



BRIDGING THE GAP

**Intergenerational
Conversations, Reflections &
Recommendations for Non-
Profit Executive Director
Transitions**

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INTRO

When long serving Non-Profit Executive Directors leave their role it is a pivotal moment in an organization's lifecycle. When handled effectively, leadership transitions can lead organizations to resilient futures continuing to serve critical missions. When mishandled, these transitions can lead to a decrease in organizational productivity, missed opportunities, burnt bridges, and negative community impact. Transitions can even lead to organizations closing down, merging or re-inventing their approach.

Let's start a new dialogue around Executive Director transitions!

Through honest and courageous conversations, we can achieve better outcomes for all stakeholders involved in long-time Executive Director transitions.

As you read this, take the time to reflect and consider...

What can I learn from these stories of transition?

How might this change my approach to future transitions I am involved with?

This report was written by Michael Prosserman from EPIC Leadership Support Inc. This qualitative research white paper highlights seven anonymized perspectives of Canadian non-profit Executive Directors who were directly involved in leadership transitions. All participants have been given an opportunity to review their quotes to provide feedback. Interviews were conducted in person or via video conference. We chose to anonymize participants to allow a more open and candid conversation. This gives an opportunity to share stories we often don't get to hear.

Participants include seven Executive Directors of Canadian non-profits of varying size and focus areas. Participants were selected to gather a diversity of experiences and perspectives. The report aims to help readers gain a snapshot into the perspectives of two groups directly involved in non-profit leadership transitions by capturing the experiences of:

- 1) 4 x Longstanding Executive Directors who have recently left their roles,
- 2) 3 x Young, emerging Executive Directors taking on these roles for the first time

Everyone who contributed to and authored this report have directly gone through Executive Director leadership transitions.

WHY I WROTE THIS REPORT

My name is Michael Prosserman and I am the CEO of EPIC Leadership Support (www.epicleadership.ca). After leaving my role in 2018, as the founder of Unity Charity after 15 years, I struggled with my transition both personally and professionally. I learned a ton from diving into transition and it was an incredibly emotional journey. I had no one I could talk to about it because no one really understood what I was going through. I did the best I could and followed what felt right. In the end it was a dream transition. Throughout the report you will find parts of my personal experiences weaved in as part of the narrative.

Executive Directors don't often get the opportunity to share their experiences about their transitions candidly. I found there was a lot of taboo in sharing how I felt with others during and after my transition. There was little to no peer learning or stories told directly by those who had experienced transitions that I could find.

This led me to dreaming up this research project. I wanted to interview long-time leaders who had made the transition to gather their unique experiences as well as emerging Executive Directors taking over these vital roles.

I wanted to start a new conversation around long time leader transitions.

Transitions are natural and every Executive Director will go through at least one in their career whether it is by choice or otherwise. It is part of a lifecycle of an organization.

I am aiming to encourage leaders to move away from a "me" versus "you" mentality around transitions and towards a "we" mentality. We need to work together. To get through transitions successfully, it is my belief that we need to look at each individual involved as part of an interconnected and interrelated ecosystem of support.

I wanted to share the stories, told directly by those who experienced them. There are a ton of undocumented learnings in the sector, which present major opportunities for learning and reflection on how to improve organizational outcomes during these essential transitions.

PURPOSE, GOALS, INTENTIONS

Executive Director transitions have caused a lot of challenges as well as led to new opportunities within the non-profit sector. Every non-profit Executive Director's job eventually comes to a transition point and there are lots of young, emerging leaders looking to take on new levels of responsibility.

The purpose of this report is to identify common practices, barriers, lessons learned, and recommendations on how we can build stronger bridges to support more sustainable and healthier Executive Director transitions.

This report is intended to be used as a tool to spark intergenerational conversations between longstanding outgoing leaders, incoming emerging leaders, their boards of directors and the wider non-profit sector.

The intent of this report is to learn what people who have experienced these transitions have gone through to identify supports needed to build more viable career paths for young leaders and support long-time leaders in their future success post transition. The aim is to build empathy and understanding from sharing lived experiences so we can better prepare Executive Directors and their boards for healthier leadership transitions while attracting and retaining young leaders in the non-profit sector.

This is not to paint concepts presented as “good” or “bad” or “right” or “wrong”. It is intended to share people's real stories, their honest reflections on what happened, what worked and what didn't. This is about having people share their truth without censorship. It is intended to provide a window into stories we don't usually get to hear around leadership transitions.

There are some 'wise practices' out there. With this in mind, context is critical. Some long-time Executive Directors want to stay involved after their transition, some don't. Some Board chairs are very self-aware and attune to their role, some less so. Some organizations have great operating reserves saved up, some can't even pay their incoming Executive Director's salary. This report is not intended to provide answers but to encourage more reflection and better listening within your context.

We want to encourage leaders to aim for the best possible outcome for the organization's mission, cause and beneficiaries. Ultimately, *how do we effectively manage outcomes for as many stakeholders as possible and create bridges of organizational continuity during transition?* This is not to neglect the individuals involved. It is a careful balancing act to serve the needs of many diverse and interrelated stakeholders while putting mission and organizational continuity first.

PARTICIPANT PROFILES

FIRST TIME EXECUTIVE DIRECTORS INTERVIEWED:

1. First time Executive Director. Held many non-profit roles manager and director roles throughout career. Took over Executive Director role after a long time founder who started the organization over twenty years ago. Founder has had a lot of trouble letting go during transition. Since this individual came in, there have been three Executive Director attempts in three years. The founder was heavily involved in the transition before, during and after the hiring. This individual has been in the role for one full year and continues to make attempts to honour the founder amongst the challenges they have faced. In less than one year they have turned the organization around – establishing a strong future vision, restructuring teams and programs, establishing new accounting and internal systems and processes, and stabilizing cashflow.
2. First time Executive Director of a longstanding community-based organization. Moved from another province to live in Toronto with their family. Eventually they applied for the job to be an Executive Director reluctantly as they were more interested in writing a novel. Knowledge from previous leader was not transferred effectively as the hiring process was delayed to find the right person. This was not malicious in any way however it did pose several challenges. This leader had to learn the Executive Director role from scratch in most cases on their own. This new leader worked with what they had and salvaged the information they could. It was an organization that was overprogrammed, understaffed and always chasing funding. Eventually the stress became too overbearing and this emerging executive decided to step down to take care of their mental health and focus on taking care of their children.
3. First time Executive Director who had no plans of running an organization. This individual had volunteered on several community boards and funders decision committees in their youth and while going to school. They volunteered for the organization they would eventually take over. The board turned over during this time and the organization was salvaging the remaining pieces. This leader came in and build a strong team culture. This leader grew the organization from a \$20,000 operating budget to over \$1 million in just a few years and built a program that impacts the lives of hundreds young people living in priority communities. This leader attended several leadership development programs as they ran their organization and learned how to be an Executive Director on the job.

LONG TIME EXECUTIVE DIRECTORS OR FOUNDERS INTERVIEWED:

4. Long-time Executive Director with more than twenty years as an Executive Director in three different organizations. Spent around eight years in each big role and has gone through four separate leadership transitions. Moving from a funder early in their career to an Executive Director. Was very intentional about each career change and provided huge value to each organization they led. Took jobs where they were fascinated by the set of challenges the organization had ahead. Has set a great example of what great leadership transitions can look like. All of the organizations this individual has left continue to thrive.
5. Executive Director at a national organization they had worked at for over twenty years. Moved from fundraising to Executive Director role over the years. Was eventually recruited to work at a much larger organization in a senior leadership fundraising role. The board struggled to hire a new Executive Director. A few years after they left, the board decided to close down the organization.
6. Founder who built their organization over fourteen years. Took the organization from a start up to a charity with national reach. Eventually started thinking about leaving their role and began to vocalize the idea of succession planning to the board of directors. The board didn't take them seriously until they brought it up several times and eventually this led to a hiring process. This leader was involved in the hiring process until the final candidate was selected. Once the candidate was selected the board asked the founder to not be involved any longer. This leader began raising red flags about the new hire. The founder moved on and got a job as Executive Director of another bigger organization. Only a few years later the organization they had founded fell apart under the new leadership and the board decided to close the doors.
7. Founder of a grassroots program that grew quickly within their community. Got a job as Executive Director of an established, thirty-five-year-old organization with a similar focus. Decided to make the program they founded into a staple program in this larger organization. There were several team culture issues, and internal conflicts. After a few years this individual was fired without cause and no explanation by the board. The organization kept the program this Executive Director brought into the organization even after letting the Executive Director go. This individual was incredibly hurt and confused by this for several years and felt disempowered. This individual experienced mental health challenges during this time. Eventually they got a new job as Executive Director of another organization and now they do not get as attached to their work and focus on their family.

