



# BRILLIANT TRANSFORMATION:

---

Toward Full Flourishing in  
BIPOC Leadership Transitions



# Acknowledgements

This report was made possible by the brilliance and candor of BIPOC leaders across the country who entrusted the core advisors, authors, and the Robert Sterling Clark Foundation (RSCF) to represent their truths, vulnerabilities, and the tremendous power they bring to their work and their communities. Thank you.

A team of core advisors, Bianca Anderson of ProInspire, AiLun Ku of BIPOC Leaders Network, and Ericka Stallings of Leadership Learning Community, guided the production of this report from its initial conception to fruition, bringing tremendous insight into both process and content.

The collaboration of the Building Movement Project in writing [Making \(Or Taking\) Space: Initial Themes on Nonprofit Transitions from White to BIPOC Leaders](#) strongly influenced the direction of this work. The work was improved tremendously by the insights of Trish Adobea Tchume and Lisa Cowan, and by the vision of Philip Li of the Robert Sterling Clark Foundation. Melissa Madzel generously offered an inspiring vision of what a holistic approach to transitions could look like. Alicia Sylvia (RSCF) supported every aspect of producing the report and made sure it would reach the broadest audience possible.

Amir Khadar designed the cover art and layout of this report. Their powerful work helps movements imagine the world we are creating together; more can be found here: <https://www.amirkhadar.com/>.

Shaikha Bugrais, whose work can be found at <https://www.shaikhathedesigner.com/>, designed the layout.

Michelle Flores and Elena Conte, friends and fellows of the Sterling Network NYC, authored the report.

## **Published as part of the Robert Sterling Clark Foundation's Explorations in Leadership Series**

The Robert Sterling Clark Foundation is committed to using its resources to support the field of leadership development in trying on and developing new thinking, models, supports, conversations, and communities that will grow, sustain and hold people who are using leadership as a strategy to work for equity. As distinct from its grantmaking, which supports people already doing the work, the Foundation has developed Explorations in Leadership as a learning and practice space for projects that support more sustainable, equitable, accessible, and democratic approaches to leadership. This report is published as part of our commitment to “publicly document and share learnings from our explorations – whether positive or not.” We welcome your engagement on this and other topics we are exploring. To learn more about our Explorations in Leadership and how to contact us directly about specific projects, visit <https://www.rsclark.org/exploringleadership>.

# Table of Contents

<b>Acknowledgements</b>	<b>1</b>
<b>Table of Contents</b>	<b>2</b>
<b>Executive Summary</b>	<b>4</b>
<b>Introduction</b>	<b>7</b>
What we did / Methodology	<b>9</b>
<b>BIPOC Leaders' Experiences</b>	<b>11</b>
Choosing the Role & Hiring Processes	<b>11</b>
Outgoing Executives	<b>16</b>
The Role of Staff in Leadership Transitions	<b>17</b>
Funding	<b>18</b>
THE MANY MANIFESTATIONS OF RACISM AND WHITE SUPREMACY & THE SPECIFICITY OF ANTI-BLACKNESS	<b>13</b>
THE BRILLIANCE: BIPOC Leaders Strategize & Execute	<b>15</b>
<b>Reccomendations</b>	<b>26</b>
Overview	<b>26</b>
Essential for Funders	<b>26</b>
For Organizations Considering Transition	<b>30</b>
Essential for Boards	<b>32</b>
Essential for the Outgoing Leader	<b>34</b>
Toward Transformative Leadership and Transforming the Sector	<b>36</b>
<b>Conclusion</b>	<b>40</b>



# Executive Summary

Over the past decade, many social change organizations have started to take action to address systemic racism within their systems and structures. As part of this shift, many organizations have sought out the leadership of Black people, Indigenous people, and other People of Color (BIPOC). However, in many cases, organizations have not created the conditions that would support these leaders to flourish. Nevertheless, leaders of color have brought strength, experience, and brilliance into positions of power and created ways to advance much needed change.

This study reflects the insight of BIPOC leaders navigating positions of power in social change organizations as they succeeded white predecessors. Through a partnership between Ericka Stallings of Leadership Learning Community, Bianca Anderson of ProInspire, and AiLun Ku of BIPOC Leaders Network and the Robert Sterling Clark Foundation, we spoke with BIPOC leaders from across the country, who shared a wide range of experiences related to their transitions, their strategies for navigating these transitions, and specific recommendations for how to make these transitions better.

## We learned:

- ◆ The experiences of BIPOC moving into nonprofit leadership are multifaceted and complex, as are the organizational dynamics. Racism shows up in many different ways.
- ◆ BIPOC leaders call for intentionality and transparency. When organizations have carried out clear processes, transitions have been better.

- ◆ BIPOC leaders are doing the work necessary to build the world we seek to create. We are coming up with and making the solutions right now, and could use some support.

Creating the conditions for the full flourishing of BIPOC leadership will require new practices throughout the nonprofit ecosystem. The call for intentionality and transparency runs throughout these recommendations, as does the call for recognition that everyone involved in supporting these transitions brings a different kind of power to the situation. **These recommendations include:**

## For Funders

- ◆ Fully acknowledge your outsized power and operationalize it
- ◆ Trust organizations to know what they need
- ◆ Fund like you want BIPOC leaders and their organizations to flourish
- ◆ Remember that getting it wrong compromises grantees' work and communities

## For Organizations in Transition

- ◆ Meet the following baseline prerequisites:
  - ◇ Understand what the organization needs from the next executive leader(s)
  - ◇ Clarify why the organization is seeking a BIPOC leader, best done in the context of broader organizational diversity/equity/inclusion/access/justice (DEIAJ) work
  - ◇ The board is clear on the ways its role expands during the time of transition, and at which point its role will revert back to the organizational baseline
- ◆ Create, share, and follow a clear transition plan





