



How to **Think Differently** about **Leadership Transition**



Editors' note: *We are coming up on two decades of sounding an alarm about who will take on the future leadership of nonprofits, but that alarm has not sparked much positive advancement, according to the data. This trio of hard-hitting articles is designed to alert nonprofit leaders to a change agenda—one that aligns the way we develop and choose organizational leaders with meeting our very real sustainability needs as well as our social intentions.*



Reflections on **Executive Leadership** and **Transition Data** over **Fifteen Years**

by Jeanne Bell, Paola Cubías,
and Byron Johnson

If we keep doing the same kinds of succession planning, warn the authors, then “years after this current wave of retirements, we may look up and see that nothing has really changed; that we are still a predominantly white ‘charitable’ sector doing the bare minimum to disrupt the social and political status quo.”

OVER THE COURSE OF FIFTEEN YEARS, CompassPoint Nonprofit Services conducted four national studies of nonprofit executive leadership. The first three reports were called *Daring to Lead*, and were produced in 2001, 2006, and 2011.¹ And then in 2014–15, as part of a multifaceted project to explore our role in the executive transition management (ETM) field, we did another national gathering of data, specifically about executives and their most recent experiences of executive transition.² Each time, we have noted *how little* things are changing with respect to leadership demographics and dynamics—at least in the broad swath of community-based organizations that have been our primary research audience. Over those same fifteen years, the field of nonprofit leadership development (of which we are also a part) has grown extensively as evidenced by the breadth of leadership programs nationally, the emerging prevalence of methodologies such as leadership coaching, and the growing investment by foundations. Taken together, the stagnant data and evolving leadership discourse raise concern about whether as a sector (and as the leadership practitioners serving it) we are moving quickly and intentionally enough toward alignment of our leadership aspirations for the sector with our leadership reality.

In *The Evolution of Executive Transition and Allied Practices*, Tom Adams lays out how the field of ETM has evolved over twenty years of practice and where he and other experts see it going next.³ Adams argues that even as ETM practitioners have strengthened and integrated their approach to organizational consulting—by adding succession and financial sustainability planning, for instance—they nevertheless encounter some seemingly intractable systemic forces: “These challenges—the elephants in the room—include the lack of diversity among nonprofit executives and boards; the bias toward unrealistic leadership expectations; underperforming or challenged boards; and the ongoing struggle to finance an overburdened sector.”⁴

As we improve the way we work with or within individual organizations, we also need to consider

how we can confront and finally overcome these systemic “elephants in the room.” While there are many levers for change, this article looks at the disconnect between what’s happening in most organizations and what the leadership discourse has been for at least ten years now with respect to the potential for leadership itself to change—that is, for fundamentally reconsidering who leads community organizations and how they lead them.

Who Leads?

The Data

Race and Ethnicity of Executives	
Daring to Lead 2001	Executive Transition 2014
75% white	79% white
25% people of color	21% people of color

Graduate Education of Executives	
Daring to Lead 2001	Executive Transition 2014
42% without Masters and/or PhD	40% without Masters and/or PhD
58% with Masters and/or PhD	60% with Masters and/or PhD

The Contradiction in Current Discourse

It has become exceedingly common for leaders, funders, and practitioners to posit that the people impacted directly by an issue should have leadership in defining and solving it. Given the centrality of racism and white supremacy in all social issues, how then can we be satisfied with stagnant representation of people of color in nonprofit leadership over fifteen years? Hire by hire (and board recruit by board recruit), we are keeping the sector predominantly white—demographically, politically, and culturally. If we had really done the work to understand the catastrophic consequences of this from both an equity and organizational impact perspective, we wouldn’t allow it to continue. But we haven’t. We haven’t confronted this elephant in the room: if few people of color want to lead your staff or serve on your board despite the fact that you work in

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We don't know how many fully capable leaders are overlooked by outgoing executives and boards who are looking for the next "heroic leader"—in the last one's mold, only better.

and with communities of color, it is entirely likely that people of color don't see your organization as a place through which to make social change.

