

## Five Essential Facts for Weathering a Change in Leadership

Third Sector New England's *Executive Transitions Program* managers Heather Harker and Hez Norton tell you what to expect when your executive director says she or he is leaving.

You're the board chair of a medium-sized non-profit organization, and your much-respected executive director of 15 years has just told you she or he plans to retire in 3 months.

Prepare yourself for a major transition that should include much, much more than a well-executed search for her or his replacement.

Knowing 5 essential facts will guide you through a successful and forward-moving change in non-profit leadership.

### Preparing for Change

1. **Your organization will change, too.** You are at a pivotal moment. Depending on your next steps, the nonprofit may falter, may miss a valuable opportunity – or may emerge a *stronger, more vital* operation.

**TIP: Counsel your board and staff that this is more than a staff change. Both will need to be engaged for the transition to be successful.**

2. **A change in leadership entails three phases, all of which are significant:**
  - **Phase I** - Conduct a positive farewell experience for all stakeholders.
  - **Phase II** – Launch the search and simultaneously use the opportunity presented by the search phase to reflect on the organization's goals and mission, and consider what needs to be changed for new leadership.
  - **Phase III** - Ensure the successful transition of the new executive director.

**TIP: Be prepared to treat each phase with care and attention.**

3. **Consider your interim leadership structure.** Engage others in answering:
  - How long will it be before we hire a new executive director?
  - Do we expect to make personnel and policy changes during that period?
  - Will there be internal candidates?
  - Should we hire an outside interim executive director (interim ED)?
  - If we hire an interim ED, what board/coaching support must be in place?

**TIP: Expect an outside interim executive director to work between 20 to 30 hours per week, for an average of 6-9 months. Hire someone with past experience as an executive director and who clearly understands the special role and parameters of being an interim, not permanent, director.**

4. **A search is much more than an ad in the newspaper.** You have a remarkable opportunity to plan the next stage of the organization's development. Your non-profit organization should revisit

and restate its goals and mission (see Phase II above), and determine the type of leadership that will take you where you want to go next.

An appropriate search has several fixed steps. These steps include:

- Establishing a transition committee
- Describing future leadership needs and writing a job description to match
- Guaranteeing a broad pool of candidates who offer cultural competence and diversity as well as management skills - this is critical to the search process
- And, of course, interviewing and making the job offer

**TIP: Consider hiring a professional transition consultant to facilitate the process.**

5. **Don't just throw your new leader into the fray.** Just as you thoughtfully said goodbye to your departing executive director, you want to ensure a successful transition for your new one. You will want to develop a comprehensive plan for the new executive director, which includes:

- An introduction to board members, staff, volunteers, major funders and other stakeholders
- A thorough orientation that outlines the history of the organization, governance policies and issues, a complete description and assessment of current (and anticipated) programs, the fiscal health of your nonprofit, the current and projected fund-raising picture, and issues specific to your organization
- Opportunities for mentorship

**TIP: Prepare a written plan in advance to orient your new executive director**

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