REFLECTIONS

This section contains mixed reflections from both long time and incoming Executive Directors from their experiences related to their transition. I thought it would be a good first step before getting into recommendations to better understand the raw internal dialogues, motivators, personal reflections and feelings of those going through transitions. Context is critical when it comes to transitions and this section paints more information about the nuanced context that some of these transitions carry.

Everyone has a story

An Executive Director reflected on what they learned after being in one role for over twenty years, “A lot of learning, a lot of personal growth, learned a lot about human beings, not to judge people because everyone has a story. Very often our first assumptions when we meet people are wrong.”

Uncovering major challenges

“The founder wanted a multi-year transition. The founder sent me a job offer with an organizational chart with the founder in a leadership position. The offer came from founder, not the board chair. This was a big red flag. I responded, ‘there is no room for me to be reporting to someone else, I need to report to the board.’ Founder came back saying, ‘I completely understand, I just want you to take the job, so why don’t I draw a lateral dotted line as an advisor instead of boss?’ I also noticed a few discrepancies in the by-laws that provided the founder with unjustified decision-making power. I didn’t feel comfortable taking a position where the founder had operational involvement. I wasn’t sure if I was comfortable having founder on the board. At that time, the founder was so adamant about having me that everything was ‘yes’.

The founder advocated for me in terms of compensation. At this point I was now aware there were a few missed organizational attempts to transition a new leader. I only found this out right before I accepted the job. I went through the full process and did not know there were major challenges within the organization because the details were masked very well. I learned there were several people who didn’t complete the leadership transition which provided me with sheer adrenaline and excitement. I’m very competitive and at that point I thought I’m going to be the first.

In the interviews I kept asking about finances, I looked at the financial statements and they looked really good. There was a lot of money in the bank. When I kept asking, all I got was ‘it’s really great’, we’ve been around for over 20 years, we’re super sustainable, and I naively took their word for it. When I started I couldn’t get any information about how much money was in the bank. After seven weeks on the job I finally got access to the bank info. There was only one third of monthly operating expenses in the bank and we had no reserves. I felt terrified, panicked yet lit up and ignited. It was a ‘holy shit,

what are we going to do?’ kind of moment. I do some of my best work in crisis. I just jumped into action. Trying to get a historical sense of cashflow, trying to talk to people about the ebb and flow of the organization. Immediately cutting costs.”

A founder who got fired

“The board members came in, the chairman and the treasurer. I kind of knew that something was going to go down two weeks prior to that meeting. There was a complaint about me. The way the board reacted and the way they talked about it, made me feel like no one was on my side. I felt like I was talking to a wall. They told me, ‘We would like to thank you for your last few years. We are giving two weeks’ notice. You can stay two weeks or just give us your keys and you can leave right now’. I felt shocked. I was like, ‘Are you serious?’ You actually decided to go that route instead of all the other possible options you had; talking, investigating, pausing, leave of absence, professional development. I still don’t know why this decision was made. I thought, ‘What do I do now?’. Do I go fighting with fists and fight to my core? There were so many decisions I needed to make over the next few days. A friend suggested go get a lawyer, but I just decided to completely walk away.

I just gave up. I completely gave up. I was too attached. The pain was unbearable. I still don’t have a reason why it happened. By the time everything went down, I was already so exhausted and burned out, I couldn’t take it anymore. It’s tough when you dedicate 15 years of your professional life to a single cause. All of a sudden you are left without a cause. I was questioning what is my cause? I had a mental breakdown, a total breakdown, and no one could help, or actually knew that I needed help.”

The perfect storm for burn out

“There was no down time. Historically we had three months to reflect but it never felt like that happened for me. As soon as we came back from the holidays we didn’t have any time to pause. We had no time to reflect and think. This was very challenging for me. The amount of programming that fell on to me and the lack of a proper transition that happened at the beginning. All of it fell onto me. All of those of things created the perfect storm for burn out. I don’t know how I survived. Being a mother to a young child was very challenging. I felt like I wasn’t being a present parent. I feel like I’m the primary caregiver in many ways. I left the job because I got pregnant and I simply couldn’t imagine a life where I could be successful in this role with two children. That should say something for the nature of this role.

I’ve had significant mental health challenges throughout. There was no mechanism for me to stop the momentum of the organization. The board was always supportive only because I always delivered more than I even needed to sometimes. The board wanted me to stop working so much. Whatever I set my mind to I put my all. It connects to my identity. I love the organization, I care about it. If I fail, I feel it is because I am a failure.

This mentality really effected my role. My output and performance are high. I just don't stop. I am literally not going to stop until even after my contract is done."

The organization has benefited from allowing me burn out

"The negative is that I suffer. I have tried to implement self-care to various degrees of success. It is set from the top. If I'm not doing my self-care then people are going to model this behavior. The organization benefited but I suffered a lot. I quit because I can't see me operating any other way. There are people that can achieve the level of performance I achieved while taking care of self, but I couldn't figure it out. I think this requires a lot of time in a role, or maybe education or skills. I need to find a way to not work as many hours to do something that someone else could do in half the amount of time."

Overcoming 'imposter syndrome'

"I now understand the value I bring. Earlier I had the sense of being an imposter in the role. Trusting my experience helped me get over this. By constantly adding new experiences, identifying what I needed to learn, and bringing others to the table to support decision-making, confidence grows in being able to be authentic as a learning leader. When I feel I'm not sure about an area, I seek out learning, coaching and mentoring – in multiple ways. I've had a mentor, and we've now known each other almost two decades. We say we are each other's mentors. When you know you can problem solve with another person in a similar role, who understands the challenges you both face as non-profit leaders with Boards and staff, you reduce your isolation and get more assurance about the way forward. It's a process -- constantly building new ways to lead and support."

Sacrifice

"It's been so rewarding to be here for so many reasons. Being amongst an incredible community, being able to work with teammates who felt like family, I was able to transform and grow the profile of the organization. On the other hand, I really sacrificed my own personal life and creative life. Being a parent and an artist was really challenging in order to achieve success."

I spent at least a year ruminating on the transition in my head

"I didn't just wake up someday and it struck me. And it wasn't because I wasn't loving everything I was doing. I could have done that for the rest of my career and been very happy. By the time I was actually ready to say it out loud, I floated it out at a meeting as a sideline, 'whenever the day comes that I may move on'. After I referred to it a couple of times. A board member eventually said, 'I heard you say that once or twice, is there something I should know about?' I told them I don't have any plans but wanted to enhance our governance to be prepared. I didn't have any definite timeline."

How I made it through what seemed like an impossible transition

“When there is crisis, you need someone who just drives change and doesn’t wait for consensus. Before I thought this was a flaw in my leadership style – being a driver, but in those moments of urgency I know now that it’s actually required, you can’t fall behind, and have to maintain a fast pace to overcome a crisis. How can I build enough trust, credibility and alliance with the board to support this style of change? In order to overcome crisis, I was calling funders to move cheques so we made payroll. I learned by this time of year that our credit cards were usually maxed out and the founder used to make a loan to the organization. I had to just cut costs, big costs. I cut everywhere I could find after doing a lot of analysis. There had been no accountability in how money was spent. I looked at specific outcomes for each program and allocated realistic cost to achieving those. A lot of how we survived was cost cutting and the immediate restructuring of programs and teams.”

I saw red flags but the board didn’t listen

“I was on the interview team as the founder. All of the interview candidates said all the right things. The candidate we selected behaved differently then they interviewed. The person had been a senior person in a much larger organization but never been an Executive Director. The person wrongly assessed that they needed to make major changes because they needed to prove themselves, a common leadership error. I started raising red flags about new Executive Director, and then the board chair asked me to stop showing up to the office. It started to go the wrong way pretty early. The new Executive Director came in with the wrong attitude, which was totally different from the interviews, with little to no respect for what originally enabled success in the organization in terms of people, relationships and ways of operating. Unfortunately, the organization had to eventually close down.”

Reflecting on the life of an organization

One of the long-time leaders interviewed received shocking news the day before our interview that their former organization was closing down, “Maybe I should have been more involved, maybe I should have helped more after I left. If I allowed myself, I could easily feel guilty, but in fairness I shouldn’t feel guilty because I had given so much over the years. The reason why I stayed for so long was it was always new and changing. It was always moving, evolving or shifting. That’s how we survived, we adapted. Organizations have to have a rebirth or they will die. Things are always changing. Social media didn’t exist when we started the organization. You needed to meet people where they are at.”

My biggest wins as a new Executive Director

“Making it through the financial crisis without going under, without not taking a salary, without loans, I think that’s one of the biggest accomplishments that I feel. But the biggest one is the team. I spent so much time being critical of teams I’ve worked for; I’ve

found most organizational cultures to be stifling, cold, lacking in honesty and often volatile. I used to always wonder, do I just talk the talk, am I going to be able to create the team culture I want or am I just naive. I really believe that we have the team that I've always wanted to be on. We have the office we all want to go to. My team tells me they feel that way too. I feel so lucky. We created this. A team that is highly competent, can navigate disagreements, and jurisdiction, and loves being together, aligned with a common goal and a genuine care for one another."