## For Boards

- ◆ Make a grounded assessment of the organization, its culture, and its ability to fully support a BIPOC leader; outline concrete steps to address the challenges raised in the transition plan
- ◆ Be transparent about the challenges facing the organization
- ◆ Execute a documented, intentional search process that includes individualized outreach to BIPOC leaders already connected to the organization
- ◆ Reach a clear, fair, *written* agreement with the new leader that includes a salary grounded in equity principles

## For Exiting Leaders

- ◆ Lean into the power of your role and use it to create a clear, multi-phase, collaborative process at least a year in advance of a formal announcement
- ◆ Fundraise to support the full cost of the transition
- ◆ Transfer key organizational relationships, especially with funders
- ◆ Document and share systems, policies, and processes
- ◆ Place a clear boundary on your exit timeline; then let go and leave

## Toward Transformative Leadership & Transforming the Sector

- ◆ Doing these transitions is essential. Keep going!
- ◆ Invest in collective spaces for emerging and established BIPOC leaders to grow and gain support in community
- ◆ Innovate and share new models for nonprofit structures and roles
- ◆ Create conditions for broader sectoral shift

# Introduction

In a time of multiple crises across systems, the need for social change presents in many different ways. Communities across the country face intersecting forms of injustice that show up in thorny complexity. The organizations we talked with have different approaches to addressing these conditions, but the unifying element is awareness of the need to create change at multiple levels simultaneously in order to create a more just world.

It's a tall order. And one that many leaders who contributed to this report spoke of, particularly, as a calling. Neha Mahajan and Felicia Griffin express this call to leadership eloquently, writing:

BIPOC leaders are being asked to simultaneously dismantle the past, survive in the present, and create an alternative future. Our leadership, needed now more than ever, is being tested like never before. We are tasked with fighting for short- and long-term goals in tandem. We are called on to hold space for grief, trauma, and despair while also uplifting hope, courage, and vision. We have to navigate the scarcity created by economic, racial, and gender inequality while tapping into an abundance mentality to demand what we need. We must lift up our unique histories and conditions while also stepping up our practice of transforming conflict, resisting divide-and-conquer tactics, and deepening solidarity with one another. This is the call of leadership this moment requires, and many of us are answering.<sup>1</sup>

This study reflects the work of BIPOC leaders - mostly Black women - answering that call. Collectively, they are creating a more just world with the work that they do *and* the way they do it. Their organizations are spaces of practice, spaces where communities and leaders try on different ways of doing the work necessary to change the world.

Traditionally, nonprofit leadership has been rooted in hierarchy and specific kinds of power that uphold the very same systems that many organizations are struggling to change. The resulting tension creates dissonance and friction between a mission to fulfill a new vision for the world and organizational structures that recreate problematic power dynamics. Frequently this manifests as a wide, racialized gap between the communities that organizations work with and the boards and staff (especially executive staff), of the organizations doing the work.

<sup>1</sup> Mahajan, N. and F. Griffith. (2023, April 20). The call of leadership now: BIPOC leaders in a syndemic era. <https://nonprofitquarterly.org/the-call-of-leadership-now-bipoc-leaders-in-a-syndemic-era/>



For many organizations, a desire to begin dismantling this dynamic motivates an intentional shift toward BIPOC leadership. Certainly, greater BIPOC representation is one highly visible part of a necessary shift. And, if we want it to actually lead to greater organizational change, it must accompany other shifts in practice that would make space for practicing more liberatory leadership.

As a starting point for organizational change, intentionally shifting from white to BIPOC leadership opens the possibility for positive change as well as particular challenges that organizations should keep in mind:

- ◆ **Unrealistic expectations:** Leadership transitions open space for change that often elevates the expectations of staff and community members. Without proper planning and support to manage change, the energy of staff and community could be lost, dispersed, or channeled away from mission-supporting activity, creating additional challenges with which the new leader must grapple.
- ◆ **Representation alone doesn't solve systems of oppression:** BIPOC leaders can also uphold systems of race, class, and gender hierarchy. In the absence of structural changes to address racism within organizations, simple representation is unlikely to succeed in challenging these dynamics in a meaningful way.
- ◆ **Misplaced responsibility:** The collective challenges the sector faces and the structural challenges an organization faces can be misattributed to the personal challenges (or failings!) of the new BIPOC leader. Furthermore, the results of white outgoing EDs and disproportionately white, wealthy boards failing to prepare for more holistic change could be transferred to the new BIPOC leader, reinforcing racist stereotypes about BIPOC leaders and making it harder for organizations to make better choices in the future.

### ***It absolutely doesn't have to be this way.***

Outgoing leaders and boards, organization staff, and the consultants and funders who support their work can make better choices for a leadership transition that also builds toward and enacts their vision for a better world.

BIPOC leaders who have been through this kind of transition generously shared their hard won learnings in hopes that their collective knowledge might contribute to improving practice. They detailed what BIPOC leaders experience as they move into leadership of historically white-led organizations: from the hiring process to the decision to take on the role, to relationships with outgoing leadership, and from staff dynamics to funder relationships. Racism lurks within many aspects of these transitions.

We trace these dynamics because we hope it will help everyone involved become more aware of the impact of their choices – and therefore more intentional – at the many junctures of a planned transition.

## **What we did / Methodology**

This effort began with the intention to quickly create a more actionable follow-up to [Making \(and Taking\) Space](#) (2021), motivated by the overwhelming response the report received. To date, more than 700 people have downloaded the report and scores more have circulated it. Many have come to RSCF asking about recommendations for what to do with the knowledge that was recorded in that document, with the intention of moving from naming a problem to envisioning a better future.