Another contradiction exists in our attitude toward graduate education. Given the growing acknowledgment that professionalization of our sector has had significant negative consequences, our practice of favoring candidates with graduate degrees in our selection of executives would seem to be counterproductive. It suggests that many sector actors are simply not motivated to dismantle oppressive structures and systems (what many sum up as the "nonprofit industrial complex"). This is not to say categorically that graduate education is problematic (although some of it may very well be anathema to building equitable organizations and movements for change) but rather gives reason to ask ourselves if favoring graduate education in our selection of executives—and thus encouraging the next generation of leaders to partake in it—really is accelerating the sector's relevance and impact. And more obviously, given its exorbitant cost and consumption of nights and weekends, we should be asking ourselves who is being screened out of the sector's executive roles given this preference?

Where Do Executives Come From?

The Data

Executives Developed Internally	
Daring to Lead 2001	Executive Transition 2014
64% external hires	68% external hires
36% developed from within	32% developed from within

The Contradiction in Current Discourse

The leadership discourse is and has been for years overflowing with talk about preparing for baby boomer retirement, about next-generation leadership, about shared leadership, and so on. So, how can it be that only one in three organizations is capable of developing its own future executive? Or that only one in three at least recognizes the leadership already on its bench? We don't know. We don't know how many fully capable leaders are overlooked by outgoing executives and boards who are looking for the next "heroic leader"—in the last one's mold, only better.

We often hear the argument that small organizations—thus, the bulk of nonprofits—can't develop executives because there aren't enough layers and places to move up through. This is arcane, hierarchical thinking that does a disservice to the sector in so many ways, not least of which is the problem of not retaining millennials. In reality, a small organization offers *more* opportunity to loosen the grip of traditional job descriptions and allow people to grow together and with equal access to the strategic and financial realities of the organization.

How we lead in too many organizations—as though we are little 1950s companies—is actually thwarting internal leadership development. Moreover, not developing our own leaders is a contradiction in that so much of our work as nonprofits is in developing leadership in external milieus, such as communities and movements. For things to change, we have to take the espoused value of internal leadership development and operationalize it, including holding current executives accountable for the bench they nurture throughout their tenure and the organizational structures and cultures they develop to engage everyone in leadership.

Why Aren't Organizations Better Prepared for Transition?

The Data

Incoming Executives' Experience of Transition	
27% describe their transition into the organization as "smooth" or "fairly smooth"	73% describe their transition into the organization as "somewhat challenging" or "very challenging"

Inheriting Significant Financial Challenges		
60% describe the financial state of the organization as "weak" or "in crisis" when they arrived	30% describe the financial state of the organization as "moderately healthy" when they arrived	10% describe the financial state of the organization as "strong" when they arrived

Inheriting Significant Program-Relevance Challenges		
33% describe the programming as "weak" when they arrived	53% describe the programming as "in need of innovation" when they arrived	14% describe the programming as "strong" when they arrived

The Contradiction in Current Discourse

The field of executive transition management has been in the mainstream for twenty years now, with countless articles, books, and guides as well as hundreds of trained practitioners across the country. There is more than ample evidence that following its core tenets, even if outside consulting help is not available or affordable, increases the likelihood of a smooth executive transition. Retention of new executives and board and executive satisfaction are improved when these practices are followed.⁵

But, at a more fundamental level, these data demonstrate how far organizations get off course and how they then look to a new executive—typically from outside the organization—to try to “right the ship.” This pattern, we suspect, only serves to reinforce current leadership demographics and dynamics. If an organization actually needs a “hero” to save it, how likely is it to make major pivots in its thinking about who leads and how? And compounding this, how many potential leaders—especially first-time executives of color, for whom the stakes are extremely high—will stay clear of the opportunity to lead given the inevitably protracted challenge of a “turnaround,” if not the potential outright failure of one?

And finally, one has to wonder if so many organizations would in fact get this far off course if they were practicing and sharing leadership differently. The oft-touted “organizational agility”—the capacity to make constant sense of what’s important and adjust programming, staffing, and financing accordingly—is fostered by distributed leadership, wherein more people than just a management team are doing the sensemaking.⁶ This, too, has been part of the leadership discourse for many years. And yet, too few of us have actually deconstructed our top-down management to empower the diverse sensemakers across our staff, board, and constituency. As such, we are extremely vulnerable to the once-visionary executive who can’t sense the shifting sands fast enough.