It's lonely at the top

"It's important to be friendly with everyone but not to be their friend because you never know who you're going to have to have one of those difficult conversations with and that's why it's lonely at the top. You have to walk a fine line, you don't want to be arrogant or act like you're at a different level but you have a different role."

One young leader's path to becoming an Executive Director

"I had to run community-based programs a ton as I grew up. I worked with a grassroots organization as one of my first jobs when I was 16. I was on a grant review team as well at this time. I was very data oriented. Being on a grant review team, on the other side, I was reading hundreds of applications. If I didn't understand what they were trying to achieve I didn't advocate for them. It helped me be very critical. Sometimes I read grants and knew these people didn't even know what they tried to achieve. I was able to learn what 'meaningful impact' could mean. As a person living in a low-income community, I didn't know this type of work was possible. I saw organizations go from grassroots to big time quite quickly. I also had a job running youth programs. I got promoted to run multiple sites. I did this part-time while in school.

In high school you don't get access to this knowledge. I got an interesting preview of what non-profit work really is. It stuck with me. When I had my frustrations with what I was seeing in my community I looked for organizations doing the work I could join. I did not approach my current organization wanting to run it. I just wanted to volunteer. I love working with youth, I always have. I started tutoring in high school, that really opened my eyes to disparity in education. It showed me how far confidence goes in terms of you doing well in life. I was just helping to show my students they can actually do this. I saw the difference that a little bit of opportunity had for me.

There was such a lack of diverse programming in my community. The available programming was so unengaging. These youth needed to be meaningfully engaged. I knew no matter what I wanted to do something better. I sought out this Executive Director job as an opportunity to get engaged with my community. I signed up as a volunteer and met the Executive Director. We were chatting, and I said something to the effect of, 'This organization has so much potential.' As a joke, the Executive Director said, 'You're probably going to end up running this one day.' Eventually we had lunch

with the Executive Director and a board member. They started talking about how they were planning to transition soon. I told them, 'I'll hang out and help out with things.' I don't even know when it went from volunteer to Executive Director. One day I just woke up and I was running the organization."

Finding a fascinating set of problems to solve

"I took gigs where there was a fascinating set of problems to solve. For example, organizational transitions, working beyond the boundaries of Canada, organizational change, how you can create a human workplace amidst change, and changing the size of the organization."

Reluctantly I applied for the position

"It was my first time as an Executive Director. I had just been in Ontario for a few months and moved over from Western Canada. I was exposed to Executive Director life by witnessing my partner who was an Executive Director. I was writing a novel at the time. Reluctantly I applied for the position, I just wanted to do my own independent arts thing.

I wrote a really stellar cover letter and resume. I did a lot of research about the community we were serving. I contacted community members. I did a lot of research on how to prepare to be an Executive Director. I got the position. I wasn't surprised, I tried so hard to get it, over ten hours of preparation. I was called, I remember walking on Bloor street in the Annex. I got a call from the chair of the board of directors who offered me the position. They kept delaying the hiring process because they weren't finding a candidate that was suitable for the role or the community. At that point, they didn't have an Executive Director in the role for several months. They needed me to onboard as quickly as possible. It was the height of their programming."

Governance in small organizations

"From a governance perspective, in the small charitable space, especially when there is a founder, there is this delicate balance between proper governance. Founders assemble a board that is going to support them yet they report to that board. The board has to believe in you, what you're trying to do, and they want to volunteer their networks to what you're trying to do. Organizations and governance evolve. It is important to recognize - and appreciate - that the standard governance model is different in the early stages of small organizations."

A spark that led to an idea from lived experience

"As a founder, I kind of fell into the role. I didn't choose to be an Executive Director. I wanted creative freedom to run an organization but it wasn't about a certain role. I started an organization in Scarborough. I grew up where the community is, I grew up in the field, I thought I could do it so much better than others, better than nothing at all. No money, no volunteers. I fell into the role because no one was taking the lead. Before

this, I started as a senior staff in a prestigious organization. I continued to rise in that organization. I said 'no' to a full-time role and left. It took me a year and half to build my idea, unpaid role, young family, took contract gigs, and said 'no' to a few awesome opportunities. I look back and ask, 'Why was I so stubborn? Why couldn't I just let it be and take these full-time jobs?' My blinders were so strong, and I fought so hard to make it work how I wanted to work.

There were long few first years, having a young family, Toronto winters, trying to build this idea into something big with no budget except some personal savings. No website, no team, no location. And as the years passed, our small volunteer team built one of the biggest cultural events in Toronto. I am proud of many achievements, regardless of challenges. Our thinking was that we must make the world a better place! Once people were able to see us deliver, they saw us as industry experts, and our local underrepresented voice was heard at different tables, allowing us to bring other forgotten voices to the discussions.

I'm the best parent when I'm challenged professionally

"The former Executive Director was looking forward to retirement and needed a successor. The cause resonated and it felt full circle. It connected to my experience, I was ready for a really big challenge, and I had just taken two years off with family. I'm the best person and parent when I'm challenged professionally. I found out about the position from a recruiter."

Reflecting on my needs

"After getting let go I questioned, 'Do I need to be in this sector?' It's not bringing me the right closure, the right finances, I'm just so disconnected. It was a battle for years, so why am I fighting for this so much? I took a year to reflect on personal and professional goals. A lot of reading, a lot of pausing, searching, contemplation. I considered being a program staff, a consultant and various jobs. Do I just pretend I have that experience? So, I meditated, went for a run, and stayed in bed for a week. How I got out of it? Slowly, and by letting go. Lots of searching, looking back, and looking forward. I just let go of some of my previous unhealthy notions. I have much more confidence in what my role is and how best to move forward given everything I've experienced up to this point".

Supporting founders in transition

"To think of what the founder lives, how much we ascribe our identity to external validation, particularly when you're creating positive social change, so much of your life is 'you're doing such great work.' To step away from that and have someone take it from you, I think is impossible. Preventative action and succession planning needs to involve a much more raw, soft and personal development side for founders. When a founder goes to the board about succession, I think there should be the question: "What kind of counselling are you paying for to dig into that identity piece?"

Thoughtfully announcing my departure

“I had to be comfortable with the decision myself, then make it more external. I had to start to hear myself say it, it was part of my process to begin to share it with people. I was not ready to put a timeline on it. When I say I’m going to do something, I will. Saying the words, hearing myself say the words and then have someone else question the words, that started the conversation. A year before I left I finally made a statement to the board, ‘As I have mentioned casually in the last year, I need to eventually move on, we need to actively put this into motion.’ This is very personal when you create something and try to disconnect yourself from it, you’re meshed together with it. Trying to make it a separate entity from you is next to impossible. **Your organization is never off of your mind when you’re a founder, it’s part of you.** It’s hard to force that process. I tried to hire someone to nurture into a successor role. I thought that would be the ideal situation but that didn’t work out. I wanted this organization to have life beyond me. I left when I felt it was ready to give to the next leader.”

The first year in a job

One founder reflected on their experience in their first year on a new job after being in their previous role for over 20 years, “One of my greatest fears is the first year of a new job. I felt very respected in my previous job for many years, I had proven myself. When I started my new job, people didn’t know me, I had to work very hard to achieve success, I had to prove myself and it takes a long time before I felt secure. In the past, I was respected for my history and achievements and here I had to start from the beginning on my professional reputation.

Shifting my focus to fundraising

One first time Executive Director reflected on what led to their organization’s rapid growth, “I took the fundamentals Association for Fundraising Professionals course. It was a 2-year pilot program for diversity and inclusion. This program gave me a crash course in fundraising and hooked me up with mentors. Executive Directors should be intimately involved in the fundraising process. If they are not, you are digging your own grave. If you are not building relationships with the funder base, you lose all of those funders when your development person leaves. I was so immersed and concerned with programs that I did not realize I needed to give myself more to the fundraising aspect. I was so passionate about the work. I needed to change how I channeled that passion. I needed to channel that passion into the grant writing, into the asks. I just needed to stop being selfish as to how I used my time and that would be a disservice to the communities we serve if I’m not doing what I’m supposed to do as an Executive Director. That was an interesting transition but it was good for me. I started fundraising and we started growing exponentially from there. I started to delegate things that I did not need to do anymore. Since I started we took the organization from \$20,000 to over \$1 million annual budget.”