Knowing it didn't have the answer, Robert Sterling Clark Foundation staff sought out the expertise of partners who are leading change in their organizations and across the field. These core partners - Ericka Stallings of Leadership Learning Community, Bianca Anderson of ProInspire, and AiLun Ku of the BIPOC Leaders' Network - reminded the Foundation and its consultants, Michelle Flores and Elena Conte, that to truly honor and uplift the experiences and wisdom of BIPOC nonprofit leaders who succeeded white predecessors, this work would need to be conducted differently than a traditional research project.

We quickly shifted from a consultative model (where the Foundation would interview the 'experts') to an active partnership – and adjusted the timeline and the budget – to give the effort the space and pace for thorough engagement. We oriented the project around the question of what the “Full Flourishing of BIPOC Leadership” would look like in practice. In facilitated group conversations, we created space for BIPOC leaders to envision their own flourishing and to create recommendations, grounded in experience, about how to achieve it. The Core Leaders and all the participants in the sessions were compensated for their time.

The Core Leaders and participants were clear that we needed to center the joy, possibilities, and benefits of the shift unfolding across the sector, even when the transition challenges have been intense and grossly unjust. Participants wanted the space to tell their stories, but no one wanted to dwell on the trauma or get stuck in their specific experience. Everyone wanted the space to be in community with each other and to envision the world they wanted to see, along with steps that support arriving there.



## Organizational Contexts & Identities of Participating Leaders

Twenty-nine participating leaders of color provided input into this effort, working in all regions of the U.S. The cohort overwhelmingly identified as women or gender expansive, with just one man participating. Nearly two-thirds of the cohort named some African heritage.<sup>2</sup> The majority of leaders were in their mid 30's to mid 40's, but the age range spanned decades, from 20's to 60's.

More than ninety-percent of participants succeeded a white leader, with a significant portion of these being white women. About half of participants succeeded a founder. Notably, a substantial majority of these white leaders were involved in selecting or recruiting the participant in some significant way.

The tenures represented included recent, established, and long-term leaders. Most leaders were sole directors, but about ten percent of participants were in co-leadership roles, reflecting the growth of this model. The most common organizational foci were community programming, advocacy, education, and leadership development.

<sup>2</sup> Forty percent identified as Black or African American only. One quarter named Asian heritage (mostly East Asian multi-racial), about fifteen percent identified as at least part Latinx, and a similar percentage named indigenous ancestry. About half were raised by immigrants. Twenty percent were bi- or multi-racial and named white as one of their identities.

# BIPOC Leaders' Experiences

In writing this report, we sought to let the leaders speak for themselves as much as possible and as faithfully as we could. The questions and tensions arise from what they in fact grapple with in their work.

## Choosing the Role & Hiring Processes

### Multiple Paths to the Executive Role

Paths to the executive role varied along two basic axes: 1) whether the leaders were specifically recruited or applied on their own initiative, and 2) whether leaders were recruited from within the organization or came from outside. Regardless of how they came into the role, nearly all the leaders reported that this was an important decision in their career.

Most leaders we spoke with were specifically recruited by someone affiliated with the organization in some way: board members, staff, founders, donors, and previous executive directors. Many of those who were not specifically recruited by someone already had some relationship with the organization. Some of those who were recruited were promoted from within. From both inside and outside, some leaders first took on leadership roles as deputies or interim executive directors. Others were appointed directly to the executive role.

In many cases, leaders reported that they were recruited because of their racial identity. Many expressed some ambivalence about this. In some cases, being recruited was a kind of recognition and an affirmation of worth.

“ I had a like - Oh, maybe I'm not ready - sensation, so being explicitly asked... feels different than just seeing a job posting. So I think if you want more leadership, then affirmatively reaching out...”



“ This woman I've known since I was 22 - her biggest causes, the causes she champions are [in unrelated fields]...so for her to see in me that I could be the type of leader that [the organization] needed, or that I could thrive here...Had she not pushed me, I would not have applied for the job.”

While for others, it felt like tokenization from the beginning.

“ And I'm just gonna say it: I had a certain sensation that any Black person would do....I know they interviewed other people. But there was a certain assumption that my Blackness came with knowledge that actually came from my work and experience and effort.”

This tokenization often took the form of deliberate targeting of BIPOC leaders for the sake of the organization's, or an individual outgoing leader's, image and did not translate into confidence or support.

“ ...It kind of felt like an auction block of the sort... like, this person looks like they can do the job, that type of thing, and it's just bringing it all kind of back to, you know, to slavery and things like that....I feel like all throughout my own career as a leader, up until now, people are challenging what you know and you wonder if that would be the case if it was someone that was not a person of color, not a woman, not a Black woman...”

It was deeply dehumanizing:

“ ...the reason I couldn't celebrate as much is because it almost felt like a pony show: like here's this Black woman out here. Come see her. She's great. And then all of this other stuff happened....it's like, was it really a celebration? Or was it just, 'we got a Black person, now y'all give us money?'" (referring to the board's expectation of fundraising from her appointment)

For this reason, several leaders mentioned the importance of transparent processes as one way of partially offsetting this harm.

“ I went through with a thorough process, and because of that I feel completely legitimate.... Everyone saw a process, and, whether they supported me or not, they actually saw me go through what every other candidate went through. So at the end it was not like a favor or a, you know, check the box. Because a lot of the racial, and I don't think gender so much, but racial you know, issues were there subconsciously or not.”

Even so, these processes also became sites of inequity as leaders of color were made to go through elongated search processes while white colleagues sometimes passed through informally.

