

Leadership Transitions

When founders and long-time leaders leave

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October 19, 2017

Goals

- ▶ Understand the unique characteristics of Founder/Long-Term-Leader transitions
- ▶ Identify the risks, opportunities and strategies involved in executive transition
- ▶ Identify the critical junctures for transition readiness
- ▶ Understand three dimensions of transition management and how to manage them effectively

Who We Are

TSNE MissionWorks partners every year with hundreds of nonprofits, foundations, community-based groups and others working for social change. We help **strengthen leadership, facilitate learning, guide strategic thinking, and build organizational capacity** through our dynamic mix of management and consulting services, training programs, grantmaking and community investments.

Who's in the Room?

Why focus on leadership transitions?

Risks

Opportunities

Challenges

Organizational Transition:

Three key stages

Sustainability Planning

2-3 years in advance

- Developmental
- Proactive
- Review: models, strategy, structure

Succession Planning

1-2 years in advance

- Intentional Plan
- Proactive
- Review: models, strategy, structure

Executive Transition

12- 6 months in advance

- Manage departure
- Executive search or Interim placement
- Thrive

Emergency Succession Plan: Baseline Tool

Three Dimensions of Leadership Transitions

- ▶ **Personal** Transitions
- ▶ **Organizational** Transitions
- ▶ **Management** of Transitions

Transitions: Coming to Terms with Change



William Bridges, Managing Transitions

Personal Transitions

For Leader

- ▶ Identity
- ▶ Letting go of position and power
- ▶ Loyalty to mission, organizations
- ▶ Legacy
- ▶ Negotiating role beyond departure
- ▶ Career/professional next steps
- ▶ Financial planning

Personal Transitions

For Leader

An Executive Director preparing for departure has three jobs:

- The “regular” ongoing work
- Managing one’s own personal/professional transition
- Managing the organization in transition

Personal Transitions-Founder/LTL

Key Personal Tasks

- ▶ Set date
- ▶ Identify and address unfinished business
- ▶ Say goodbyes
- ▶ Negotiate terms of departure
- ▶ Get clear about role and boundaries after departure
- ▶ Embrace celebrations

Personal Transitions - Founder/LTL

Key Supports and Resources

- ▶ Engage with a good coach
- ▶ Have a trusted confidant
- ▶ Manage change in relationships, prepare to say “goodbyes”
- ▶ Find a “What’s Next” peer, cohort group
- ▶ Engage a financial advisor
- ▶ Ensure regular open communication with Board Chair

Personal Transitions

For Staff: Changing Relationships

- ▶ Loss of the familiar
- ▶ Loss of security and protection
- ▶ Risks or limitations
- ▶ Perceived void of leadership
- ▶ Opportunities emerging
- ▶ Time to process – important to work into the schedule

Personal Transitions - Staff

Key Supports and Resources

- ▶ Name and normalize transition anxiety
- ▶ Provide opportunities for confidential processing
- ▶ Understand and have confidence in those managing the process
- ▶ Participate in and contribute to the process

Personal Transitions

For Board

- ▶ Loss/change of a relationship
- ▶ Strain on personal relationship
 - Need to look beyond loyalty to focus on what's best for the organization

Personal Transitions - Board

Key supports and resources

- ▶ Name and normalize transition anxiety
- ▶ Have open, honest, confidential dialogue about shifting power/authority
- ▶ Offer opportunity to name personal level change/loss
- ▶ Understand the transition plan and process – including time and commitment

Personal Transitions - Board

What is your experience with managing an executive transition?

- ▶ *Was it challenging on a personal level?*
- ▶ *Did you experience anything unexpected?*
- ▶ *Suggestions, advice to others?*

Organizational Transition: Sustainability

Aiming for...

- Resiliency &
- Adaptability

Through...

- Proactive planning
- Building strength and capacity throughout the system
- Identifying and addressing dependencies and vulnerabilities

Organizational Sustainability

Purpose

Leadership

Partnerships

Resources

Culture

Operational
Excellence

See Org Sustainability Checklist

Organizational Transitions

Key Tasks in Founder/LTL Transitions

- Review ED role – is it realistic, manageable? Is there a need to restructure senior leadership?
- Document and codify things that were inside the founder's head and heart
- Look for ways to distribute power and knowledge more broadly In particular – who is holding key relationships with donors?
- Assess the ED salary – is it above or below standard practices?
- Clarify expenses related to departure

Organizational Transitions

- ▶ Emergency Succession Planning
 - Quick win, starting point for the organization as it prepares to engage in full succession planning
 - Preparing for an *unplanned* ED departure
 - A risk-management best practice
 - Opportunity to create a more “leaderful” agency

