



ONTARIO NONPROFIT NETWORK

# The Leadership Transition Pocket Guide

A handy guide with prompts and questions for leadership transitions and succession planning.



Change is tough. Yet, the nonprofit ecosystem is always evolving, meaning we can't ever be fully prepared for change.

## Do any of these stories sound familiar?



A long-time Executive Director (ED) of a small nonprofit moves to a different sector.



A founding CEO retires after 20 years in leadership.



One or more of a senior leadership team move on within a short period of time.

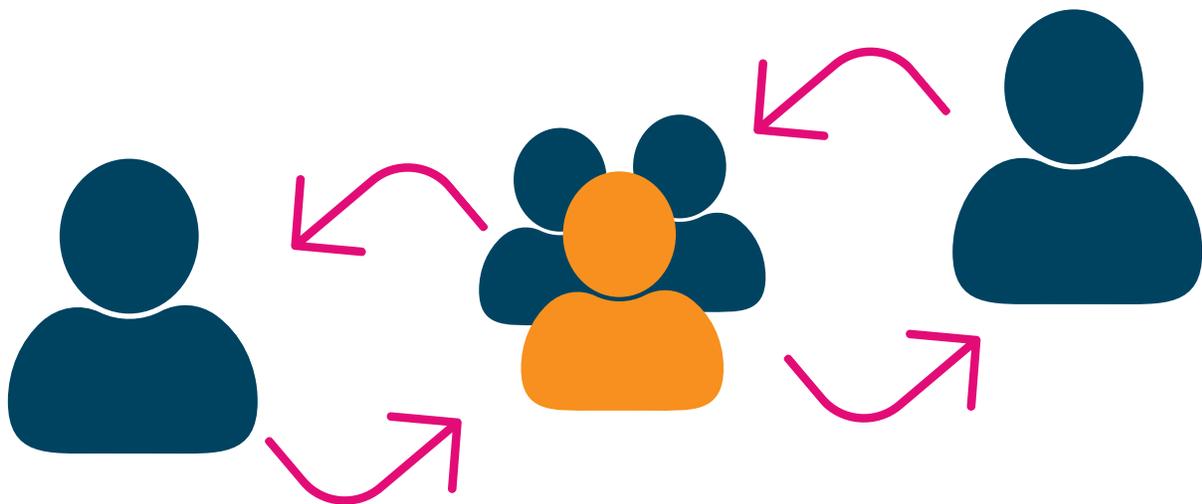


A charity struggles to recruit a new ED, and has interim leadership in place for three years.

All of these are common, yet unique situations. Even if a succession plan is in place, the transition from one leader to another can be fraught with questions, concerns, and issues that emerge over time.

Planning for the next leaders in your organization or sustaining critical roles in your team cannot be done in isolation, but should be embedded in how you work. Hiring, onboarding, and recruitment processes can align with your organization's commitment to [decent work and the advancement of equity](#).

Transition planning is also [part of good governance](#), helping organizations avoid the challenges that can be present due to things like unchecked founders' syndrome, and uneven power dynamics.



But, maybe you find yourself in a situation where you're under-prepared for a sudden change. That's understandable, especially when most nonprofits and charities are grappling with lower resources and capacity, as demand for services and programs only increases.

This Pocket Guide offers some prompts and questions for you to consider, but for a deeper dive you may want to explore [this resource](#) by Tamarack on the human side of workplace transitions.



A change happened suddenly. What should you do next?

1

### **Take a breath and reflect.**

You'll get through this! You may be a board member, a senior leader, an interim leader, a manager – either way, you're facing uncertainty. Let go of the idea that you need to do this alone.

2

### **Check in with your board and team.**

Have open conversations with your board and team about being proactive, and acting with intentionality during leadership transitions, rather than being reactionary. It's an understandable reaction to fall back on what is familiar, especially when the future feels uncertain. Taking time to talk about different possibilities, and alternate approaches to hiring, change management, and leadership in general will benefit the organization in the long-run.

3

### **Focus on what's best for the organization at this time.**

Don't focus on perfection. Focus on what you need at this time. Focus on what you know to be true at this moment. What are the circumstances you're in? Who do you need to bring in for help? What are the critical pieces of work to be done in the near future? Organize this information however it is helpful for you, and make a plan to get you from one point to the next.

If you feel overwhelmed, think about what you can delegate. You may find this [Continuum of Participation resource](#) from our Reimagining Governance Lab useful in thinking about sharing responsibilities.



## How do you embed transition or succession planning into how you work?

One of the biggest challenges in a leadership transition, whether sudden or planned, is the feeling of uncertainty. Even if a great transition plan were in place, the reality is that any person and their unique personality, skill sets, and approaches are irreplaceable.

If we think about leadership as a single person who directs the organization, then we're already at a disadvantage because we're looking for the "right" or "perfect" person. [This mindset needs to shift.](#)



What if we thought of leadership as a shared responsibility, held by multiple people in an organization? This would help the team navigate change more effectively, and it also opens up the possibilities for who can come in to complement the organization's existing team.

**Based on the work your organization does, consider the following questions:**

Is your work cyclical and predictable, or highly reactive and ever-changing?

How much space do you have to be proactive?

How are the roles and responsibilities for managing work distributed across your organization?

How much information is shared, or siloed, amongst your team(s)?

When information and stewardship is more distributed and woven across the organization, the better prepared it is to navigate change and transition.