“ I've had to share feedback that my [four month long] interview process, although they didn't consider any other candidates, felt like I had to do a lot. I felt supported, I felt seen. But when I compare it to the process our COO had, who is a white woman....she did not have to interview at all.”

Significant inequities notwithstanding, many leaders reported overall satisfaction with their hiring process. Most people reported being interviewed by some combination of board and staff. Rarely were members of an organization's broader community included in the hiring process. Overall, leaders expressed a desire for greater transparency in the hiring process and greater inclusivity of staff and community members.

## Choosing the Role

Many participants mentioned some aversion to pursuing this work, knowing how unreasonable the job can be from peers, mentors, or predecessors, and having previous experience navigating positions of power. Others, particularly those who were recruited, noted some ambivalence about their agency in “choosing” the role. Sometimes this was because of pressure from informal recruiters who were mentors or other longstanding professional contacts, but more frequently because of a sense of accountability to community.

Several patterns emerged in terms of how people understood their reasons for choosing to pursue, or accept, the role. BIPOC leaders:

- ◆ felt a deep connection and sense of accountability to the communities their organizations serve
- ◆ felt a sense of “calling,” that the work deeply aligned with their personal life purpose
- ◆ were uniquely qualified, based on their professional background and lived experience
- ◆ found the role to be a powerful outlet to express their leadership.



“ Yes, we have personal agency...but I think sometimes, what I've heard is, it felt like there was no other alternative. Someone had to do it and I felt like it had to be me, or [the] community felt like it had to be me. We had to meet the cause...the burden of responsibility that BIPOC folks often feel to lead our organization, an organization that's supposed to be helping our community.”

“ Our founder asked me out to coffee....I thought she just wanted my thoughts on how the transition was going and what we could do to fix it. And she asked me if I was interested in interim CEO. I will never forget that moment because there was without a doubt that I could do it....and so it was really kind of an emotional 24 hours....In that moment...I had zero imposter syndrome. I just knew that I was who was best for the organization at that time.”

## Different Kinds of Roles

The leaders who participated in these sessions had given significant thought to different models of leadership in considering their own roles. Most hold a sole principal role while some are in co-directorships. For some leaders, co-directorship was a condition of their accepting the role.

“ ...because I had led an organization prior and really got burnt out very, very quickly, it was like, I know I can do it, I enjoy the role. But I don't like to do it alone. It can feel very isolating. It felt like the level of responsibility - not only running the organization, but in doing work that was about race and racism - for me, as a Black woman, it also tore my soul in some ways. I need some support in holding space for others. So as an org leader, it was just a very unique experience - not only leading in isolation of leadership, but also leading work that I'm directly impacted by.”

Not all BIPOC leaders endeavor to transform the nature of nonprofit leadership or the basic structure of nonprofits in the short term, but many do. Those who seek to implement practices that enact a more transformative vision of leadership often reported friction from board and senior staff. Both leaders working in more traditional structures and those whose work had more liberatory aims reported that there was often significant misalignment between board and staff expectations concerning the pace and nature of changes.

## Negotiations

Generally, BIPOC leaders succeeding white leaders navigate challenging dynamics in negotiating the terms of their employment - with mixed results. With respect to salary, some reported not negotiating at all, while others presented reasons, and regrets, for not negotiating higher salaries. Some leaders framed their salary negotiation in terms of their performance, noting a desire to “prove themselves” before asking for a higher salary. Others framed their salary negotiation as yet another fundraising need to be met. None of the leaders we spoke with had negotiated a contract, though some negotiated for different pay structures and protections in the case of dismissal. Racial dynamics impacted these negotiations in both subtle and more overt ways, as negotiations reflected the overall power dynamics at play in each leader's transition as well as the priorities and level of preparation of the board.

“ Sometimes these founders come in and take low salaries because they have other sources of income and then you have to come in and demand something higher. Maybe the dream is for the board/hiring committee to research not just a comparable salary but an equitable rate.”

### Common experiences of BIPOC leaders in Choosing Leadership & Hiring

BIPOC leaders were **actively recruited by a white person** with some affiliation to the organization.

Boards were **intentionally looking for a BIPOC leader**, often without clearly articulating why.

**Navigating tokenization** was a time-consuming and stressful task for many BIPOC leaders.

**Board members were often not transparent**, or knowledgeable, about the financial and programmatic situation of the organizations.

Whether leaders were recruited or they pursued the position, the **transparency and fairness of the process was important** to them as validation of their leadership.

BIPOC leaders navigate **significant challenges in negotiating** the terms of their employment.



## Outgoing Executives

Outgoing executives featured prominently in shaping the quality of a transition for BIPOC leaders. Amongst the BIPOC leaders we spoke with, there were a variety of arrangements, but many participants reported receiving some kind of transitional support from outgoing leaders. Others reported significant tension and conflict. In other cases, unplanned or poorly planned transitions created a leadership vacuum that they then moved into. Thus, some leaders came into organizations without the support or presence of the previous leader. In that case, they sought out other sources of organizational support from the board, staff, informal mentors, and external paid support, such as coaches.

The timeline of support ranged from those who received no overlap or guidance to those who began receiving some level of mentoring well in advance of the transition. In almost every case, those leaders who did not receive support from their predecessors sought support from outside the organization. Indeed, leaders also expressed differing opinions about the level of support that they wanted. Depending on the relationship, some flexibility was helpful.

The key factors that leaders said contributed to a positive experience for new leaders were transparency and intentionality. Obviously, there is no single solution that will work for every organization, but the importance of the relationship indicates that it should be considered carefully by boards and transition consultants.