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These four studies were similarly conducted but independent (not longitudinal); however, the data—taken in concert with a divergent leadership discourse and the urgency of the political moment—more than gave us pause. It should be of great concern to the sector that who leads and how is not changing fast enough to catalyze the relevance of many nonprofit organizations. And further, that without sectorwide attention paid to the transition of leadership (as regards both the process of leadership and the leaders themselves), years after this current wave of executive retirements we may look up and see that nothing has really changed: that we are still a predominantly white, “charitable” sector doing the bare minimum to disrupt the social and political status quo.

The authors thank the David and Lucile Packard Foundation and the Annie E. Casey Foundation for their generous support of this project.

NOTES

1. The *Daring to Lead* reports were funded by the Agnes and Eugene Meyer Foundation; Rick Moyers of the foundation served as a coauthor, along with Tim Wolfred and Marla Cornelius. Find the reports at daringtolead.org/.
2. These data were collected from 885 executive directors nationally, in partnership with the online magazine *Blue Avocado* and then editor-in-chief Jan Masaoka.
3. Tom Adams, *The Evolution of Executive Transition and Allied Practices: A Call for Service Integration* (Oakland, CA: CompassPoint Nonprofit Services, March 2017), www.raffa.com/successionandsustainability/documents/executivetransitionreport.pdf.
4. Ibid., 23.
5. Ibid., 12.
6. Brian J. Robertson writes about the role of “sensor” in *Holacracy: The New Management System for a Rapidly Changing World* (New York: Henry Holt and Co., 2015), 4–7.

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Blending Succession Planning and Executive Transition: A Successful Case

by Tom Adams

Experts have come to understand that responsible succession planning for most nonprofits requires much more than the question of how to fill the c-suite spot. This new approach involves blending sustainability and transition planning—groundwork that makes the most of a leadership transition and better positions the nonprofit for long-term success.

TWENTY-FIVE YEARS AGO, WHEN AN EXECUTIVE director left a nonprofit, it too often meant a decline in performance—or even going out of business. Today, through supportive investments by national and regional foundations and the development of a practice focused on executive transition, most nonprofits move through times of executive transition without trauma or tragedy. The evolution of this practice and the development of nonprofit succession and sustainability planning are topics covered in a recently published essay (see *The Evolution of Executive Transition and Allied Practices*, 2017).¹ This article offers board leaders and executives a hands-on look at that essay's key points, and focuses on the experience of one organization, and what's different today from twenty-five years ago about the choices boards and executives have when they are faced with imminent or future executive transitions.

While it is tempting to deny it, every leader will transition someday. The approaches listed below offer leaders expanded choices that do the following:

- Transform the fear of executive transition into a proactive, empowering opportunity to increase focus on mission results and the leadership team needed to achieve the desired results.
- Reduce the disruption and risks of executive transition.
- Support organizations where needed in major repositioning or turnaround.
- Make more coherent the emotionally charged transitions of founders and long-tenured executives.
- Expand the culture and practices of leader development, inclusion, and diversity.
- Open the possibility of new approaches to sharing power and leadership.
- Consider more fully the possibility of a new partnership or merger before deciding to hire another executive.
- Address shifts in funding and the political environment, and rethink the connection between mission, strategy, and how the work of the organization is supported.

- Prepare for unplanned and planned transitions through a deeper approach to succession planning.

The case study that follows is intended to provide readers with an example of the power and potential of executive transition and its allied practice. It offers an example of how an organization faced and addressed big shifts in funding, board nervousness about viability and succession, and a potential internal succession where the board was divided in its enthusiasm for it.²

Case Study

Six years ago, Community Builders Southeast faced a turning point.³ Their aging executive director had let the board know he would retire in three years. On paper, the organization was doing well programmatically and breaking even financially in the midst of the recession. Yet the board chair and other executive committee members felt that the organization was drifting and that they needed a more strategic thinker. Three more years with the current executive scared them. These board members envisioned less government money, resulting in major changes in programs, and they doubted that the current executive, though operationally effective, could lead them through such a major change.

Tensions grew. The board chair was a successful business executive and an action-oriented, fix-it guy. The board treasurer longed for leadership like that of the executive who had left ten years earlier. The governance chair, who led a different kind of nonprofit, was getting impatient with the executive of this one.

