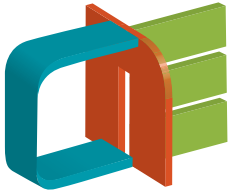


# GUIDE TO LEADERSHIP TRANSITIONS



EMBRACING GROWTH AND CHANGE



**center for  
nonprofit excellence**  
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

# GUIDE TO LEADERSHIP TRANSITIONS

How can organizations best support healthy leadership transition and integration? The Center for Nonprofit Excellence (CNE) conducted ten interviews in spring 2022 with a diverse group of Monterey County nonprofit leaders. These included recently hired Executive Directors (EDs with less than five years at their current position), community leaders and board members who had overseen leadership transitions. They shared stories, tools and strategies to support incoming or outgoing executives, boards of directors and nonprofit leaders during times of change. During the interviews, some common themes emerged:



## Look to your community and communicate with transparency throughout the search

“**Grow leadership within organizations.** I'm sure there were so many qualified [external] candidates when I was hired, but I was able to come in already invested in the programs and people. If I had been new to the organization, it would have been so different. So much of leadership is building trust and being able to support others. If they can't rely on you, and if they don't have that trust, it's not going to work. Before I started the ED job, I already knew the programs inside and out, and I was in a much better position to help and advise my team.”

– Executive Director of a human services nonprofit in their first year of leadership who was an internal hire

“The next leader will always bring something new and beautiful.”



At a time when so many organizations and businesses are looking for great people, how can an organization stand out? Who will you consider or invite into your applicant pool, and who may you have overlooked?

“**Don't be afraid to take risks.** Be open to people who may have been program or event managers, or who have had opportunities to coordinate and lead in other ways. Don't limit yourself to people within your region. There are so many ways to engage people. Organizations should be flexible about 'requirements' for the position.”

– Veteran board leader of a human services nonprofit

Interviewees noted that this time of change provided an important opportunity to support Black, indigenous, people of color (BIPOC) and other candidates from historically marginalized communities and identities to step into leadership roles. Some organizations felt transitions were opportunities to demonstrate values around equity and inclusion, and that building a diverse “next generation” of leadership would better serve Monterey County nonprofits and their clients and stakeholders.

“**I had built equity with people in the organization who knew me from a job I'd held there some years before. We share a cultural background. When we had challenging conversations during my first years as an Executive Director, they already knew me as someone who was willing to listen and would include clients in decision making: this is how we need to treat the people we serve.**”

– Executive Director of a food and agricultural nonprofit

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## Look to your community and communicate *continued*

Some interviewees felt the time was right to strategize alternative leadership structures and consider that compensation might need to be increased for staff who take on additional responsibilities during the transition. They stressed the importance of cross-training and empowering multiple voices from within the organization during transition.

“**Be as transparent and authentic as possible about your transition process and future plans, but don't air dirty laundry. The best thing you can do is express support and gratitude for the outgoing executive and communicate with the public that the core of the organizational values and impact are not contained in any one person. The next leader will always bring something new and beautiful.**”

– Veteran board leader of an educational nonprofit

Board leaders also emphasized the importance of clarifying staff roles and expectations for the search process. They reflected on the challenge of involving staff and soliciting feedback without burdening them.

“**My preference is to send out an anonymous staff survey early in the process. Another thing we do to **involve staff** is to review all applications together as a committee. At that stage, if there's any 'hard no' from the staff, we don't move that candidate forward to the board.**”

– Veteran board leader of an educational nonprofit



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## Embrace the moment of growth and change

New leaders were enthusiastic to improve systems and reframe challenges. Many had started their positions just before or during the COVID-19 pandemic and had to adapt programs and diversify revenue streams. Interviews were conducted with leaders who had transitioned into their role within the last five years, and a common theme was job satisfaction centered around growth: personal and professional growth, growth of program and mission impact and organizational growth to better serve and support staff and stakeholders.

“**You need to involve the community in change, so it often happens slowly, not radically, which can be hard for a new leader. Sometimes you feel like no one wants anything to change, but you have to adapt to survive. Early in my tenure I pushed too hard for change, and found you have to work incrementally, you have to find balance. As I've settled into my role, I see things with a bit longer time perspective.**”

– Executive Director of a cultural nonprofit in their third year of leadership

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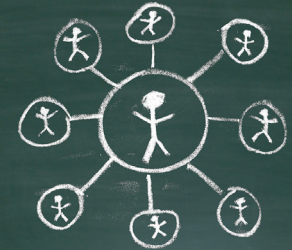
## Build a network of support for new leaders

When asked what advice they would have given themselves before starting a new leadership position, interviewees emphasized the power of coaches, colleagues, mentors, friends and other professional networks. They reported feeling especially supported by fellow leaders in similar positions in their field through industry associations or informal gatherings.

“*The job can be lonely. Board members are great, but they’re volunteers. It’s important to find a community of people facing similar challenges who understand what you’re going through.*”

– Executive Director of an educational nonprofit in their first year of leadership

“You have to have a board that has your back.”



Board members reflected that unsuccessful transitions happened when their team was not clear about organizational boundaries and expectations, and lacked a shared vision.

“*Assumptions were made about board and staff roles that were perhaps misaligned. The board needed to show more leadership in a time of change. The leader thought they had a green light, but the board wasn’t on the same page.*”

– Veteran board leader of a human services nonprofit

Veteran board leaders and new executives encouraged regular, effective dialogue between the new executive and a designated board committee, especially early in the leader’s tenure when they are looking for support and confidence. Board leaders noted that executive transition often accompanied change at the board level as well. They encouraged boards of directors overseeing leadership change to ask themselves two questions: “What is our organization looking for in its new leader?” and “How do we need to change to put them in a position to thrive?”