Unlearning in my new role

One participant reflected on their experience switching to a senior level fundraising role after being an Executive Director for many years, “I communicated to the board of directors something I thought I needed to do my new job as a fundraiser. Then a board member came to my office and said you don’t have the authority here to make those decisions. Then I realized I was no longer an Executive Director. You have a lot of power as an Executive Director to push an idea into fruition. At that moment I felt very disempowered. As an Executive Director the buck stopped with me. I could also move things forward. Now that I’m no longer an Executive Director I have to fall into another rhythm. There have also been many times in this new role I’ve said I’m really happy I’m not the Executive Director, remembering the pressure that came with this role.”

The education of a life time

“This has been an education of a life time. We had thirteen employees and up to 150 volunteers. Being able to manage different personalities with different working styles has been incredibly challenging yet incredibly important for me. I embodied a servant leader approach. Within two weeks of my job I had to manage a huge HR issue and bring in a lawyer. I had to co-create an accommodation plan with the staff, a lawyer and someone from the board. I never thought I’d be doing this. We had thousands of people attending our programs. The fact that it was meeting our equity standards and well organized was big for me. We were bringing together community relations and stakeholder management. Relationship building has been important.

Finance was a big learning for me. We had a surplus when I came in, but projected to have a deficit by the end of the year. Between budget cuts and fundraising last minute, I took what was supposed to be a \$25,000 deficit and I narrowed that gap down to \$2,000. I made some major decisions around programming for this to be possible. I’ve really improved my leadership skills. This is something I will take forward into my next career. I’ve learned a ton about management, relationship building, programming, fundraising, and community engagement. I’ve become more process oriented. I used to think I’m an introvert but I’m actually not it turns out. It took this Executive Director role to teach me I’m more extroverted than I had imagined.”

Watching my organization fall apart after the transition

“I have some resentment for some of my board because of the outcome. Ultimately it is the Board’s responsibility. Some of them were taking the path of least resistance. They should have stopped, taken a breath and allowed me to articulate the concerns and been interested in what I was observing. They didn’t stop long enough to hear me. I would have loved to have an in-camera meeting with the board. I don’t think anyone around the board table had ill intentions, but they really did not understand what it truly takes to run an organization like this. I think ultimately, they were embarrassed that things went the way they went. The organization ended up shutting down.

I compartmentalized it, wrapped it up neatly with a bow and put it on a shelf. What was probably hardest for me was when things started to unravel and the community started reaching out to me. I felt like I was letting down hundreds of participants, but I would never say anything. I just kept my head up and kept smiling, and it was tearing me apart to watch it falling apart. That was really hard because I knew I could fix it. A lot of people contacted me, will you come back? I decided, I wouldn't go back."

I wanted to leave on a 'high note'

"I spent a lot of personal think time, heart time, reflection time. I knew in my heart that if I was going to move on I wanted to leave the organization at a high. For me, a 'high note' was leaving the organization reasonably financially stable, money in the bank, I decided at least half a year of operating plus multi-year partnerships in place. It also involved having a lot of initiatives on the go that were well established and had a life of their own. I wanted it to be an attractive leadership opportunity for somebody."

BARRIERS

This section contains a mix of barriers identified by both long time and incoming Executive Directors from their experiences related to their transitions. The goal here is to better understand what holds people back from success in transitions. Some barriers are hard to talk about or even articulate as they are so raw and sometimes invisible. Barriers are key to consider when trying to set up a successful transition. It is important to navigate barriers through communicating honestly, transparently and through open dialogue as they arise. Ongoing discussion about internal and external stakeholder barriers can help identify opportunities to adapt your approach throughout your transition.

Not knowing what I was stepping into

“My biggest barriers to success were founder interference, a lack of information and knowledge transfer, and walking into an unhealthy organization and not knowing it.”

Conflicting realities, a careful balancing act

“We were juggling multiple, sometimes contradictory truths with the stakeholders involved. I felt a lot of internal conflict where my needs did not align with my organization’s needs throughout my transition but I always tried to reflect in these moments with the intention of putting mission first. It wasn’t easy but self-reflection was critical in this process. A lot of these conflicts were internal and unseen, but I felt them deeply and had to negotiate with myself to do the right thing. I knew we could do this.

I had to learn to let go. The organization's mission and team were my north star. It was a juggling act and if I look back the only thing I wish I did better was take care of myself during and after the transition. I want what's best for the organization I've given so much of my life to yet I don't have a plan for myself after I leave. I am physically not well yet my organization needs a strong leader today. A starting point in addressing these issues is to realize that multiple feelings co-existed for me as we tried to find the best way forward with the mission at the forefront of each decision. The challenge was in learning to hold space where my needs and the organization’s needs were in direct conflict. The balance is critical. Learning to hold conflict and contradiction without rushing to judgement or emotional action. Smooth transitions take work from a wide variety of internal stakeholders as well as internally for leaders.”

Deeply rooted organizational history and power dynamics

“The point that everything fell apart was the point where process improvements that I was making were perceived to be throwing the organization’s history and essence out the window. When I was speaking to building on what we do, it was really well received. When I got into the day to day, that was when it fell apart. Small process improvements were perceived as an attack on the history of the organization.

With the founder we are in a worse place than I ever could have imagined. They actively try to turn people against the organization, they are hostile, and are our biggest block. They have created the most financial detriment not only in trying to tear down existing donors but in reckless spending that I'm still uncovering. It is a horrible and hopeless place to be. Even though objectively speaking I believe I did a good job, I tried as best I could to be empathetic, to respect them, to honour them and still at the end of the day I feel like a total and complete failure. My dream is a situation with a founder that would be a harmonious and loving relationship that respects and believes in what I'm doing. But I don't have that, I have the furthest thing from that. I tried from a place of kindness within my heart to do what I thought would be best for this organization. I don't think I did a bad job, I stayed grounded. It's not to put the blame on them, but more empathetically, if they had more supports in place, more honest conversations, then maybe they could have been in a more positive place. Maybe it's through resources, and capacity, which drives the reason we are writing this report."

Attachment led to suffering

"When it's happening it's like a drug, when you get a grant that's working towards a specific idea. Organizational failure felt like a personal failure. Success felt like a personal success. The organization is almost a living thing. I only realized how close I was attached when I decided to let go. During my time there I ran with my idea, all of it had to be just perfect. All these attachments of how it should be and how successful it can be. I was in the moment and loving it. There is a lot of merit in the idea that our greatest sufferings come from our attachments. But I would rather lose my organization than my own sanity, my friends or my own health. Now I'm in a new job that has its own issues, but I'm not as attached to them. I'm bringing my experience to the table. I don't have to be as attached, and surprisingly this approach seems to be working much better, leading to great results in a shorter time span."

Charities are vehicles for positive social outcomes, they are not owned

"Charities are their own organism. If you look at business cycles, organizations are alive; they breathe, grow, evolve, digress, and sometimes die. Culture is made up a million different things including history, people, engagement, impact, and so much more. Organizations are their own entity. It's kind of like having a kid and thinking you own your child. You give birth to your child and they are their own human. Someone gives birth to the organization and instills the initial world view to shape the vision and mission. It's almost close to an ownership but once the organization moves into a sustained state it's its own thing. You need people who protect and guide that mission. I don't believe there is room in the charitable space for a feeling of ownership because charities are not owned. Charities are meant to be vehicles for positive social outcomes, we can't serve the public with one person owning it. Every organization has a soul in my mind and you have to protect the soul of the organization."

Board experience is critical during crisis

“During my time we went through three different chairs. In the five years prior to me joining, the organization had five different Executive Directors, four treasurers, three chairs, and two different program directors. They had no strategic plan and the organization was in deficit for over two years, and a major funder was about to defund them. It was very dysfunctional in relation to both program and budget. It had a fridge that was full of rotten food for months. That’s the point I came in.

The Board I reported to for two years did not have a single person who had prior board experience, and majority of them did not reside or ever live in that community. They were well educated, well intended people. But as a non-profit board member there are certain responsibilities you need to understand. From strategic planning to the right relationship with the Executive Director, they had no understanding of that.”

Getting the most out of my board as it evolved

“I have the most supportive board but it’s because I had the opportunity to build the board in our start-up phase. We didn’t have a board when I started the job. I had to work with the two board members we had to help build the board. We started by looking for a new chair and then built the board from there. I also started to understand what a board chair’s function was. I had sat on smaller boards as a ‘youth rep’ before this. The first board helped provide mentorship and get governance into place. I had a very supportive board in the beginning and this was necessary. They challenged me to do things better but I always felt like they had my back.

Now we are going through another growth transition where we need a board that is at a different level. Anything that was done poorly was a function of me not knowing how to use my board properly. I learned about the areas I wasn’t engaging the board with or communicating. I wasn’t telling the board that I needed their help and what support I needed from them specifically. I was giving the board the rose-coloured updates of what we are doing. When I was able to start talking about the good, bad and ugly and who could help me with what, it changed everything.”