What's different: Many boards in this situation would either do nothing or overreact and terminate the executive rather than wait three years. This organization chose instead to step back and consider its options before deciding.

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Deciding on Focus

The board was divided about what to do next. Some wanted to do nothing and wait until the executive was ready to leave, and then do a search. The board chair and a few executive committee members felt strongly that to do nothing was to abdicate and accept a status quo that looked okay but was more risky than it appeared. From their corporate experience, succession planning looked like the next action, so they started researching how to do nonprofit succession planning. A review of articles on the topic led them to a firm that offered succession planning for nonprofits.

The approach offered included a replacement review of all management positions, including a review of job descriptions and key functions and roles (sometimes called “unpacking the job”), along with an emergency backup plan for the executive director, chief operating officer, and four other senior managers. The board members would also develop a succession policy and get clear on their preference for internal promotion or an external search for the new executive when the executive transition occurred.

The board chair and executive committee were successful in convincing the board to make this investment. The fact that the board was divided in its opinion about the likelihood of internal succession as well as in its level of confidence in the current executive helped make it clear that outside guidance was needed.

The other complicating factor was the timing of strategic planning and how the organization did that strategic planning. The board chair had enlisted a private sector consultant to help with the strategic plan. This process had been repeated several times, had resulted in a complex set of measurable outcomes, and was understood by long-time board members (but not newer board members or staff).

The board’s concern about reduced government support and decline in services to the community resulted in agreement to include a sustainability review to accompany the succession planning. Once the complexity of the strategic plan was made visible, willingness was heightened for an organizational sustainability review that focused on board and executive leadership, a

strategy/business model, resources (financial and human), and organizational culture.

What’s different: The board proactively decided to use the three years’ informal notice to get ready for transition rather than waiting. The executive director overcame his fear that this process might result in the board deciding to pressure him to leave sooner. The board decided to focus on succession planning in order to be thoughtful about leader continuity and the possibility of internal succession. The succession planning was done with a focus on organizational sustainability—a more recent option particularly relevant to organizations with long-tenured or founder executives, or facing major changes in funding and environment. The board and the executive and management teams embarked on this broader planning process, which looked at strategy more broadly in the context of culture, resources, and leadership. They thereby reexamined their assumptions about organizational sustainability and how they updated their strategic plan. This decision allowed them much-needed time to go deep on these questions and not rush a decision.

Getting Started

Once there was agreement on the broad scope of the work with the consultant, the first focus was learning more about the management team and board. The possibility of a sudden, unexpected transition can be scary to managers and staff, and can result in rumors and unnecessary anxiety. By working with the management team and the executive director together toward understanding how succession planning would be done—and clarifying the roles of the management team and board in the process—some of the anxiety and distractions are reduced. For the management team, first actions included finalizing the questions for an organizational self-assessment to be completed by all staff, and agreeing to complete a worksheet to unpack their jobs.

The board formed a succession and sustainability committee and guided plans for a board self-assessment. The findings from these two surveys were compared to understand board and staff perceptions and alignment/disagreements. These data informed the later discussion on

organizational sustainability and the connection between where the organization was at the time and what was needed going forward.

The unpacking of the management team jobs—key functions and roles, key relationships, and possible backup in an emergency—helped all to better understand the current roles of the CEO, COO, and management team, as well as how they were progressing. The COO quickly let it be known that she was interested in a CEO position at Community Builders or at another organization at some point in the future. The unpacking showed where the CEO (who had been promoted from COO nine years earlier) was still the detail person for the organization. The COO was in many ways more of a strategic thinker and visionary. This insight became helpful as the board began to consider the question of internal succession. Some of the board's anxiety about the pending transition was reduced by learning more about the very talented management team the CEO had put in place.

Succession planning resulted in a written, board-approved emergency backup plan and succession policy for the CEO, and written emergency backup plans and worksheets with leader-development and cross-training plans for all the managers.

What's different: Too often, succession planning is avoided entirely because it can seem uncomfortable for the executive and board. Or, it is done in a check-the-box superficial way by taking a template and filling in some details. Once the fear of succession planning is overcome, it is a very empowering process for both the board and managers. The process makes real everyone's passion for mission by focusing on ensuring that they are preparing the leaders that the organization needs. In this situation, the succession-planning process improved trust and communication between the board and managers, and affirmed the progress in developing internal talent.