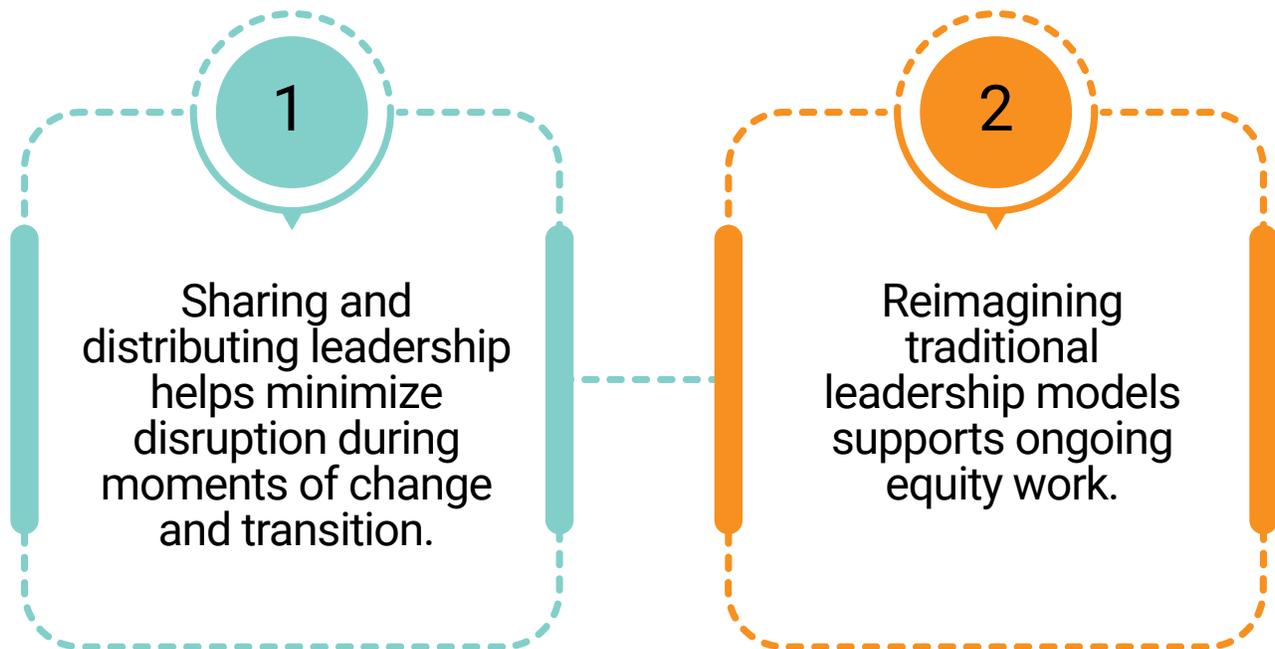


## What can we learn from organizations that are reimagining leadership, to ready our own teams for eventual change?

Some organizations are choosing to distribute leadership responsibilities across the team, so while there is a single leader (e.g. CEO, ED), they are not the only ones responsible for all of the leadership work.

Others are more formally sharing the leadership role through models such as implementing co-Executive Directors or operating as collectives.

**Though there are different approaches to experiment with, there are at least two common threads:**



Check out ONN's [Reimagining Leadership story series](#) for specific examples!

## Reflective questions to discuss within your teams

Here are some conversation-starters you can embed into team meetings, learning opportunities, strategic planning, board meetings, and more!

### Relational:



How can we embed relationships in leadership transition planning?

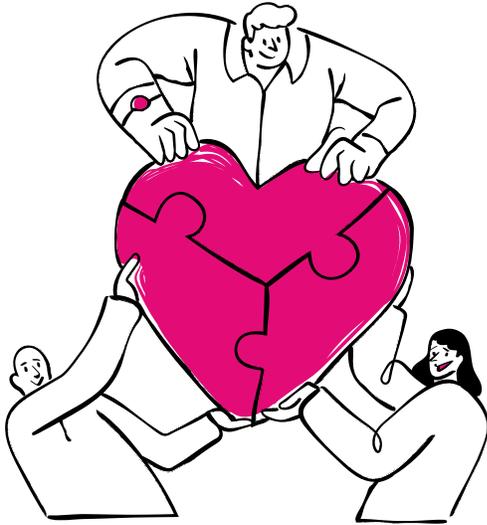
Who will be involved in leadership transition planning? How can we make it a collaborative process that engages team members across the organization?

How does our plan critically examine relationships between organizational staff leaders (executive director, directors, senior management) and the board?

How does our plan critically examine relationships between organizational staff leaders, the board of directors, and the communities we engage?

How does our plan critically examine relationships between nonprofit leaders other than the executive director and funders? For example, do board members or program managers have connections to and relationships with funders, or does one person hold those relationships?

## Values-driven:



How can we root our succession planning in organizational values, vision, and mission?

How can we use this transition planning process as a way to engage in critical reflection around organizational futures?

How does our plan critically examine relationships between organizational staff leaders (executive director, directors, senior management) and the board?

What do our organizational values tell us about what kind of leaders we want to champion within the organization? What impact might these values have on our job description and hiring processes?

## Supportive:



How does our leadership transition plan cultivate and foster internal talent? Are our organizational structures supporting knowledge exchange and mentorship across all teams? Are our organizational structures providing opportunities for training and professional development to potential leaders across the organization?

How does our leadership transition plan build in tangible supports for incoming leaders?

How does our transition plan mitigate the “glass cliff” phenomenon for Black, Indigenous and racialized leaders?

How does our transition plan financially support leaders as they step into these new roles?

Do leaders across the organization have access to peer support networks?