My board didn’t have the capacity to navigate my transition

“In one organization I worked for the Board did not take me seriously about leaving. My board chair was not strong about this, becoming emotional when I told them I was leaving, and asked me not to talk about it with anyone yet. There were a number of delays in addressing next steps. I felt awful, I felt invisible. They told me it would be best to wait until a certain time to speak about it further, and I said, ‘actually, it won’t be best for me’. These were basics in governance, human interaction and support. I had to coach the chair into how to transition me out. I bought a book on the role of the board chair in non-profit leadership transitions and created a work-back plan. I didn’t have confidence that they would provide closure appropriately. I even had recommended

they would need to think of some way to honour my contribution. You have to let people know because they are going to ask you, ‘are we going to have a party?’ Earlier, I helped the Board set up some policies for succession. This framed different situations and a policy for each. This was the ‘hit by a truck’ or ‘win the lottery’ policy – what to do if someone is suddenly not available to be the ED. I absolutely recommend having a set of guidelines for the board to use should they need to hire a new ED, as this will give everyone confidence that it’s just a natural part of governance and leadership.”

Rebuilding

“In my transition the saving grace was that I had a couple of passionate and competent people that I inherited. They were going to jump ship but I convinced them to stay the course. Other than that, there was a blank slate. I had to clean up a lot of messes. I spent the first year equipping the staff, trying to run the programs while I cleaned up a big mess. When I opened the books, there was no documentation, no evaluation, no auditing. I was literally starting from scratch. I had to reimagine, re-envision, restart.

When I reached out to partners we had a reputation problem. This was very difficult to navigate. I had a lot of enemies in the beginning and I had a lot of doubters because I was so young. When I started we were in six communities and now we are in twenty-nine across the city. I’ve been doing this for eight years, four years as a volunteer and then four years as Executive Director. I was in school when I volunteered. We had an operating budget of just over \$20,000 when I started. Now we have hit the \$1 million milestone. It was just myself as a volunteer with contract facilitators and now we have ten full time staff and thirty-six part time staff and one hundred and twenty volunteers. We went from 250 to 700 a year of youth we consistently service.”

It was on good terms but a lot of knowledge was lost

“My predecessor was not able to have a physical presence during the transition. This was very difficult. There was very little support and onboarding. It was on good terms but a lot of knowledge was lost. The board supported a lot but didn’t have key operational knowledge. One of the board members had gone through a very similar experience as an Executive Director taking over after someone who had just had a child. I had to swim in the ocean by myself. The previous Executive Director was always a phone call away, but I didn’t know what questions to ask. I just bought a book and started learning. I took time to meet with all the staff and stakeholders. Some in person, some email, some phone call. I learned through books and leaned on senior staff.

I quickly identified the need for the organization to have stronger processes. I was very mindful of the capacity of the staff, recognizing people were underpaid and overworked. We needed more support with administrative work. This took away from my role as a fundraiser and creating community relationships. When I was burning out I had to

clearly articulate my challenges. We had too much programming. I was able to make cuts. Financially, I was able to allocate some of our surplus to an administrative role. Having that administrative support made a huge shift in my workload so I could focus on more critical issues to a point where I actually almost regret leaving.”

Leadership assessment of senior team

“The committee recommended that we develop a leadership assessment of the senior team. In banks this is common, the idea of having a leadership profile of each senior team member. The idea is to give the executive oversight and succession committee of the Board line of sight to the growth potential for individuals and if anyone internal could be an interim or a potential succession candidate. In the situation I was in, there wasn’t an ideal candidate for the full-time role, but some could have been an interim leader or co-leader. The tricky part was learning that people on the board were potentially interested in the job. There is a conflict of interest at play, and it’s essential for the Board to ensure a clear conflict of interest policy so that something like this doesn’t stall the timing, process and smoothness of the transition.”

Burn out is real

“For seven months I worked 70 to 80 hour work weeks and I had a full out mental break down in the Spring and this transition was responsible for that. That’s the real sacrifice. I made a choice and I don’t think I’d make a different choice now. My goal in life is always to learn, it’s what makes me wake up in the morning. The hardest challenges in life are the ones I learned the most from.
I wouldn’t do it any differently.”

RECOMMENDATIONS

This section shares mixed recommendations from long time and emerging Executive Directors interviewed. There are a variety of perspectives, approaches and contexts represented below. This is not suggesting “right” ways or “wrong” ways of doing things. These are simply the recommendations of those who have personally experienced a transition. These recommendations are posed to serve as ideas from experience within their unique context. See if you can find parallels or ideas that you can adapt in your setting. Feel free to remix these ideas and make them relevant to your context.

Be honest with yourself

“Spend time thinking about whether leadership is really a good fit for you. In the non-profit sector, we are plagued with leaders who shouldn’t be leaders. We have this cause drive, a sense of vocation, the next step after years of experience is the assumption that the next step is to run an organization. Do things to really understand what leadership is and if you want to do this. It’s not for everyone. Leadership can be really lonely. There is a lot of responsibility in carrying that weight. Consider, is leadership something that drives you? Is it a good fit for you to lead an organization? Or is it better to work in a different senior or specialized position than Executive Director.”

Put yourself in the equation: Unapologetically prioritize boundaries

“How do you nurture you? Put yourself in the equation. I’m not talking about ‘me time’ at the spa but I’m talking about thinking time. You have to distill. Context is what organizations need of their Executive Director and you can’t get the big picture if you don’t have time to think. I think it’s like an orchestra conductor, each instrument on its own is essential but when they come together they create this beautiful music. You have to create enough time to think to be that great orchestra leader.

Figure out what you don’t want to sacrifice. My first senior leader role I was afraid I wouldn’t be able to attend as many networking events because I had a 2-year-old. I wasn’t asking how to get more baby-sitting support. I told my boss what I needed. I was able to be frank. I don’t think anyone is going to put on their tombstone, ‘I am so glad I attended all of those networking events’. Getting good with this helped everything. I actually now have some freedoms I can exercise. If the kids make it to the provincials in soccer, I’m going to go to their games. I schedule it. You can’t be there for everything but you can choose things. You own that. Figure out your boundaries and choose things you are not going to give up. When I left my last organization, I had several graduations that I would not miss, and more than that, that I wanted to be fully present for, not taking conference calls before or after, or feeling like you have to be checking messages. I’m going to be the biggest cheerleader of these life moments. Everyone has different milestones and you need to figure out how to honour them. Unapologetically prioritize.”

Know your deal breakers

“Reflect on what your deal breakers are. What do you need? What type of leadership style do you have and how can you work that into how you communicate what you need? Know it’s going to be way harder than you could ever anticipate.”

Find your outlets to release the pressure

“I’ve raised three kids on my own and have been financially responsible for them. It’s been a challenge. I had to learn when to say ‘no’ and protect my energy. I had to recognize that my job is not a 9 to 5 job. My job is a position that penetrates my whole life including evenings and weekends. I have to show up to support colleagues. I take on the full package. You can easily get burnt out and become exhausted from it. The Executive Director job is like a pressure cooker, you have pressure from the top (the board) and below (the staff), and you get squeezed in the middle. I needed outlets to release that pressure. Otherwise I’d crack under the pressure.”

Believe in yourself

One first time Executive Director reflected on how they went about getting the job, “Excitement and passion is contagious and when people feel sincere passion they want to be part of it. This is how I got the job. If you have the ability to articulate passion, get other people excited and aligned with your passion, and then instil belief in your competency to act on what you say you can do, then you are more likely to get the job. For me, I think it is confidence and passion, maybe my resume a little bit; it’s not status quo. Competitiveness helps. Saying it’s okay to be motivated by things outside of the job, i.e. wanting to win, to be the first to do something. It doesn’t have to come exclusively from wanting to make humanity a better place. It takes a big desire to win, to overcome, to be put out in front, but sometimes these are incredibly stigmatized things to say. It means something to me that I have inner strength to show myself that I can do it. I can’t give up.”

Find a role that feeds your soul

“Know what motivates you at work. What feeds your soul in the kind of work you want to do? I think it’s important to know what motivates you as a leader. This will help you find the right role. What is important to you? Creativity? Flexibility? Autonomy? Travel? The ability to be innovative? The need for challenge? What kind of organizational culture do you want to work in? As a young person, it is not about what subjects you like in school – it is about the kind of role and work place you want to be in. You are going to be working a heck of a lot longer than you’re in school, so seek out work that you love! Figure out what makes you tick.”

Know your limits

A first time Executive Director reflected on their experience discovering their leadership, “I know I can be charismatic, I can also be the operations type person when I need to be. I saw a few types of leaders in the sector. I saw leaders who were not very charismatic but actually got things done. They didn’t have the big picture vision or ways to communicate. It’s basically a programs or operations manager who is good at that and then people say “Oh you’re good at programming? Now be an Executive Director!” There is a leadership and visioning ability that is often missing. Then there are Executive Directors who talk, talk, talk, talk, talk! They are always at the right events, meeting the right people BUT nothing is ever in order. When I unveiled the iron curtain on these groups I saw there’s nothing really going on here, they just talk a lot. I think you need a healthy balance.