Connecting Succession and Organizational Sustainability

Community Builders faced more than the challenge of transitioning its executive and planning for succession. Changes in federal and state funding for its work raised real threats to its long-term

viability. Community leaders on the board could see that their neighborhoods and people served by the organization were at risk if the reductions in public support were not addressed. This concern made it hard to evaluate the internal candidate fairly, because she was associated with the old ways of supporting the organization.

The board and staff survey had asked questions about the four domains of sustainability: leadership, strategy/business model, resources, and culture. The survey data showed that some programs worked better than others both in terms of results and paying for themselves. The sustainability review engaged the management team and board in a process that included:

- Detailed discussion of the survey results and the questions the data raised about the organization;
- A line-of-business (programs) review to better understand the programs, their impact, their funding now and in the future, and their potential for growth (the board decided to ask the COO and her potential internal successor to work with the CEO in organizing and leading this review); and
- A board and management team retreat to discuss sustainability, succession, and the connection to the strategic plan.

Unexpectedly, this process resulted in a shift among the board leaders to unanimous support for the possibility of the COO's becoming the next CEO. This happened largely because of the deeper appreciation the board gained from knowing the managers better and seeing (via the line-of-business review) the strengths of the COO and the key leadership role she already played.

What's different: Community Builders looked at its need for a new executive through the broader lens of adapting its mission to a rapidly changing environment. One of the risks of executive transitions is the board's beginning to think about who the next executive might be before there is clarity about the organization's direction and priorities as well as the competencies and attributes required. Doing so comes from anxiety, and this anxiety is

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Integrating the sustainability review with succession planning allowed the board to gain a much better understanding of the organization, its future, and the leadership team already in place.

normal. We have a vacancy: Who do we know who could fill the position? This approach, however, misses the opportunity for growth and refocusing of organizational impact. Integrating the sustainability review with succession planning allowed the board to gain a much better understanding of the organization, its future, and the leadership team already in place. This resulted in a much more informed decision about whether or not to do an external search and how to shape the succession policy and eventual transition.⁴

The Executive Transition

From the planning described above, the board decided to offer the executive position to the COO on an incremental basis. Eighteen months before the CEO intended to retire, the COO was promoted to president. This promotion included increased involvement and work with the board, and overall responsibility for implementing the strategic plan and reporting organizational results. Based on six-month and one-year performance reviews of the president by the board, the COO was promoted to CEO six months before her predecessor retired. The former CEO became a senior policy advisor (and was also available as requested to the new CEO), and carried out discrete duties as assigned by the COO. (This arrangement is somewhat unique, and it worked because of a long, positive, and trusting relationship between the CEO and COO; typically, this type of overlap is not recommended.)

The board managed the communications about this process throughout to ensure both confidentiality and transparency as appropriate. The new CEO retained an executive coach during the process, and continued those services after she became CEO. The board established an onboarding committee to work closely with the two executives during the overlapping six months, and with the new CEO during her first year. Two years later, the organization has adjusted to the budget changes, expanded the role of a chief development officer, increased private fundraising, and successfully continued to achieve and expand mission results.

During this process, the board chair commented, “When we began planning for our CEO’s retirement, I was really concerned. I knew we

needed to change and wasn’t sure how. This process supported the board and management team in exploring questions we had not been able to address, and making decisions that positioned Community Builders for long-term success.”

What’s different: The board navigated a complex situation and achieved both a good ending with its retiring executive and a great beginning with a new CEO who met their present and future needs.

