and post-transition goals.
  - Determine your organization's need for capacity-building and the resources required to accomplish it.
  - Identify unresolved issues that will shape the leadership transition, such as staff expectations, budget concerns, organizational challenges, etc.
  - Assess the possibility of one or more internal candidates. This question will be among the first asked.
  - Consider whether outside expertise should be tapped.
  - Articulate why a leadership transition is in the best interest of the organization.
  
- ▶ **Build the team and create the expectations and culture for change.**
  - Communicate early with your Board Chair.
  - Rough out the "map" for the work ahead, as well as the roles for key players in the process (e.g., the Board, you as executive, staff, consultants, etc.)
  - Discuss your resource needs and funding approach. Explore funding support, if appropriate.
  - Develop a communications plan to alert stakeholders such as the Board, key funders, staff, partners, and colleagues. Think through both general and audience-specific messages.
  - Keep messages simple and clear. Your job is to inspire confidence and trust in the process and be as transparent as possible. Stay focused on the mission and the future.
  - Start communicating with your Board and key funders. Make sure it is two-way and you listen for honest feedback.
  - Communicate with your staff. Both giving and receiving feedback is key to setting a positive and forthright tone to the process.
  - Be open to questions. It's OK if you don't know every answer.
  - Normalize the transition project through brief but regular updates at standing meetings. Find balance between confidentiality and transparency.
  - Consider having a braintrust of colleagues who can serve as sounding boards.
  
- ▶ **Firm up how the transition will be carried out.**
  - Start to address in greater detail the timeline, budget, roles, and specifics for the leadership transition and any organizational readiness work.
  - Spell out the specific costs and fundraising approach.
  - Craft an organizational readiness plan with a concrete timeline and budget.

- Discuss with your key stakeholders what kind of leader is needed for your organization's future. Address priority qualities and possible tradeoffs. Outline a job description.
- Talk about your own role post transition—will you maintain a formal relationship? Posit scenarios and decide whether or how to include your preferences in the search process.
- If appropriate, engage staff leaders in re-thinking organizational roles to redistribute some of your responsibilities and tasks.
- Develop in-house leadership as fully as possible. Provide mentoring and support if and when existing staff take on new responsibilities.
- Take the time to define the roles of those involved in the transition process: Board members, executives, staff, and consultants. Be clear so there are no surprises and the process is—and feels—transparent.
- Fully engage the staff, gathering input and perspectives about the process.
- Determine how to conduct the search.

▶ **Begin the transition process.**

- Once a search process is established, begin concrete preparations for the change.
- Notify the widest circle of colleagues. Ask for candidate recommendations.
- Focus a bit on your own plan, even if it is a “bridge” plan. Knowing your next step will help as the actual transition approaches.
- Keep your Board and staff updated, but not overwhelmed. Stay focused on the mission and program.
- As the search progresses, engage staff in preparation for a new leader. Develop six-month work plans for program and operations, including strategies, goals, and project descriptions. Assemble important background information and key operations information, such as team descriptions and standing meetings.
- Address as many management issues as possible.

▶ **Complete the transition, once the new leader is selected.**

- Develop an announcement plan. Start with the Board, key funders, staff, and select colleagues. Then, go wide.
- Plan and carry out an orientation to support the transition.
- Plan your own exit and future role with the organization based on conversations with the new leader and your Board.
- Complete the hand-off to the new leader, providing support to him or her as planned.
- Take time away from the organization, fully, even if only for a pre-determined amount of time. This absence will give the new leader the opportunity to establish him or herself in the new role.

▶ **Start your next act.**