The best leader knows their limits. I know what type of leader I am. I know what I’m good at. I needed to focus my energy on getting the right people to do what I’m not good at. I recognize my assets and what things I need to develop to take this organization where it needs to be. I identified my upper limits. I don’t think that Executive Directors needs to be everything, but they need to have foresight. I needed to take a step back and be BRUTALLY honest with where I needed to improve. It’s very hard to find a leader who has all of the things to run a non-profit. I’m a pretty good Executive Director but I know I’ve become a better one because I’ve invested in my team.”

Create space to talk about succession

“I would recommend building a clear governance policy related to succession planning. It’s something Boards and EDs need to get totally comfortable with, it’s just part of doing business, to be ready for transitions. It’s always important to have an ‘in-camera’ session directly with the Board and the Executive Director at the end of every Board meeting, as this is one place to discuss transition issues, among other sensitive or confidential topics. If an in-camera happens at every board meeting it isn’t alarming but just protocol even if there is nothing to talk about.”

Make space for the new leader

An incoming leader reflected on what it takes to make a successful transition, “The incoming leader needs to establish respect amongst the team. It helps if the former leader makes the space for the new leader by using their influence to be the catalyst to instill confidence in the new leader. The board is similar. The boards support is vital to new leadership. It’s like being in a marriage and watching your partner walk with somebody else. These things are so human and so raw, and even the strongest person, to transfer the praise and respect to someone else is extremely difficult. We need to transfer the proper authority and support to new incoming leadership to support the future success of the organization.”

Be a role model in your departure

“It’s a full body sport, it’s a contact sport being in the Executive Director role. When I know I’m leaving I recognize there is going to be an end and gradually de-invest, and help others to step up. Sometimes it’s another staff member or board member. I encourage staff members to do things I would have done in the past. The idea of bringing people in so I can role model departure, making clear I’m not indispensable to the last nanosecond. Part of the commitment to the organization is to support its readiness to not have me there. As you are supporting the organization you are supporting yourself. To help them not need you, you need to get over it. I’m not going to see how that big project I was so invested in plays out, I’m going to get over it and trust the right next things will happen. You fill in that gap with the new direction you’re going. You’re easing up a bit as you tilt towards your next chapter. Your gaze starts to shift to whatever is next while still keeping an eye on your previous organization, celebrating its successes and the great people who are ready to lead it into the future.”

Lead by example

“It is important to be clear on what success looks like and what your strategy is. Lead by example, with the right language and treat people with respect. Whatever you say is louder and more visible. When you come in the morning if you go to your office and shut the door because you have an urgent email, everyone’s going to be noticing that. It would be more effective to have a conversation with people first. Ultimately you should be authentic and not pretend that you know everything. I tried to hire people for the organization that can complement my strengths and be honest with me. We work together in collaborative ways. You don’t need to be master of all things but you need to have a strategic vision and hold people accountable. You need to get comfortable having difficult conversations. If you don’t, staff won’t respect you and you’ll be ineffective as a leader.”

Build credibility and make tough decisions

“I built strong credibility with the team and the board. This built trust that I was being thoughtful with the team. The board perceived the care I was putting into things. The driving force of my life is a sense of inclusion. I subscribe to a strong compass around kindness, I try to be as kind as I can all the time. Every moment in your day has an impact on another human being. You never know how significant or insignificant it can be. It was very much my own human approach. Even when people are being unkind to me, I try to respond with kindness. I knew I had to be that person in this situation. I just had to be kind, deciding to be more forceful in other things was defending the outcomes of the organization.”

Nurture the board chair and Executive Director relationship

“One of the things to focus on is the Executive Director to board chair relationship. There is no one way for this. I haven’t seen one perfect way. It is best when you’re both explicit about it. What’s the right way? How often should I meet the board chair? Each organization is at a different stage with this. Make sure you don’t assume that the way they did it with the last Executive Director is the way it will continue. You need to start a fresh new relationship.

I would have a coffee with every board member when I onboarded to learn about what’s important to them, to build the relationship. Identify a frequency of meetings with the board chair that is frequent enough that you feel you are going to be on track and supported. You need to be clear on what the board’s expectations are. Get yourself enough contact that you’ll go into your first board meeting with your eyes open. I think new Executive Directors may not know how much they can drive with the board. You don’t have to wait for the board to drive you on it. You can say, ‘It would be really important to me to meet every two weeks when I get started’, with the board chair. New Executive Directors can have permission to have that conversation and not wait for it. Not to be nervous, own it. Own what you need for the first phase and recognize what you need could change.”

Plan your first 90 days

“The first 90 days helped me establish my first few weeks on the job. I also thought about what I did NOT need to focus on. This critical period really sets the tone for what you’ll need to prepare for this new role. I adopted techniques and approaches that were relevant. I even handed my plan to the new Executive Director after I left.”

Listen, listen, listen!

“Don’t go in and make major changes in the first six months unless you were hired on a major change management agenda. Go in and listen, learn and assess. Seek first to understand where the organization’s strengths are. Plan ahead when you have gained the trust to be credible in trying to make changes based on data collection and based on your assessment of what you’ve been seeing, hearing and experiencing. Unless you are hired to ‘clean house’ and chart a new path, don’t go in and make changes in the first six months. You are going to break down relationships before you even build them. It shows a lack of respect. Success in charitable leadership is all about relationships, and relationships are rooted in trust. You need to earn that trust (from staff and partners) especially when taking over from a founder. It’s not about trying to prove you can do something or fix things when they don’t need to be fixed. You need data. You need vision. Ask a lot of questions and listen, listen, listen. In my situation, knowledge transfer didn’t happen because the new Executive Director treated the team with so much disrespect that one of the key people quit and refused to transfer knowledge.”

Transfer knowledge, don't teach competencies

"It's a knowledge transfer. You're transferring your institutional knowledge, you're not teaching me competencies. Historical context is needed, not future strategy. I need to know everything in the past that might affect the future. Be honest about culture and team dynamics and what isn't working. It was really "rose coloured" in terms of culture but the teams were actually very unhealthy."

Reframe challenging situations as opportunities to learn

"Confidence comes from the small wins. In my mind when I need to go through something that's very challenging, those small wins become stepping stones. As a child and as an adult we learn coping skills. When I get through big hurdles I am that much stronger. When something happens, instead of saying 'Oh no! How can I get through this?', I say, 'I wonder why this is happening and what I can learn in this moment'. I'm curious how this is going to end up, I'm going to pay close attention to see how this unfolds so the next time this happens I'll know what to do. If I approach this as it's purposeful instead of chaotic or random, then I believe I have the skills and resources to get through them."

Create a strong succession plan

"Having the board and the outgoing Executive Director create a really strong succession plan is so critical. I can't overstate how important that is. This shapes what the new Executive Director will experience, especially in that first year."

Know your role

"I indicated I did not want to stay on the board because I thought it would be unfair to the new Executive Director, I felt I would always come with the lens 'here is what I would do or here is what I did do and it worked'. I wanted to stay as an external advisor, "I'm here any time you need me." But they need to be smart enough to understand how valuable that expertise is."

Update your job description

"Having an up to date job description for Executive Director is important too. In past roles I worked really hard to build an up to date job description to have approved by the board. At first, you usually just have the posting that you're hired with, but over time it's clear the job has grown, evolved and needs a clearer framework that captures the full range of the role. I realized how important it is that the board should actually know what I do, what's involved in and required of the role, as many board directors are unfamiliar with the real work of an ED. Recognizing that if I'm going to be measured for my performance, this is another tool in that process. I've always also developed annual goals that were confirmed with the Board, and these can be contexted with the actual job description. The reason I think it's important is that if it's up to date, then it is actually ready for the next succession process. It's a succession tool."

First, Do I have a job description? Is the Board familiar with it? How current is the board with what I actually do, given that I'm their only employee? I'm at a place in my career that I have a little bit more to look back on. You realize that in effect, every time the board is together it's your performance review. You could look at it in the negative, they have the potential to fire you (or, give you a bonus!). What are they going to do, fire me? I'm okay with this realization, because I know how I'm doing my job."

Consider an interim phase

"I've been in four different CEO roles. I gave an eight-month notice to the Board in one case and six months in another. I had complete investment in each organization and wanted to ensure an effective transition. In one role, there was a milestone event I was aiming towards and that would be the capstone of what I led over the previous years. I decided to leave after that. There are challenges to that length of notice period however, and I don't think it's wise to provide that much time. I was trying to balance a number of things, the needs of the organization as well as my own personal needs. I like to start with who are the emerging leaders in the organization? It's rare that you can just do a handover without some kind of interim phase. The interim phase can often be handled by someone from the senior team as an amazing leadership development opportunity. This gives them a chance to get behind the curtain. This could be something like a three-month interim role while the Board conducts its search process. The right time for transition is likely less than six but probably at least three months, depending on the nature and complexity of the work, the relationship with the Board, and the leaders-in-waiting.