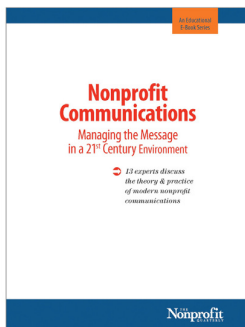
NOTES

1. Tom Adams, *The Evolution of Executive Transition and Allied Practices: A Call for Service Integration* (Oakland, CA: CompassPoint Nonprofit Services, March 2017), www.raffa.com/successionandsustainability/documents/executivetransitionreport.pdf.
2. For additional examples, see Tom Adams, *The Nonprofit Leadership Transition and Development Guide: Proven Paths for Leaders and Organizations* (San Francisco: Jossey-Bass, 2010); Tim Wolfred, *Managing Executive Transitions: A Guide for Nonprofits* (St. Paul: Fieldstone Alliance, 2009); and other articles found at www.raffa.com/successionandsustainability/pages/publicationsandresources.aspx.
3. This case is based on a real situation, with the organization name and industry changed.
4. The 2008–09 recession intensified for the sector the question of organizational sustainability. Most organizations faced funding challenges and the need to operate with fewer resources. Jeanne Bell, Jan Masaoka, and Steve Zimmerman advanced attention to sustainability in 2010 with the book *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*, which helped leaders to look at mission impact and financial viability together. This initial focus was followed by a second book, in 2014, *The Sustainability Mindset: Using the Matrix Map to Make Strategic Decisions*, by Steve Zimmerman and Jeanne Bell. The Foraker Group, the management support organization for Alaska nonprofits, and TransitionGuides (now part of Raffa, P.C.) also developed approaches that broadened the discussion of sustainability beyond mission and finances to include leadership, strategy, and culture.

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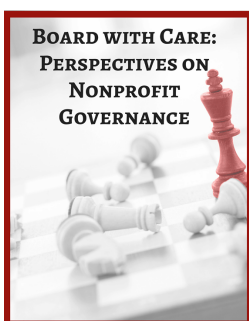
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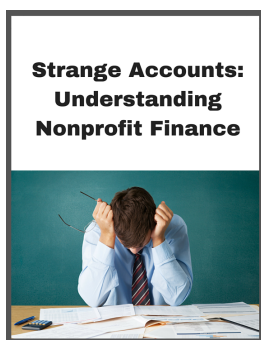
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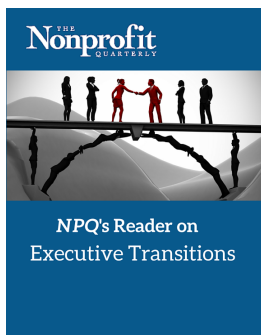
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This reader on nonprofit executive transitions includes almost a decade's worth of well-researched and insightful articles on what can be a difficult and risky moment for many organizations. The sector has been blessed with a small but talented group of thinkers on this topic, and most of them are published here.

Price: \$24.95



Five Insights from Directors Sharing Power

by Jeanne Bell, Paola Cubías,
and Byron Johnson

Far too many leaders bemoan how lonely it is at the top, yet bristle at the suggestion of a codirectorship. But why? When preparing for a leadership transition, we would do well to reflect on what we lose by sticking to traditional practices of leadership and what we stand to gain from being open to alternative frameworks and approaches.

AS PART OF A TWO-YEAR PROJECT TO REFLECT on our role in the field of executive transition management (ETM), CompassPoint Nonprofit Services convened a discussion in August 2016 among five progressive organizations that have formal shared leadership structures. This made sense as part of CompassPoint's reflection process for two reasons: First, we had been exploring alternative structures internally. Second, we had become increasingly concerned about our external practice of ETM—which, in focusing on the search for an organization's next, single leader, was upholding some traditional assumptions and practices of leadership that in the rest of our work we had been questioning for some time. We wanted to understand the motivations, benefits, and challenges the leaders saw in moving away from the traditional, single-executive-director model. The leaders we interviewed and their organizations are as follows:

- Building Movement Project
www.buildingmovement.org
Sean Thomas-Breitfeld and Frances Kunreuther, codirectors
- Community United Against Violence (CUAV)
www.cuav.org
Lidia Salazar and Essex Lorde, codirectors
- Housing Rights Committee of San Francisco
www.hrcsf.org
Fred Sherburn-Zimmer, executive director, and Aileen Joy, administrative director
- Management Assistance Group (MAG)
www.managementassistance.org
Susan Misra and Elissa Sloan Perry, codirectors
- Rockwood Leadership Institute
rockwoodleadership.org
Akaya Windwood and Darlene Nipper, partner leaders

It's important to note that the organizations had differences in how they were unpacking and distributing the single executive role: there were variations on codirectorship, and some were experimenting with even broader committee or collective structures. Despite these differences, there were powerful commonalities across the organizations' motivations and aspirations for

sharing power. It's also important to note that none of the organizations is by any means putting itself forward as expert or as having "figured it out." Rather, we share these reflections to open up a conversation with others who are questioning aspects of traditional leadership and exploring alternative frameworks and approaches.