“*You have to have a board that has your back. Especially during the first year. Good communication with the board is vital. I love my board!*”

– Executive Director of a cultural nonprofit in their third year of leadership



## Commit to a transition that reflects your organizational values

New leaders expressed the importance of building trust within their communities and trust in themselves. They spoke about the power of finding their voices and growing confident in their decision-making instincts.

“*Go with what your gut tells you. Try to lead from your values and come in and do what you would have liked your boss to do when you were in the staff members’ position.*”

– Executive Director of a food and agriculture nonprofit in their fifth year of leadership





## Invest in great people

All interviewees stressed the challenges the nonprofit community faces due to the cost of living in Monterey County. Each new leader dealt with staff turnover during their first year. They emphasized the need to be creative about hybrid work environments, support for working parents and caregivers, Paid Time Off (PTO) policies and other perks and benefits that should complement a commitment to raising wages in the sector. Some leaders were eager to create new positions to invest in resource development but were hesitant due to the ongoing uncertainties of the pandemic and the day-to-day tumult of the job.

“We’ve got to get rid of this idea that if your job is personally fulfilling you can put up with low wages.”

“**We’ve got to pay people more.** We’ve got to get rid of this idea that if your job is personally fulfilling you can put up with low wages, especially in our housing market.”

– Executive Director of a human services nonprofit in their first year of leadership

All interviewees stressed the importance of the relationship between the executive and the board president and noted that their effective collaboration and communication was essential to the success of the transition.

“**Rely on external expertise.** Get help. It can be hard to invest in the board of directors, because they’re not income generators, but it’s so crucial that the board works well.”

– Veteran board leader of a human services nonprofit

## Thank you so much to the leaders who shared their stories.

Participating leaders whose voices are included in this guide represent organizations located in Big Sur, Carmel, Monterey, and Salinas, and provide services throughout Monterey County. Their average annual budget is approximately \$1 million. Interviews were lightly edited for clarity. The full **Stories and Strategies for Leadership Transition Report** and an accompanying resource library are available at the CNE website.



[cfmco.org/CNE](https://cfmco.org/CNE)

### About the Center for Nonprofit Excellence

The Center for Nonprofit Excellence of the Community Foundation for Monterey County works with nonprofits of all types and sizes to be stronger, more resilient and equitable. We help staff, boards and volunteers make meaningful connections to resources and one another.

“This project would not have been possible without the interviewees’ wisdom and candor.”



– Reid Norris,  
CNE Leadership  
Development  
Specialist and  
guide author





# Strategic Transition Planning Checklist

## 1. Is your leadership transition planned or unplanned?

- Do you have a written, board-approved succession plan?
- Is there someone in your organization who can serve in a temporary role, if necessary?
- Have you identified a search committee?
  - What is your plan to interview and vet candidates?
  - How will the hiring decision be made and communicated throughout the organization?

## 2. What resources are available to you?

- How much time do you have?
- What capacity will your outgoing leader have to work with the new hire?
- Is hiring a search firm or consultant feasible?

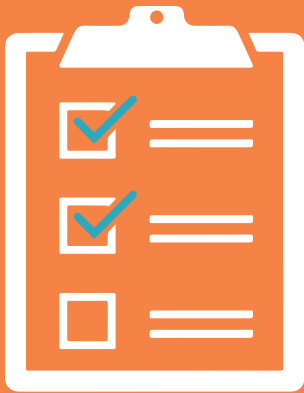
## 3. Do you have:

- Current job descriptions and position manuals?
- Logins, passwords, and security data?
- Current financial records?
- Keys/physical access to office and property?
- Contact information for partners and stakeholders?
- Key organizational documents?
  - 501(c)(3) determination letter and articles of incorporation
  - Bylaws
  - Strategic Plan
  - Organizational Chart
  - Employee Manual
  - Workplans
  - Mission & Vision statements

## 4. Is hiring an interim leader feasible?

- What are the pros and cons?

“Be as transparent and authentic as possible about your transition process and future plans.”

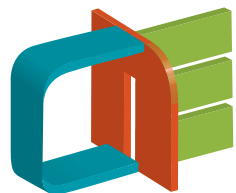


# Values-based Transition Planning Checklist

- 1. How are your organizational values reflected in the search, hire and integration process?**
- 2. What attributes, skills and experiences are most important in your search for your new leader?**
  - What biases or preconceptions influence your perspectives about who your new leader “should” be?
- 3. What steps will your organization take to engage authentically and successfully with BIPOC candidates and candidates from historically marginalized communities and identities?**
  - In what ways do your policies, structures or leadership culture need to change?
  - What support might be needed for this process?
- 4. How will you decide whether to make an outside hire or promote from within?**
  - Is the organization thriving?
  - Are organizational or industry-specific skills required for the job?
  - Is the organization in need of strategic or cultural change?
  - What specific skills and experiences are needed that your current employees may or may not have?
- 5. Who will you involve in the hiring process – board of directors, staff, stakeholders?**
  - Are you seeking input and advice, or sharing power in the hiring decision?
  - What are the areas where the board needs help?
- 6. Do you have a plan in place to train, integrate and support the new leader?**
  - How will you identify shared values and create a vision for the future?
  - How will you foster belonging and inclusion between the new leader and the existing team?
- 7. Is the leadership position you’re hiring for sustainable?**
  - Are there opportunities to restructure positions or responsibilities to better support your staff and serve your mission?
  - In what ways does your organizational structure perpetuate unhealthy dynamics of power, access and privilege?

“What is our organization looking for in its new leader?” and: “How do we need to change to put them in a position to thrive?”





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