In another example, the Board kept asking me, 'Can you extend?' after I had given significant notice. I let them know I would be happy to support a few key pieces, and provide a certain number of hours as a consultant and report to an interim Executive Director, providing the right distance from the Board and support the organization to fully work through its transition. The interim Executive Director should be the one leading the work. I was very comfortable with the idea of being a consultant with clear parameters, serving as a resource to that interim leader, but also clearly indicating that it would be work that would be invoiced. We built a contract that laid this out, and it was an excellent solution for all of us."

Build a passionate and competent team

"What's been the saving grace for me has been getting people who are passionate but also competent. The team is what has driven this. My team was always honest with me and I encouraged that type of honesty. I had very capable people and that made all the difference. I knew it would get done well and all I had to do was delegate. I never felt like 'Wow this is all on me.' Knowing you have a team you can rely on makes all the difference."

Rely on expertise of staff

“There is tremendous value that staff have in transitions. There is a huge amount of expertise there to be mined. Transitions are difficult for staff. How can we rely on the expertise of staff in a way that can help and support the transition? We need to help staff feel safe and valued. They are going through a lot of emotions during transition.

How can staff feel significant in terms of their feedback in ensuring the successful transition plan? There is an enormous amount of institutional memory – and it lies with them. The board needs to acknowledge that this is going to be an enormous transition for staff. Staff need to be a fundamental part of a successful transition plan. If staff aren’t heard and supported in the transition, something is missing and the organization will suffer.”

Focus on relationships

“Leadership is about relationships. The new leader coming in and establishing positive relationships with staff, the board’s relationship with the founder, the board’s relationship with the new Executive Director, the new Executive Director’s relationships with external stakeholders. It’s all about relationships. I personally introduced the new Executive Director to all of our funders before I left to set them up for success and “pass the torch”. Funding is about relationships and the lifeblood of the organization is around funding. If the new Executive Director cannot nurture and evolve relationships to translate them into new resources, they - and the organization - will be in jeopardy.”

Find mentors and free resources

“Find friends. Find people who are where you want to be and ask them for a coffee. Ask them if you can meet with them. Value their time. Have questions that you want to ask. Know that people actually don’t have time. Seek out the free education resources. I can’t tell you how many webinars, articles and free resources are online. I just scour the internet for things. Take advantage of free resources.”

IF I COULD WAVE A MAGIC WAND

We asked participants to dream what they might do differently if they could go back in time. “If you had a magic wand, what would you do differently in your transition?”

I would have trusted my instincts

“I would have trusted my own instincts more. We had three crises around cash flow. In the first one I listened to the founder a lot. I was trying to appease the relationship with them and I sacrificed my own decision making. At the point when I realized how tight the numbers were I should have deferred one program and cancelled another one, instead we ran both. That was not just a singular circumstance. I wish I dug more with our staff about finances. I would have learned earlier on that there was always this mass firing and mass hiring if I asked more questions.”

I would be more confident and patient

“I wish I was more confident in making operational decisions and not approaching the board for permission on almost every decision. I would have been more patient, using my authority within my position to make certain decisions, and at least take an extra day before making these big decisions.”

I would get a more accurate snapshot before stepping into the role

“I would have wanted the board to hire a consultant who is a non-bias third party and do an organizational overview and audit of finances, team, SWOT analysis, and put together an ACCURATE picture of where the organization is at. I would hand the incoming Executive Director a book of the current state of the organization.”

I would share the weight

“If I did it again I would have approached it with less attachment to the process and outcome. With less about me, and my vision, but how we are all a part of the project and idea building. Everyone is holding the idea and has a responsibility to carry their given weight. It’s much heavier to carry the idea and the entire weight of the project by myself. If you’re able to bring people to support you, it’s so much easier.”

I would have a robust recruitment process

“I would have improved the recruitment processes to allow top candidates for the job to get a chance to interview the staff. I wished there was a clearly defined lines and roles throughout the recruitment processes done by an Executive committee or HR committee as part of the board. The founder should not lead recruitment. They can be part of it if managed correctly. The founder shouldn’t be sourcing, recruiting, or making a job offer. I wished there was stronger oversight of the founder by the board. The role of the board chair should be amplified during the transition. The board should lead the recruitment process. It would be great if the transition plan was even in the contract.”

I would job shadow to help with knowledge transfer

A founder reflected on their transition, “After a lot of reflection, if I could have cleaned the slate and done it differently I think I would have suggested to the board that we hire an Executive Director with a shadowing period. That they actually job shadow with the Executive Director before getting started. Or that they are hired on a three-month contract with a different title to work side by side the ED before they actually take over the reins. There needs to be institutional knowledge transfer, especially when there is a founder. You can’t squeeze that knowledge into a document or into a book - it is often a “way of being” or a “way of leading” that has facilitated success for the organization. The new leader needs to at least see that in action and understand it, not necessarily replicate it. If they ignore it, challenges will lie ahead. Founder succession is unique. So much of my organization was me. I didn’t even know where that line was as a founder! The knowledge needs to be transferred through working together. It’s walking it, living it and breathing it next to the founder. It is learning through osmosis.”

I would get a business management degree

A first time Executive Director shared, “I would get a business management degree to understand the foundations of HR, organizational management, essential skills in fundraising, and a deeper understanding of equity and anti-oppression. My lived experienced is not enough. I think I could be stronger in championing it in theory and practice. I would love to have had that exposure a little more beyond my experience of a person of colour and Muslim.”

I would have a clear role for the founder

“The ideal founder involvement would have been to separate jurisdiction of operations versus philosophy of mission and vision. What I needed was not to learn operationally from the former leader, but I did need to learn mission, vision, philosophy, history, every breath that happened in the founding story, the barriers, how they overcame them. Because the operational piece interfered with the relationship. The relationship became destructive. I do need to do a lot of learning but on the historical mission side, not on operations. I would have wanted a founder to share everything they’ve embodied.

The most important role of a founder is actually one of honour. There is power in the founding story. Any time you create something in life there is power in how that happened. They didn’t just have an idea but they actually executed and sustained. Someone who creates something and does it, that is a truly special human. All of the humans who have done this deserve to be honoured.”

FRAMEWORKS

Throughout the conversations several strategies and frameworks were identified for how Executive Directors could tackle long time transitions. I also added a few frameworks I was inspired to create since conducting these interviews.

Build your ‘four point’ support structure

“It was having a really supportive network of multiple points. Especially when you are in crisis. It’s vital to surround yourself with a team that you really profoundly trust and you know they believe in you. When you hit the bottom you need that support network.

For me it was a four-point system of support:

- 1) Team: I got to the point with the team where they said ‘we need you’.
- 2) Mentors: Mentors with way more experience than you have to provide perspective.
- 3) Personal support: You need somebody in your personal life who can empathise and be there for you in the right ways.
- 4) Board Chair and Board: You need the right board or at least a strong board chair. I started out with the wrong board and the right chair. We worked together to build the attrition that we needed.”

Focus on buckets

A leader with more than 20 years of experience in 3 different Executive Director roles reflected on advice they would give to emerging Executive Directors, “I would think about buckets. Make sure you have enough time for each bucket.

The buckets I recommend focusing on are:

- 1) Team,
- 2) Board,
- 3) Programs,
- 4) Funding and Partners

You need to make enough time for each bucket. For your team and operations make sure you’re connecting enough around engagement and culture. Be involved with people. At the same time, you need a bucket about the board. Make sure they get the essence and stay at the right spot. Build out a strategy about who is on the board. Sometimes people don’t spend enough time on board recruitment and development. In the board bucket is also strategy. You have to be close enough to the program that you can be authentic and vivid when you talk about it. Another bucket is funders, partners and stakeholders. You can’t just sit at your desk with your door closed. You have to be outside talking enough with stakeholders so insights hit you, connections happen, and you can deepen the work by understanding the trends and issues out there. You have to be building relationships enough so that you can activate partnerships and keep evolving the organization.”

Create 'Red, yellow, green', board alliance chart for 'managing up'

One Executive Director shared their process managing up to their board, "When you're negotiating the job you better make sure you have the 'right' board chair or that they can become the right person. The right board chair can build rapport and trust that they can become a powerhouse. I had a 'board alliance chart' with a red, yellow and green with timeframes of engagement and strategy. I looked at every person and made it my goal within ten weeks to flip every board member to be trusting me. Figure out who is in the red, who is the green, and who is in the yellow. The green was relationship building, this is where I spent most of my time because I bolstered the champions. The red was all credibility building focusing on reports, engagement, showing them and due diligence. The yellow was easiest because they kind of buy in but you engage them with reds and greens. Eventually you try to turn everyone green. A few months later I re-evaluated water and anyone who was still in red I worked with my board chair to let the 'reds' go once I had built the board chair's trust. My board chair didn't know this system existed. My board chair didn't know this system existed, but it facilitated a strategic process for us."