1. Sharing leadership is an expression of our individual and organizational identities.

Soon into our conversation, we noted that of the ten leaders, nine are people of color, and all identify as queer. Darlene Nipper of Rockwood reflected, "The thing is that we're just different from white guys. We're different people from the folks who have informed the thinking about organizational leadership and management over the last one hundred years. We come at it differently." Susan Misra of MAG put it this way: "I think our innate approach is collaborative and collective. When the organization was thinking about who should be the next leader, it just felt wrong to think of one executive director." Sean Thomas-Breitfeld of Building Movement Project linked shared leadership to feminist theory: "I'm curious if people have thought about the interest and appetite for alternatives to very top-down, hierarchical, one-person-in-charge models as informed by feminism in terms of a world view, but also the organizational theory that might be coming out of that branch of academic research." Others referenced past experiences of traditional leadership that were oppressive. Essex Lorde of CUAV reflected, "That's also part of the motivation—having this bad experience of power." It was clear that, in part, the organizations are experimenting with shared leadership because traditional, hierarchical leadership is not resonant for the individual leaders themselves.

They are also experimenting with shared leadership structures because top-down leadership is in contradiction to the work that they do as organizations. In various ways, each of the organizations

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“It’s not that you are doing less work or that somehow having two people is going to reduce the work. It actually is a lot of work, but the results are exponentially better, in my experience. What we’re able to accomplish together is way more than I believe any one person could accomplish.”

is trying to change the way that people, organizations, and systems relate to one another. They are all concerned with elevating the voices and wisdom of marginalized people and communities. They are all concerned with the conscious, responsible use of power. Given that, they feel a responsibility to structure themselves to the reality they are working toward. Elissa Sloan Perry of MAG put it this way: “We were really, really clear that MAG needed to shift its internal practice behavior and culture to reflect the world that we are contributing to making.” Fred Sherburn-Zimmer of Housing Rights Committee talked about developing a committee-based structure that keeps the decisions with those most involved and impacted by an issue: “While we do all affect each other’s work, it doesn’t make much sense that folks who are not in public housing and working with public housing tenants, or come from public housing, have much say-so over the public housing program.” He added that engaging tenants is their next challenge in sharing leadership system wide: “We have tenant leaders who are not only taking on their own eviction, but are taking on evictions of everyone on their block. These people need to have a part in our decision making, strategy, and vision.” Similarly, CUAV came to the realization that internal leadership composition and structure are directly linked to external impact. According to Lidia Salazar, “We were noticing that our programmatic work wasn’t reaching marginalized communities. So, in our transition, we also changed our mission to center black and brown people, people of color. Then, in turn, it made sense to have a leadership model that reflected this in order to reach these communities and in order to make informed decisions for the organization.” These evolutions of leadership structure are breaking down the false distinction between the organizations’ external organizational identities and their internal practices.

2. Sharing leadership is not only about the individual leaders sharing power; it is also an organization-wide ethos.

Each of the organizations is working to include the voices of all staff in decision making and direction setting for the organization and to adopt practices that deepen equity on all fronts. Susan Misra said, “Shared leadership does really work,

and when it’s working well, it’s not just about the few people who are the codirectors, it’s actually about the whole organization.” Essex Lordes reflected, “Unless you have a certain background or training, oftentimes in organizations you’re not allowed to bring whatever your lived experience is. For us, it’s having a structure that allows people to embody more of their leadership; to be able to bring the fullness of their experience; to bring in that wisdom that we inherently have as oppressed people in different ways and turn that into insight into how we can support the broader community.”

Building equity internally extends to organization-wide practices such as compensation, which most of the groups had lately rethought. As Elissa Sloan Perry described it, “Internally, we are working to get closer to a practice where the highest paid do not make more than three times the lowest paid. We have also created a decision-making guide so that people understand where and how they can make decisions on their own.” Darlene Nipper added, “We, too, have a policy of no one making more than three times anyone else. And there are others besides the codirectors who have lots of decision-making authority. Give lots of different people the opportunity to make decisions [we say] and move me and Akaya out of the center of decision making for lots of the work.” Institutionalizing shared leadership and equity means giving everyone, not just the codirectors, the power to step into their capacity to lead.