Handout

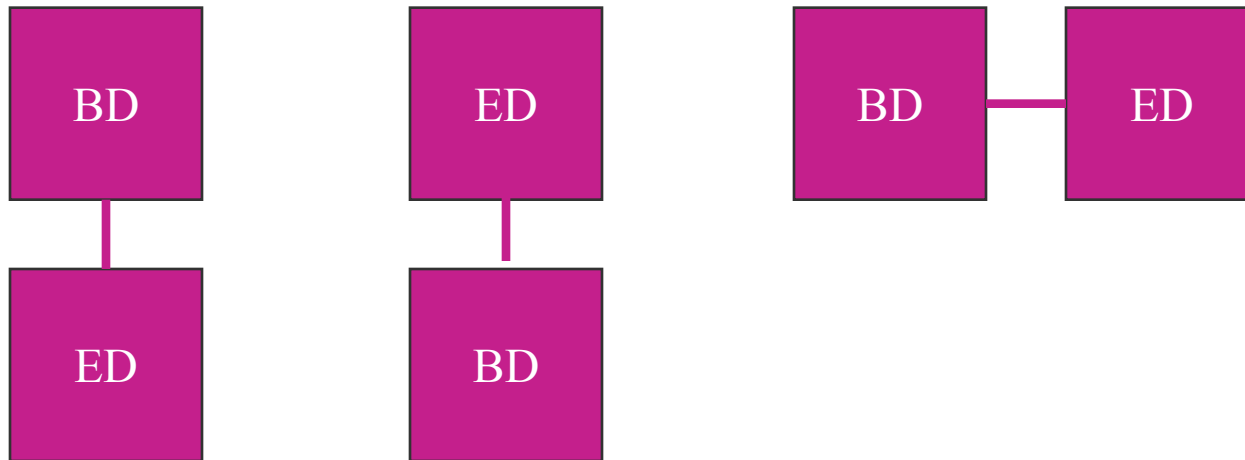
Organizational Transitions

Role of Board Shifts - Stepping Up

Board Responsibilities	
Mission/Strategy	Risk Management
Resources/Development	Board Effectiveness
Leadership	

Organizational Transitions

Board - Executive Relationship



Is there a need to rebalance responsibilities? In what ways?

Organizational Transitions

In what ways do organizations need to change when founders leave?

What would contribute to those changes being greater or smaller?

Three key moments

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Management of the Transition

- ▶ Board charges a “Transition Team”
 - Board members
 - Staff representation
 - Limited role of outgoing ED
 - Consultant?

Transition Management

Key Tasks with Founder/LTL

- Set date of departure
- Timing of announcement varies
 - ~18-12 months
- Negotiate ED priorities in final months
- Develop departure package (Board)
- Define relationship/boundaries after departure
- Plan celebrations and honor legacy

Interim Executives

- ▶ Advantages of external “Intentional Interim”
 - *Experience a new person in role*
 - *Evolve the role of ED*
 - *Targeted expertise— Organization development*
 - *Not a candidate for permanent position*
- ▶ Advantages of internal interim
 - *Continuity with past*
 - *Key relationships cultivated in advance*
 - *Known*

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Upstream Opportunities: building sustainability and planning for succession

- Sabbatical for trial period of absence
- Internal leadership development - bench strength
- Transition key relationships, funders, donors, etc.
- Update strategic direction and priorities
- Create optimal conditions for new person to arrive focused on the future
- Consider merger, strategic alliance, partnerships
- Explore alternative executive leadership models (e.g., co-director/shared leadership)

Upstream Opportunities

- Address gap (if exists) between communities served and organizational leadership
- Create increased community ownership and engagement
- Develop new partnerships to align impact and systemic level changes

Resource List

► Building Movement Project

- “Alternative Structures”

http://buildingmovement.org.s221921.gridserver.com/pdf/bmp_structuringleader_ship_1.pdf

- “The Long Goodbye”

http://buildingmovement.org.s221921.gridserver.com/pdf/The_Long_Goodbye.pdf

► Annie E. Casey Foundation

- Executive Transitions Series

[aecf.orghttp://buildingmovement.org.s221921.gridserver.com/pdf/The_Long_Goodbye.pdf](http://buildingmovement.org.s221921.gridserver.com/pdf/The_Long_Goodbye.pdf)

- Founder Transitions, Ready to Lead, Building Leaderful Organizations, Interim Executive Directors and others!

http://publications.unidosus.org/bitstream/handle/123456789/70/Succession_Planning_for_Nonprofits_1.pdf

Resource List

► TSNE.org

- *“What’s Next” – Cohort group for long term leaders*
- *Consulting services*
- *Interim Placement and Support*
- *Executive Coaching*
- *“Creative Disruption”– Sabbaticals for Capacity Building*
- http://tsne.org/sites/default/files/Creative-Disruption_0.pdf
- *“Leadership New England” study*
http://tsne.org/downloads/Leadership_New_England_Report_TSNE.pdf

Thank You!



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