"Once it was decided that [the outgoing leader] was gonna recommend me, it felt like we were in it together. And it was our job to convince the board to support his recommendations. And that's just what we did together. And he had the role that he was gonna explicitly play and lead. And there was a role that I needed to play and lead on. And we just made that really clear. And we moved in sync essentially throughout the process....and it didn't feel exclusive. The other directors in the org were very much involved in the process and played a strategic role. Because part of what he was thinking was, you don't have to hold all of this. You have people here to support you."

"My predecessor stayed on as a consultant but we were lax about the transition and things got messy. There were lots of weird feelings and some confusion about her role. It wasn't a huge mess but it added a bit of stress."

"I had no transition. My predecessor spent half a day with me."

"My first month there [the former ED] came in and canceled our major fundraiser which brought in like six figures. Our budget was about a million dollars at the time. And I was just aghast. ...But that's how the organization ran. So when we get toward the end of the fiscal year and I'm like he said he was gonna figure this \$100,000 in and it has not happened and I need money to pay the bills, I think that was an eye opener for a lot of people."

## Interim Executive Directors

Several organizations experimented with interim directorships with varying degrees of intentionality and success. Some leaders saw the interim role as an opportunity for an organization to do some of the work to create conditions in which a BIPOC leader could come in and be successful. While this was not an area we had the opportunity to discuss at length, the strategy of engaging an interim director *intentionally* to create better conditions for an incoming BIPOC leader is important to note, and is gaining traction in the field.

## The Role of Staff in Leadership Transitions

"I actually wrestled between that time period [as an interim] about whether I wanted the job and I came to the decision that I wanted to take the job. *What changed my mind was how the team felt about me.*"

At each stage of transition, leaders noted the importance of staff dynamics, both as a source of validation and support, and as a powerful barrier to enacting their vision. Leaders also reported that investing in their staff was a powerful way to strengthen the organization. In the best cases, staff played a key role in the success of the transition, sharing essential knowledge and developing the skills of new leaders, while maintaining key relationships and leading the core work of the organization. These organizations were better prepared for transition because leadership and power were not held by a single person, alleviating the pressure on the new leader. Notably, those whose hiring process included staff also reported better experiences after their transition. Indeed, staff often have expertise about the organization that the board does not possess.



“Instead of making new hires we really had a smooth process around maintaining staff and didn't have a lot of conflict amongst the staff. One of the things we committed to early on was building trust amongst staff members. And one of the senior staff...really believed in that deeply and took on a leadership role in getting an outside facilitator to come in and help us work on building trust with each other. So it was something we actively invested in and that we are still actively investing in.”

Many BIPOC leaders succeeded white leaders who had led organizations with a majority of BIPOC staff. Staff often had heightened expectations of the new leaders, especially when it came to addressing racial tensions with the organization. Leaders also reported that the previous racial dynamics sometimes entailed highly problematic management practices. For some leaders, addressing these issues was the most stressful aspect of their job. The importance of staff dynamics for the experience of BIPOC leaders suggests an important avenue for further investigation, especially as organizations shift toward a broader understanding of the full length of transition.<sup>1</sup>

## Funding

Funding has a huge impact on what leaders are able to achieve and how they are able to reimagine their organizations. Many leaders reported poorly managed finances and lack of transparency in the financial situation of their organizations prior to their leadership. Others felt unprepared and unsupported in executing this area of work, citing staff turnover and a lack of training opportunities. This was exacerbated by funder behavior, with foundations and institutions continuing to give disproportionately to white-led organizations. In this context, it is not surprising that many new BIPOC leaders faced significant funding challenges. On the other hand, those leaders whose organizations had strong, well-managed financial situations reported more space to focus on their own leadership and the core work of the organization. Unfortunately, such situations were rare. More frequently, leaders cited funder relationships as a source of stress, tension, and racist dynamics.

These dynamics included funder mistrust expressed as skepticism about new leaders' ability to achieve their goals. In some cases, funder priorities created tension with leaders' commitment to their communities, as with one leader who noted, “one of our funders paid \$750k for capacity builders. Just give us the money. *We know what we need.*”

Many leaders came into organizations that lacked infrastructure for developing greater financial management and fundraising skills. For some, this was because the previous

leader - often a founder - had an outsized role in fundraising. For others, it was because of staff turnover or the lack of funds committed to those areas of work.

Even with these challenges, quite a few of the leaders we spoke with came in with significant expertise and experience in fundraising. And many excelled through challenges. Still, experience was not necessarily a benefit in terms of the personal cost of the work. Some BIPOC leaders came into their roles with trauma and a history of personal harm related to fundraising that required time and work to overcome.

“ I'm trying to build, carve out my own relationship with funders in my own way and that's a little traumatic. I have funder trauma from the past, dealing with white funders. To be really honest, I was in a room with funders and...it was so horrible. I was the only Black person in the room full of white funders. And that was one of the reasons it took me a long time to take this position.”

For many, this was a profound source of frustration.

“ It can be overwhelming when you have so many responsibilities and [are] coming into chaos...like when you have to do your elevator pitch and convince the room full of white wealthy people that your organization, that your position, that your work and your community, deserves these dollars, when you know damn well we deserve that and more.”

They also noted that their approach to fundraising sometimes differed from their white predecessors.

“ I don't want to work for funders. I want to work for the community. And so that is different from the previous executive director: she was working for funders and I'm working for the community.”

Others noted that even when they set and achieved bold fundraising goals, their success was not always recognized or appreciated by their boards. However, organizations that were in strong financial shape before the transition made the transition easier for the new BIPOC leader.

“ One thing that helps is that we are not worried financially. It all seems doable. I don't feel rushed. Constant reimagining takes time, takes space in your body. The leadership we're getting to is an embodied leadership. It's an embodied thing. You really have to have some spaciousness to do that. Space so that you are not hustle, hustle, hustle, grind. I can tell my team we're gonna slow down and know it's funded and people will keep their jobs. I wish that all leaders of color have time and resources, eighteen months to transition in.”