Evaluate what you're stepping into

"I would start by getting answers to some key questions during recruitment. Tell me about the governance structure. Tell me about the strategic issues the organization is facing. Ask if the board knows the answer to these questions too. Ask to see the financials to understand what financial footing it's on. In a past role, I lost more than twenty weekends per year on bad governance. So many meetings, retreats, events. Does the Executive Director have operational leadership or is it stuck in governance nightmares across national boards? For me, the idea of having just one board mattered. How often do boards meet? My last organization was quarterly and held meetings during the workday. Understanding how the board is governed and if the board understands its strategic issues are essential pieces for understanding how they will see the ED role.

Is the staff looking forward to change? How big is the problem you are being asked to solve? Are people leaning into it with excitement or are they so resistant they can't believe it's happening? Understand why the other person left. What are the expectations that are hidden? You can't ask this directly but it can be uncovered. Ask a few turnover questions on the operations side. What has staff turnover been like? How is staff culture? If it's not a good fit I'm not afraid to step aside and say, 'Okay, good luck with that'."

At one organization, I asked everyone the same four questions during my onboarding:

- 1) Tell me what you like about the organization?
- 2) Tell me the things you would never want to change?

- 3) Toot your own horn, tell me the awesome things you do.
- 4) What advice would you give a new Executive Director?

It was through these conversations that I caught a few themes and brought them back to the board, helping to shape planning for the first months. It was about finding the common themes that don't make sense, at all levels of the organization. If you know you're going into a tough situation you can start by creating a report to the board of what you believe is actually going wrong. They don't know what they don't know. As a starting point, it's helpful to unpack the operations through staff and Board interviews and other forms of data, getting the real numbers. Bringing what you learn back to the board. Here is what I've discovered and here are my top priorities to go forward. That can give permission to name some of the difficult realities you discovered, that have nothing to do with you – it's what you're inheriting. It's not on you then, this pre-existed before I got here. This is the crap that landed, the first two things I can do about that crap is this. This helps you not get thrown under the bus from inheriting stuff that may need multiple strategies, not just you, to fix.”

Build a realistic runway for success

“When you have an opportunity to work towards a planned departure it takes time to create the smoothest possible runway between outgoing and incoming Executive Directors. A realistic runway is a situation that is manageable for the new Executive Director to build from intentionally put in place by former leadership, and the board. This runway is different for every transition. What is realistic given the unique characteristics of your transition? Some strengths are available, some can be added by the previous Executive Director or Board and some just aren't possible. The key challenge is to set up the incoming Executive Director for success by giving them the best possible runway to join the team from fundraising reserves to team culture to transfer of relationships to available data to do their job. It is important to temper expectations in relation to the runway you give to the new Executive Director and even ensuring they are paid a decent wage to do so. Otherwise Boards may be setting up Executive Directors for failure by setting up impossible jobs with unrealistic expectations that do not match candidate's capacity. If the runway is too long it likely also won't be used. It's about creating the right size runway so they next leader can take off.”

Transition through intentional steps

“Create an open culture to talk about transitions before you are considering your own. Remove the taboo nature of this discussion amongst your team and especially with your board. We all leave someday so it shouldn't feel like a threat when you start talking about your transition. Build your transition in steps, what knowledge will you transfer, relationships will you share and accountabilities will you migrate before you leave. Don't do it all at once as we call it the unintended “transition cliff”. Take small steps consciously and communicate them internally and externally. Baking succession steps

into your organization does not mean you are planning to leave it just means that if you did have to leave the organization you work for would have a foundation to fall into.”

Steps to consider for board, Executive Director and staff ...

- Create a clear job description for all staff and Executive Director
- Keep up-to-date performance reviews for all staff and Executive Director
- Build a healthy revenue pipeline with continuously updated prospects
- Build a fundraising reserve of at least 3-4 months of annual revenue
- Securely store up to date records (electronic and physical)
- Build processes and policies for finance, HR, programs, board and fundraising
- Build efficient governance models (not too cumbersome or too loose)
- Build empowered team culture with clear accountabilities
- Empower a diverse board of directors who are informed & trained in governance
- Ensure you have in place appropriate financial controls
- Build automated reporting systems for internal and external stakeholders (For program impact, accounting, fund development, and all relevant metrics)
- **Come up with your own ideas!**

Steps to consider for board of directors ...

- Transition timeline with key milestones and who is involved at each stage
- Clear roles / responsibilities at each stage of the process: roles of board chair, board of directors, recruitment committee, recruiter, former Executive Director, incoming Executive Director, current staff, volunteers and all other stakeholders
- Recruitment process for new Executive Director (Will you use a recruiter?)
- Decide on main point of contact to current Executive Director throughout process (Board chair? Recruitment committee chair? Other?)
- Confirm internal and external communications messaging, roles and timeline
- Decide how the former Executive Director will be involved before and during transition with clear boundaries in all areas: recruitment, interviews, selection, onboarding, knowledge transfer, communication, etc
- Decide if / how the former Executive Director will be involved after the transition
- Create onboarding for first 100 days on the job for incoming Executive Director
- **Come up with your own ideas!**

REASONS LEADERS LEAVE

There's a whole world out there

After being at their organization for over 20 years an Executive Director reflected, “Although it happened quickly, the field for transition was very fertile. I felt along my career journey I wanted to have another challenge and opportunity to contribute to community in a different way. I had made the decision I didn't want to retire there. I'd been there for so long, I wanted to create space for someone else to come in to help take it to the next level. Then an opportunity came up. I had to conquer my fear. If I stayed it would have been because of fear. It's so easy to wrap yourself in routine and something that's familiar. There's a lot of comfort in that, but it can really hold you back. It helped me in terms of my personal identity and how I saw myself. I wanted to have no regrets and be proud of myself. I needed to be brave and explore what's possible. It's like how I view travelling. There's a whole world out there. Now I try to avoid going to places I've been and explore new places. This makes me feel awake, alive, and growing. If your natural tendency is a homebody, then you can feel great pride in exploring new environments.”

I wanted a new challenge

“I didn't want it to be the last leg in my career, I wanted to lead an organization that was already established and take it to the next level. I wanted a different leadership challenge. It was a personal quest for growth and leadership development that was driving me to move to a larger organization. There was no incident, it wasn't about the money, there was no power struggle. I think I would have hit my leadership ceiling if I had stayed.”

'Right' reasons

“Have a conversation with yourself and make sure you're leaving for the right reasons and you know what those reasons are and it's not because you had a bad day. It should never be impulsive. You need to think of yourself and the organization. Sometimes an organization needs somebody else. Sometimes you personally need to have a different experience so you can be proud of yourself and that you're moving along in your career. Be very careful where you go. Sometimes you can't control that because it's hard to find a job. New jobs are a significant adjustment. The fear of going shouldn't be the reason why you don't go. Emotions can give you some clues. Are you afraid to go? Are you afraid to even think about it? Some people operate on impulses and you don't want to have regrets. When you leave you look for more evidence to support the decision. If you gave birth to an organization it is going to be different than somebody who inherited an organization. I really felt like I was one of the creators.”

A founder's journey

“Running my own show is very different than running somebody else’s. It’s different running an organization you didn’t start. Now I’ve done both. The biggest difference is it is not in my veins. I don’t care any less. I don’t work with any less passion because I chose well in terms of my next role. I think I put in just as much effort in both jobs, but I have an identity beyond my work now – that’s the very big difference. Whereas I think my identity was completely wrapped up in my work when I was leading an organization that I founded. There was no distinction between the role and me. My work is a major part of my life and that will never change but it is different. Dramatically different. I miss the organization I founded, but I do not regret any of it. The average person really has no idea what it takes to do establish and successfully grow an organization from grassroots. The skill sets that are required to birth and grow an organization are different than the skill set to take it over successfully. Not less valuable, just different. But Boards have an enormous responsibility and challenge in selection the appropriate person, leveraging the expertise of the founder and leading a smooth and successful transition. It is not easy. And it is not always successful – in fact it fails more often than it succeeds. Boards need to manage this situation strategically and skillfully. Even though I was going through enormous personal challenges through the transition, I couldn’t tell my family. They couldn’t relate to what I was going through. It was like losing a part of me – even though I chose to exit.”

Looking for support? Reach out!

If you'd like to host a succession workshop or discuss your own organization's transition feel free to get in touch with us at EPIC Leadership Support at info@piecez.ca or www.epicleadership.ca We offer coaching and consulting for organizations and individuals going through long time leadership transitions.

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