



ROOTED IN VALUES.
DRIVEN BY EXCELLENCE.

Transitioning in a New Leader

By: Jane Mack, MS – ODL



The process of preparing for a new leader in a nonprofit organization can be exhausting. The search and hire process alone can tax a board's energy, let alone the other preparations that may precede the search process such as strategic planning, a board self-evaluation, and organizational assessment. Once the former leader has departed, the new leader is in place, and all of the recognition and celebration events are over, it is understandable for a board to want to relax and rejuvenate. However, this time of "transition in" is a critical period in setting the stage for success and should receive as much attention and intention as the previous work.

Early in the hiring or transition process, the board and new leader need to clarify priorities, their respective roles and responsibilities, how they will work together, and the method and metrics that will be used to monitor and evaluate the performance of the new leader. It is also suggested that including a discussion about why the new leader was chosen, and why they said yes provides an opportunity for open communication and managing expectations. Following is a suggested model for use during the first year of a new leader's tenure. This model can be modified based on the individual circumstances of an organization.



ROOTED IN VALUES.
DRIVEN BY EXCELLENCE.

Use of a Transition Committee

A Transition Committee (TC) is a time-limited committee of the board that is charged with working closely with the new leader for the first year to serve as a robust feedback loop for ongoing communications regarding performance and challenges. This group can be composed of different board members than those who served on the search committee. There needs to be clear and thorough communication between the full board, the Board Chair and the TC to assure that all are on the same page in terms of organizational priorities, appropriate feedback for the new leader, and communications with various stakeholder groups.

The TC is not intended to serve as a leash on the new leader. Regularly scheduled meetings with the executive are an opportunity for communication, support, and to provide valuable perspective on organizational history and culture. The executive can share what they are seeing as successes and challenges, and the TC can provide their assessment of the same issues. As the executive shares thinking about next steps, members of the TC will be able to identify possible organizational sensitivities that may present barriers to success. The committee may be helpful in supporting the executive as they prioritize changes, especially in areas where there may be particularly high emotions or an exaggerated sense of ownership among stakeholders. These meetings should be viewed as sacred commitments and held as planned no matter how well the transition appears to be progressing. The lack of a formal and sustained process can result in miscommunication and misinterpretation of actions or intent which can quickly derail an otherwise successful transition.

Suggested Schedule for a Transition Committee

The TC should plan to meet with the new executive 30 days after start, then at 90 days, 6 months, and 9 months. A meeting at one year post-hire is a natural time for a first formal performance review. The board should agree in advance who will assume responsibility for preparing and delivering the review – the Board Chair, Executive Committee, TC, or other appointed group.



ROOTED IN VALUES.
DRIVEN BY EXCELLENCE.

In preparation for their new role the executive should be asked to prepare a 90 day entry plan outlining learning goals and relationship-building priorities. Using this information in conjunction with the board's 12-18 month priorities, the executive and TC jointly develop a "Leadership Agenda" that identifies no more than 6 key priorities that are considered crucial for organizational success. This agenda should be shared with and supported by the full board and can be used in communication with staff and other stakeholders as appropriate.

The 30 day meeting is a fairly informal one as the new leader is just beginning to get their bearings in the organization. The leader should share progress on their 90 day entry plan and any adjustments they feel may be needed. The TC weighs in on their impressions of the first month and any thoughts related to suggested changes to the entry plan. While it may be too early to comment on the full Leadership Agenda, the discussions can certainly include any relevant developments.

The three month meeting should include an assessment of completion of the 90 day entry plan and modifications may be suggested for the Leadership Agenda. TC members can share feedback as to how the board is feeling about the transition to date, and answer questions or provide direction or clarification as needed. It is important to remember that the TC is speaking for the full board, thus it is key that the board has discussed as a whole what feedback should be delivered.

At six months a more formal review of performance is appropriate. By this point the leader is usually moving out of the initial honeymoon period and should be developing a presence beyond just that of the 'new' executive. Several board meetings may have occurred allowing opportunity for the board and leader to work together. Employees and stakeholders will have had opportunity to interact and may have given feedback to board members. In advance of this meeting, the full board should have discussed their feelings about the transition and progress on the Leadership Agenda. It is critical that the board reach agreement about the messages to be shared before it is communicated to the executive; as



ROOTED IN VALUES.
DRIVEN BY EXCELLENCE.

with all governance decisions, the board needs to speak with one voice. It is then the role of the TC to communicate the board's appraisal to the executive. A candid discussion of what is working and what may need to change moving forward provides a platform for forward progress.

The nine month meeting is a chance to further discuss the Leadership Agenda and discuss timing and prioritization of changes being considered. The leader should have a fairly clear vision for where they see the organization's future and associated strategic priorities. The TC is in a unique position to provide perspective to the leader as they refine their plans. As with the previous meetings, any feedback or course corrections should be at the direction of the full board, not just the individuals on the TC.

A formal performance review should be conducted 12 months after the executive started. As noted above, the methods and metrics for this evaluation, as well as the identification of who will compile and deliver this assessment should have been decided in advance.

Progress on the Leadership Agenda is an important piece of this process. There should be no surprises in the evaluation, as any significant concerns should have been addressed in previous meetings.

Board Communications

Communication among and from the board during this transition period is a significant factor in the ease or challenge of a leadership transition. The board should make use of executive sessions on a regular basis to discuss their impressions of the transition and address concerns openly and quickly. Board members have a responsibility to share their thoughts and any relevant feedback they have received from stakeholders. Open and honest communication among the board is critical! Board members should pay attention to any niggling feelings that may be developing and bring them to the attention of the full group. There are far too many times board members have kept these feelings to themselves, only to find out later that colleagues may have thought the same thing. If these early clues were a signal of challenges to come, early intervention may have allowed for a different outcome.



ROOTED IN VALUES.
DRIVEN BY EXCELLENCE.

The importance of the board speaking with one voice, both to the executive and other stakeholder groups can not be overemphasized. If conflicting messages begin to emerge, organizational energy is often diverted from mission-focused work to speculation and drama. When people lack the information they need, they begin to make up stories to “fill in the blanks” and these narratives can rapidly develop a life of their own. Clear and timely communication from the board to the executive, staff, clients, and community can prevent this from occurring.

Final Thoughts

Certain organizational dynamics are predictable in leadership transitions. It is important for the board to be aware of these patterns so they can balance what is a natural manifestation of change and what may be an area of concern. Prompt and direct intervention can clarify incorrect assumptions, curtail destructive rumors, and work to build the trust of all concerned.

The identification and support of a new organizational leader is one of the most important responsibilities of a nonprofit board. The transition process has three phases: **Search**; **Transition Out** of the departing leader; and **Transition In** of the new leader. The first two phases are often the most exciting and receive the greatest attention from a board. The Transition In phase is of equal importance, and is critical for ongoing success. Boards must be aware and prepared to fulfill their role through this final phase.

Jane Mack is the President/CEO of Friends Services Alliance, a nonprofit member organization of aging services provider organizations. She has a Master of Science in Organizational Development and Leadership and has done extensive consulting with nonprofit boards.