<sup>1</sup> Dax Devlon-Ross unpacks some of the dynamics Black leaders face in relationships with staff as they move into power and invites consideration of what he's learned from justice-centered leadership practices in the field. Devlon-Ross, D. (2023, April 27). The challenge to power. <https://nonprofitquarterly.org/the-challenge-to-power/>



## THE MANY MANIFESTATIONS OF RACISM AND WHITE SUPREMACY & THE SPECIFICITY OF ANTI-BLACKNESS

“ My experience has been so tremendously difficult that I would not in good faith recommend it for the health of a BIPOC woman.”

Racial capitalism is a dynamic system that requires and sustains the constant replication of racial inequity. This dynamism means that racism and white supremacy show up in everyday processes, including nonprofit leadership, in myriad ways that change over time and in different contexts. What that means for BIPOC leadership transitions is that making improvements will require a multiplicity of approaches as well. There will not be - and we have not found - a small number of simple fixes that will work in any situation. Instead, we found a lot of tensions and contradictions.

At one organization, a hands-on, nine month engagement between an outgoing white man executive director and the Black woman incoming executive director might generate healthy relationships and shared organizational understanding while increasing the new leader's competence and confidence. At another organization, an extended engagement with an outgoing white man executive director and the Black woman incoming executive director might generate mistrust, undermine the new leader's initiatives, and create confusion among staff. Of course, personality might explain part of that. But, by breaking down these processes into even smaller parts, defining choice points, and understanding how racial dynamics manifest within them, it might be possible to craft interventions that lead to better outcomes.

BIPOC leaders experience racism in different ways depending on many factors including: whether the board has prepared and understood why they were seeking a BIPOC leader for the organization, existing tensions among the organization's staff, the new leader's appearance and perceived background, the implicit biases of their interlocutors, and likely others that were not named explicitly.

The BIPOC leaders we spoke with named some patterns that were persistent across organizations.

- ◆ **Objectification and tokenization** were especially pervasive: Leaders reported relationships marked by assumptions about their behavior based on their race and perceived race. Several participants talked about having a sense that “any Black person would do,” and a conflation between their identity and their expertise. Others, more than one, talked specifically about feeling as if they were in a “dog and pony show.” They felt that their leadership was meant to credit other (white) people, or was a means to an end (signaling to funders), or otherwise a panacea for a wide range of racial problems.
- ◆ **White confusion** Some of this objectification coincides often with an inability on the part of outgoing white leaders and boards to clearly articulate why they are specifically seeking a BIPOC leader and what they hoped that would mean for the organization.

“I feel like people sometimes think they're fulfilling a commitment on racial justice by just putting a Black person in a role...so what does it really mean to live out commitments to racial justice and equity? ... [I]t doesn't just mean putting Black bodies in a space. ...[D]on't put me in a space where it's toxic and it's harmful and it's like a sinking ship and you think I'm supposed to save it. That is actually counterproductive.”

- ◆ **Unrealistic expectations** BIPOC leaders reported unrealistic expectations from boards and staff, especially with respect to shifts in organizational culture. These seemed to stem from the assumption that finding a leader with the right identity could fix underlying inequities in the organization's culture.

“...we're trying to shift it so that we have shared power and, at the same time, people are expecting me to come up with all the answers ...Well the previous CEO didn't solve all the problems all right now, why are you expecting me, all of a sudden, in my first three months to solve all the problems?”

- ◆ **Questioning expertise and actively undermining leadership** Leaders reported that many of their working partners (boards, staff, funders) seemed to harbor or actively articulate doubts about their ability to carry out the organization's work. Some of the ways this was expressed was in hostile questioning from the board, staff stepping down directly as a result of the BIPOC leader's appointment, and attempts to go around the leader by involving their predecessor. As a result, many leaders reported feeling like they had to constantly prove themselves.



- ◆ **The Specificity of Anti-Blackness** In many instances, leaders reported the specificity of the anti-Blackness in the racism they experienced at multiple levels. This ranged from specific microaggressions to the waning tide of attention and funding-that-often-did-not-materialize in the wake of the uprisings around police killings of Black people in 2020.<sup>2</sup>
- ◆ **Extreme isolation** The isolation of executive leadership in hierarchies is well documented. For BIPOC leaders, this sense of isolation was exacerbated by the racial dynamics described here and, for some, was intensified by challenging staff dynamics unaddressed by their predecessors.

Complexity arises when these manifestations map onto existing organizational dynamics and create a web of racist entanglements that often appear in contradictory ways. For example, two supervisory structures that look very different from the outside might both become racialized in ways that undermine the leadership of a new BIPOC leader. When boards and staff don't give BIPOC leaders the benefit of the doubt, it becomes even more difficult to realize one's vision. Indeed, the combination of unrealistic expectations and constantly questioning expertise leaves BIPOC leaders little leeway for taking the risks necessary to carry out substantive change.

## THE BRILLIANCE: BIPOC Leaders Strategize & Execute

The BIPOC leaders represented in this report spend significant time and resources addressing challenges they were not informed about ahead of time. In addition, they often have to navigate extremely difficult racial dynamics, conflicts, and inequities. The BIPOC leaders we spoke with bring deep experience, highly sought-after skills, and relationships to their roles. They shared many examples of leveraging their unique abilities to address the challenges they faced and to execute strategies for change. To be clear, not everyone we spoke with was fully flourishing. The obstacles are great. And yet, the leaders we spoke with have experimented with and enacted effective strategies for improving their transitions themselves.

