



# The Nonprofit Whisperer

There is more than one way to conduct an executive transition, but whichever way you choose to do it, you want to make sure that your approach aligns well with your particular organization and its culture. If you are considering an overlap between a departing and an incoming leader, however, a short crossover will usually be the better choice. That way, there is ample time for transference of the departing leader's skills and know-how, but not so much time that the new leader is champing at the bit.

**D**EAR NONPROFIT WHISPERER,  
*I am the decades-long executive director of a very large, identity-based nonprofit organization that plays critical health, well-being, and cultural roles for thousands of members of our community each year. My question is about my planned executive transition three years from now. My staff and board and I are planning carefully and transparently for this departure. We understand there is risk to be managed but also great opportunity for positive organizational change through my transition. One way that we are considering managing the risk is having a year of overlap between my selected successor (be that person internally or externally recruited) and me. Given the size and complexity of our organization and the vast array of relationships that will need to be transferred, we think this is a powerful way to support our new leader in that critical first year. What would you recommend to make this nontraditional approach work for us? How do we mitigate the risks? Thank you for your guidance.*

*Pondering*

Dear Pondering,

It is wonderful that you are taking such a planned and transparent approach to

your transition. If you have not read the growing body of literature on executive transition in the nonprofit sector, I recommend that you do so. The *Nonprofit Quarterly* has published a number of articles on the topic over the years.<sup>1</sup> You might also take the time to reach out to some of the authors of those articles for additional feedback.

Reading William Bridges's seminal book *Managing Transitions: Making the Most of Change* will also give you insight.<sup>2</sup> Bridges writes about creating good endings for departing leaders, and something called "the neutral zone."<sup>3</sup> This is a phase that you, the board, staff, and community will enter when you publicly announce your departure. It is the time that bridges the old and the new. You (and maybe a coach or mentor who can provide a sounding board) must think very carefully about how long you want people to be in the neutral zone.

Your presence will provide comfort and assurances to staff and others, but it may also make it difficult for them to let go. People can feel confused, fearful of change, or impatient for the change to finally happen during this time. You will likely also feel some disorientation—even as prepared as you are—as the time to relinquish leadership draws

closer. Given the emotions (including ambivalence) people feel around transition, the risk for your organization is that a one-year crossover with the new leader may be too long. You may want to consider getting a transition coach to talk this over with you and (if the organization can afford it) outside counsel from an executive transitions consulting firm to help the organization identify the stages of transition it is in along the way and support the pacing that is right for your organization and the new leader.<sup>4</sup> Firms or consultants focused on the executive transitions model will take the time to assess the organization and help identify areas that can be strengthened, while also building shared understanding of the vision and the needs of the organization for the next five years. This would provide a basis for a future-oriented, needs-based leadership profile that may or may not be close to your current job description.

Without knowing the details of your particular organization and its culture, consider a year of transition in which the new leader is in place, but with a shorter crossover (more like three months), and a very sound plan for how to transfer your social capital (introductions to people, networks, and so forth), your technical knowledge about the day-to-day

management, and other knowledge transfer that seems necessary. The new leader will be champing at the bit to get going and begin building rapport with staff, board, and community. A year seems like a long time for a new leader to have to wait to take over fully in this role—and, again, it extends the neutral zone for staff and board. Minimally, they may feel awkward shifting their relationship to the new person, feeling they are leaving you out. At the other end of the spectrum, there could be a lot of confusion about who they should report to or have strategic conversations with, and at what point in time. There are many other reasons to consider a shorter transfer of leadership, but reducing the confused emotional period of the “neutral zone” is primary.

That said, many leaders are departing and taking on a different role with their organization or extending their relationship, but with very clear guidelines for their role, responsibility, and how communications happen.<sup>5</sup> You might consider working with the board to carve out a niche around a special project that places you out of the mix of day-to-day leadership and management, while still contributing to the health of the organization and providing you with the time to manage your own transition and a soft landing. Determine with the board a designated date for letting go of the day-to-day reins and a plan that allows the new leader to have a clear and bright-lined start and you to have a “good ending.” This transition period will grow a new beginning for you, for the new leader, and for the organization—one in which you will not be leading but hopefully contributing in a defined and meaningful way.

#### NOTES

1. See, for example, Jeanne Bell and Tom Adams, “Nonprofit Leadership Transitions

and Organizational Sustainability: An Updated Approach that Changes the Landscape,” *Nonprofit Quarterly* webinar, March 22, 2017, [nonprofitquarterly.org/2017/03/22/nonprofit-leadership-transitions-organizational-sustainability-updated-approach-changes-landscape/](http://nonprofitquarterly.org/2017/03/22/nonprofit-leadership-transitions-organizational-sustainability-updated-approach-changes-landscape/); Ted Ford Webb, “Successful Successions: Executive Transitions that Worked,” *Nonprofit Quarterly*, April 22, 2014, [nonprofitquarterly.org/2014/04/22/successful-successions-executive-transitions-that-worked/](http://nonprofitquarterly.org/2014/04/22/successful-successions-executive-transitions-that-worked/); and the editors, “Letting Go: A Leadership Challenge,” *Nonprofit Quarterly*, July 28, 2017, [nonprofitquarterly.org/2017/07/28/letting-go-a-leadership-challenge/](http://nonprofitquarterly.org/2017/07/28/letting-go-a-leadership-challenge/). See also Tom Adams, *The Evolution of Executive Transition and Allied Practices: A Call for Service Integration* (Oakland, CA: CompassPoint Nonprofit Services and Raffa, P.C., March 2017).

2. William Bridges, *Managing Transitions: Making the Most of Change*, 2nd ed. (Cambridge, MA: Perseus Books Group, 2004).

3. *Ibid.*, 39–56.

4. For example, Raffa Nonprofit Search ([www.raffa.com](http://www.raffa.com)), or TSNE MissionWorks ([www.tsne.org](http://www.tsne.org)).

5. See “New Bridgespan Group Study on Nonprofit Founder Transitions Counters Conventional Wisdom that ‘Clean Break’ Is Best, Demonstrates Benefits of Maintaining Role for Founder,” Bridgespan Group press release, February 15, 2018, [www.bridgespan.org/about-us/for-the-media/new-bridgespan-group-study-on-nonprofit-founder-tr](http://www.bridgespan.org/about-us/for-the-media/new-bridgespan-group-study-on-nonprofit-founder-tr).

**THE NONPROFIT WHISPERER** has over thirty years of experience in the nonprofit sector, serving variously as nonprofit staff and board member, foundation staff member, and nonprofit management consultant.

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