

FOR NONPROFITS

Are there any opportunities currently open for executive transition funding?

No, not at this time. The participants for the pilot cohort were selected in early 2021. However, if you are a nonprofit executive or board member seeking funding or other resources to navigate an anticipated transition, please [complete this survey](#).

What is the status of the pilot executive transition cohort?

Seven organizations were invited to participate in the Pilot Cohort in March 2021. Both executive leaders and their board chairs have been meeting monthly to share their experiences, meet with transition experts, and learn from those who have navigated transitions before them. Funding is being distributed in two phases: Transition Planning grants and Transition Implementation grants. Each organization already received \$25,000 to support transition planning activities and consultant engagements; whereas the amount and timing of Transition Implementation funding will be determined on a case-by-case basis, in response to individual organization's needs.

How were pilot participants selected?

Organizations were nominated by the NSI funders and selected based upon their alignment with the intentions of the pilot to capture a range of transition circumstances. Organizations vary in program area, budget size, departure timeline, and transition type (founder departure, internal candidates, etc.). All participants are based in and serving LA County, have demonstrated a high level of board engagement in the transition, and are anticipating the departure of a long-tenured leader by fall of 2022.

How will the NSI define success for the pilot?

In the short term, the NSI aims to positively impact the stability of organizations experiencing executive transition, making transition resources accessible through referrals and funding. One year after their executive transition, participant organizations aim to demonstrate: strong operational performance; funding consistent with pre-transition levels; positive staff morale; organizational values intact; advancement on equity goals; and a shared vision for the future of the organization.

In the long term, the NSI is aiming to shift the narrative of executive transition, normalizing institutional support for these activities and comprehensive transition plans, resulting in stable organizations with greater cultural alignment and leadership reflective of the communities they serve. The NSI is learning alongside its grantees and plans to share the story of each participating organization as a case study at the conclusion of the pilot.

As a nonprofit leader, what should I be considering when reflecting on my organization's readiness to navigate an executive transition successfully?

- **Timeline:** How proximate is the anticipated departure? What are the major factors that will dictate this timeline?
- **Succession Planning:** Does the organization have a succession plan in place? If so, how comprehensive is it? When was it created? Did the organization incorporate staff feedback? Does the board have explicit boundaries established with a departing long-time leader? Does the organization offer staff leadership development opportunities? Do you anticipate there may be internal candidates?
- **Strategy:** Does the organization have a current strategic plan? How might this transition be an opportunity or challenge in meeting those goals? What is the organization's impact on the community?
- **Board Development:** Is this a founding, governing, or institutional board? How much oversight have they had over the executive? Does the board plan to get staff input during transition? If so, how? Is there a search committee already in place?
- **Staff Development:** Are there internal candidates for the role? How might senior staff roles evolve as a result of the transition? What support will staff need to successfully adapt to these new roles? What decision-making processes could senior staff be brought into now to support their growth in anticipation of the transition? How much staff time will be required to navigate the transition?
- **Financial:** What is the financial stability of the organization? How dependent are the funding relationships on the departing executive? When should key funders be brought into the conversation?
- **Culture:** How would you characterize the organizational culture and current climate? Can the organization articulate its guiding values? Are there signs of dysfunction (staff attrition, multiple sub-cultures that don't align, etc.) What elements of culture do you want to protect, and what needs realigning during the transition? How centralized is the power in the organization? How attached is the organization to the departing leader?
- **Equity and Representation:** Do the board and staff reflect the community served? Does the organization have explicit values or goals around diversity, equity, or inclusion? If so, how will they show up in recruitment/hiring/onboarding practices? How might unconscious bias be playing a part? What organizational culture alignment work needs to be done to set a new leader up for success?
- **Alignment:** Are board and staff operating with the same values/within the same culture? Are board and staff on the same page for what they are looking for in an executive? What qualities and skill sets are of high importance to each group? Has the board taken steps to prepare the staff for transition?
- **Transition Plan:** Is there a phased transition plan that addresses multiple phases: development and planning, successful exit, recruitment, onboarding and ongoing support? What are the associated expenses? Is the organization willing and able to contribute internal resources toward a comprehensive transition plan?
- **Scopes of Work:** If the transition plan includes existing consultant scopes of work, has the organization reached out to multiple consultants to assess compatibility? Do consultants have relevant expertise for the task? Are scopes appropriate and realistic? Does the shoe of work reference organizational culture and/or change management? Is there a clear need not represented within the plan/scopes of work?

FOR FUNDERS

I am a funder interested in potentially supporting this work. How much additional funding is needed?

The NSI is engaged in a learning and evaluation strategy as part of the pilot program, and considering next steps. In order to fund a second cohort, the NSI would need to raise \$75,000 - \$100,000 per grantee organization.

What are NSI executive transitions funds being used for?

Common expenditures for which NSI transition funds have been applied include: transition consultants, board development activities, organizational assessments, DEI consulting, executive/staff/board coaching, executive recruitment, farewell/welcome events, and departing executive consulting engagements.

Who is overseeing the pilot?

The pilot is being managed by NSI Director Carrie Harlow with strategic oversight by a committee of NSI funders, including representatives from The Carl & Roberta Deutsch Foundation, Cedars-Sinai, Durfee Foundation, The Ralph M. Parsons Foundation, and Weingart Foundation. Additional oversight is provided by the NSI's four Managing Funders: The Ahmanson Foundation, California Community Foundation, The Ralph M. Parsons Foundation, and UniHealth Foundation.

Is there a minimum expectation from participating funders?

No. Current NSI funders' contributions range from \$25,000 - \$100,000. Foundation grant cycles include annual and multi-year grants.

How often do NSI funders meet?

NSI funders convene at least twice a year to review the activities of the Initiative, discuss next steps, and learn first-hand from the experiences of nonprofit participants.



RESOURCES

For additional resources on Executive Transition:

Annie E. Casey Foundation

[Capturing the Power of Leadership Change](#)

[Founder Transitions: A Guide for Executive Directors and Boards](#)

[Next Shift: Beyond the Nonprofit Leadership Crisis](#)

Building Movement Project

[Leadership Change: Navigating intergenerational and racial dynamics](#)

[Cautionary Tales for Extended Leadership Exits](#)

[The Leadership in Leaving](#)

BoardSource

[Five Leadership Transition Types](#)

[Executive Transition Timeline](#)

[Nonprofit Board Lifecycle](#)

[Nonprofit Founder Departures: Five Challenges](#)

[Chief Executive Exit Interviews](#)

[Acting & Interim Chief Executives](#)

Harvard Business Review

[The Last Act of a Great CEO](#)

Nonprofit Quarterly

[Exit Agreements for Nonprofit CEOs](#)

TSNE MissionWorks

[Transition Planning Checklist for Executive Directors](#)

[What's Next: Transition Planning Program](#)