## Exceptional Performance

By the existing criteria of the organizations they lead, many of the leaders we spoke with performed exceptionally well. One leader led her organization through a significant multi-year campaign that they won shortly after her appointment. Another leader doubled her organizational budget in her first year of leadership. Another leader invested in updating a key technology for significantly expanding her organization's programming.

Leaders grew partnerships, documented innovative learnings in their fields, and expanded programs. In the context of constant questioning and the significant challenges laid out here, this excellence is particularly notable.

## Leading Fully & Authentically

Many leaders' prior experiences shaped a variety of strategies for responding to the racial dynamics they faced in transition. For the leaders we talked with, several noted that it was important to their sense of success to be able to lead authentically, both in terms of their expression of self and in terms of how they guided the organization toward its mission.

“ there's something about authenticity - the opportunity and access to be authentic - how can we get to the place where we have people in these roles and they can authentically be themselves? ”

For one leader this manifested in a particular way during the uprisings of 2020. In response to the police murders of Black people, this leader, as many of her peers, put out a statement on behalf of her organization. In response, a white donor reached out to her white predecessor to question her statement. Even so, this leader did not change her comment and remained firm in what she had said.

“ And I felt in my power, like I'm not even gonna, I don't need to engage. I'm not gonna bring him in. I don't care... But in that also I just got a lot of accolades [from people] that shared my response to the team around not caring and I'm not going to say, 'I apologize', and I'm not going to walk anything back. I got a lot of recognition: like oh wow that's a big difference that you could do [that]. You don't have to kowtow to the donor... ”

<sup>2</sup> See Black Funding Denied: Where are we Two Years Later? by the National Council for Responsive Philanthropy at <https://www.ncrp.org/2023/03/community-foundation-giving-to-black-communities.htm> and American companies pledged \$50 billion to Black communities. Most of it hasn't materialized by Marco Quiroz-Gutierrez, Fortune, May 6, 2021.



For other leaders, leading authentically was more about the day-to-day work of rebuilding their organizations in line with their values.

“...as a Black woman who is trying to understand how I show up in the world, my own cultural norms, and how to hold that authentically without feeling like I have to code switch.... I start to come into my authentic power, and I want to bring that into an organization. So an example of that would be: being able to center relationship - like people over productivity - to me that feels like an approach that communities of color often bring in. It's like let's just get to know each other. Let's slow down a little bit, and let me understand you and your people before we start to like go, go, go.”

## Naming & Addressing Racism Directly

Several leaders mentioned the importance of naming racist dynamics as they happened. For these leaders, naming these dynamics became a way of forcing acknowledgment, not only of the dynamics at play, but of these leaders' full selves. Naming racist dynamics was also a way of creating enough of a pause so that their white interlocutors could also reckon with what is happening.

“ I do that more and more, just naming some of the dynamics within a conversation. With a donor, with a board member, just to hold people accountable. It's like, listen, it's not just mine to have, it's ours to have. And I just want to let you know that I'm aware...and I'm holding you and making sure that you're aware, and it helps to shift the power dynamic a bit in that moment.”

## Transformative Leadership

Not all BIPOC leaders share a vision for transformative leadership, but many do, and this adds an additional dimension to the work that is often not taken into account. Indeed, many of the problems identified by leaders can only be addressed through broader structural changes. As this report reflects, many of the leaders we spoke with had developed expertise not only in their fields, but had deeply considered ideas about how their work contributed to a greater transformation of the sector and society as a whole.

“..it was...me being me and then leaning into...we're going to do things differently. Because I want to do things differently, and I think people felt that. They felt like they were being heard, they felt like they were not being worked to the bone, and they appreciated the moments that we started to build into our processes.”

## Seeking and Securing Sources of Support

Possibly the most important strategy that BIPOC leaders drew on and recommended was to have consistent sources of individual and collective support. Leaders found this support from both formal and informal sources, inside and outside of their organizations. Leaders secured support from board members, former staff of their organizations, former colleagues, and in affinity groups and communities of practice. Some of these were formal channels supported by funders or paid for out of professional development funds. Other times, these were personal relationships that leaders had cultivated previously and that deepened in this important moment. Several leaders also talked about the importance of support from partners and close friends. Many leaders activated these support systems with frequency and regularity, meeting weekly or even talking daily with their closest advisers. While others had more distant or ad hoc systems of support, all of the leaders who mentioned these relationships, said they were critical for their ability to do the work.

"You need someone in your corner supporting you in order to be successful in this role and without a support system in place, you'll crumble under the pressure. And so the right support from the right people, in your personal life, as well as in this professional circle, is instrumental."



# Recommendations

## Overview

Many of the recommendations in this report appear in different forms in other resources that exist on supporting nonprofit transitions. What distinguishes them and – we believe – should give them outsized weight, is that they come from BIPOC leaders themselves. As is so often the case, doing right by those closest to an issue has the incredible effect of benefiting everyone. What we seek to highlight in this report however, is twofold:

The recommendations come directly from the collective grappling around the lived experiences of incoming leaders of color, especially women and gender non-conforming leaders of color, the majority of whom identify at least partially as of African descent. They are directly rooted in the realities of what commonly happens in the sector, and as such, striving to heed them is an important way to follow BIPOC leaders.

As such, the recommendations here are not just “nice-to-haves” – they are especially critical to doing a nonprofit leadership transition from a white leader to a leader of color in a way that supports the incoming leader and the organization. Consider them carefully, and if you are having trouble enacting them, push yourself and the organization to think creatively about going beyond what you think you can do, and also how you can embody the spirit of the recommendation in alternative ways.

## Essential for Funders

Philanthropy can take powerful action toward catalyzing structural change in the sector. These recommendations reflect the experience of BIPOC leaders from across the country whose work is funded by a broad range of institutional, governmental, and individual donors. Their experiences indicate that, on the shifty terrain of transition, funders can be a stabilizing force, supporting continuity of purpose, while investing adequately to allow change to take root.