3. Sharing leadership is not about less work; in some cases, it may be about more.

For the majority of us, neither the primary motivation nor the result so far of shared leadership is having less work to do. As Darlene Nipper put it, “It’s not that you are doing less work or that somehow having two people is going to reduce the work. It actually is a lot of work, but the results are exponentially better, in my experience. What we’re able to accomplish together is way more than I believe any one person could accomplish.” Interestingly, some codirectors were attempting to split the job into fairly distinct domains, while others have the same job description and work out where they intend to co-decide and where they can act on their own. And co-deciding, of course, can add time to

decision making—a challenge that was raised by some. Sean Thomas-Breitfeld said, “I think among staff under us there is frustration sometimes around the length of time it takes to make decisions that lead to action.” Susan Misra added, “Theoretically, you could have one person do it faster, but I think that Elissa and I are doing it better collectively. It’s not a time-sharing strategy, though I think initially we thought it would be.” Shared leadership can challenge the notion that decision-making efficiency, rather than decision-making quality, is the desired end game.

Though it’s not less work, the leaders spoke to another kind of burden being lessened: the psychological burden of solo positional leadership. Frances Kunreuther, who had led Building Movement Project on her own before joining forces with Sean Thomas-Breitfeld, described the difference this way: “It’s not fewer hours, but it is less pressure and isolation. I can’t even say how different it is. It’s dramatically different, which is a big sustainability issue for me.” And Darlene Nipper said that although she and her codirector consult each other constantly and “partner-lead,” their distinct role clarity “brings me a lot of psychological space to really focus on what I bring to the table in terms of my gifts and attributes for our work.”

4. Sharing leadership requires balancing individual and collective voice.

All agreed that shared leadership requires ongoing attention to the issue of voice. Elissa Sloan Perry asked, “Where do we speak as ourselves individually and where do we speak together? For example, one of the things we have talked about is creating a codirectors e-mail address so that there are things that people cannot attach to just one of us.” Darlene Nipper added, “I think, depending on how we demonstrate and use our voices differently, it can create some fissures—a little bit of different people aligning in different ways. So that just takes a lot of care and attention.” And there is the outside world, of course, that often expects one voice. As Frances Kunreuther said, “Funders can sometimes be a challenge in that they expect to talk with the person they know; I wouldn’t underestimate that.” Clear and frequent communication between the leaders is the foundation for their clarity of voice with others.

5. Sharing leadership is both relational and replicable.

When it came to the question of whether the organizations would continue with shared leadership if one or more of the people currently sharing power were to leave, to a person the folks in variations of the codirector model were clear that the quality of the relationship between them, which often predated their current leadership partnership, was a critical success ingredient. Elissa Sloan Perry said, “Susan and I are pretty clear that one of the things that really makes this work is that we knew and trusted each other pretty deeply before we came into these roles.” Similarly, Darlene Nipper said, “I’d been working with Rockwood as a consultant and trainer for a number of years. Akaya is someone I had gotten close to and really respected.” And Sean Thomas-Breitfeld said, “Frances and I had a very strong relationship, mutual trust, and admiration. I was really looking forward to learning with and from Frances.”

The group grappled with what these stories of close relationship meant for adoption of codirectorship and other shared leadership structures across the nonprofit sector. Sean Thomas-Breitfeld challenged us—and by extension the sector—eloquently: “I’m thinking about how many of us can’t imagine doing this with someone else. How do we reframe that as not a barrier to replicability? How do we instead lift up the virtue of relationship and of incorporating a value of relationship into leadership structures in our organizations? How do we make it a virtuous thing instead of saying, well, if people can’t find the right match, then this model is just this quixotic thing that only applies to a few random POC, queer-led organizations?” That’s a powerful reframe of who leads and how.

We left the conversation inspired to continue with our respective efforts and to stay in dialogue with one another and others wanting and needing something different from organizational leadership—something more closely aligned with our individual and organizational identities.

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