## Fully acknowledge your outsized power and operationalize it for good

Foundations and major donors must acknowledge that they wield outsized power in shaping the quality of these transitions. Acknowledging this power and operationalizing it – by listening to and in partnership with BIPOC leaders – is the fastest and most impactful way to affect change sector-wide. On the other hand, failing to generously and thoughtfully support these transitions while increasing pressure on non-profit organizations to demonstrate their commitment to BIPOC leadership, is both hypocritical and drives tokenization.

As participants plainly noted, “A lot of our sector is driven by the energy and the power that foundations hold” and “just by virtue of how our society is structured, [funders] have the microphone in ways that we don't as executive directors.”

While supporting BIPOC leadership transitions may be an especially good fit for foundations who support racial justice and/or leadership development, **it's time for program-oriented funders to internalize that the health and infrastructure of an organization is inextricable from its impact in the world – and to express that through their docket.** As one participant succinctly put it, “[Funders] love to support a special project, they should also get excited about funding organizational infrastructure!”

## Trust organizations to know what they need and reduce barriers to funding

Participants were unanimous that the best way to support an organization making a transition to a BIPOC leader is to grant substantial, multi-year general operating funds. These funds should be easily accessible and not be conditioned upon additional requirements.

Organizations know what they need – and funders should not interfere with that assessment by imposing their own conditions, or by cherry-picking and generously funding capacity-building organizations at the expense of the organizations themselves.



## Fund like you want BIPOC leaders and their organizations to flourish

### *Fund for the true length of a transition*

A repeated theme that resonated throughout the discussion of incoming leaders' experiences – and from the best practices that outgoing leaders identified – is that transitions are not quick. The best ones involve a thoughtful preparatory phase, and all of them require substantial support after the BIPOC leader has formally stepped in. Where preparation is the most limited, the period of organizational transition after the new leader arrives is often more complicated and in need of even greater support. The true length of a well-planned and executed transition was identified to be 2.5 to 3 years!

### *Dimensions of support*

**Participants identified at least four dimensions of support that organizations making these transitions require and they are detailed below so that funders can truly absorb the scale of what it means to offer support – not so that funders can pick and choose what they deem worthy of support.**

As one participant put it,

“ No free lunch, meditation app, or leadership training makes up for the money.”

Support is needed for: 1) the operations of the organization, 2) the professional and personal development of the incoming director, 3) DEIAJ work, and 4) professional development and relationship work among staff.

Fundraising takes a substantial portion of a director's time, and having a greater sense of security during the first years enables the director to attend to other dimensions of the transition. Unfortunately, participants described that many funders go in the opposite direction when there is a leadership change, cutting or holding back funding either because of an individual rather than organizational relationship with the former director, or as a “test” to see first if the new leader will be able to continue the work in the way in which a funder approves. Major donors may also be individually connected to the outgoing leader, and without proper relationship transition, these sources may dry up just when the new leader needs them the most.

In addition to support for programs, many incoming leaders detailed the hostile environment and unrealistic nature of the executive director role and highlighted the need for – or having benefited from – support for their own care and development. The form of this support may be coaching, training, or cohort-based work, and may address day-to-day practical skills and/or the self-awareness and personal practices that make it possible for leaders to keep perspective and avoid burning out. Many leaders pointed to the need for support of this nature not just for themselves, but for additional staff – both to strengthen the organization and to cultivate additional leadership for the future.

As noted in [Making and Taking Space](#), it is common for new leaders of color to be expected to solve all of the organization's racial justice problems just by virtue of being a leader of color. Diversity, equity, inclusion, access, and justice work is specialized work that is ongoing and intensive, and requires dedicated attention. Failing to support this work perpetuates inequity by overburdening the leader of color, as well as failing to create a real pathway for addressing the issues throughout the organization. Funds are also often needed to adjust pay scales to make them more equitable or simply more livable.

Finally, transitions are a time of uncertainty which brings added stress upon staff. Many of the BIPOC leaders we heard from pointed to the need for facilitated space and time for staff to healthily process whatever dynamics arose around the white leader's departure and the way the board handled the transition, in order to equip them to fully engage in the work under new leadership.

Taken in sum, these dimensions require the support of substantial funding. No two organizations will have the same needs, and each organization knows best what it needs.

## Remember that getting it wrong compromises grantees' work and the communities they serve

Program officers often fall victim to the notion that investing in organizational transitions at the level described above is somehow a distraction from the work that needs to be done “in the world.”

This false binary obscures the extent of the damage done when a transition is so insufficiently supported that a new leader feels they have no choice but to leave because it's impossible to hold the job and maintain a basic level of health and well-being. Leaders get diverted, sometimes to other sectors. Organizations are forced to go through another period of transition without a director well-positioned to steward through, and ultimately the community served by the organization bears the greatest brunt of the impact.



Many participants noted that their personal connection to the community and mission of the organization was the one thing that kept them in a very unsustainable role. When unsustainable conditions force the leaders with those links to leave, that rupture is not easily repaired.

“ This is the kind of stuff that happens and [BIPOC leaders] burn out. They're out of there. They sizzle out and they leave with a bad taste in their mouth...They leave...and that, by the way, is not good for the community. The community pays for that. For bad practices, the community always pays.”

“ I see in my own kind of network, folks really...making it 24 months and not sure if they're gonna make it to...36 months. And when we're talking about tenure ... it's destabilizing to the communities that we're serving.”

## For Organizations Considering Transition

### Meet baseline prerequisites

These elements, if not clarified at the onset of a transition, have great potential to tokenize and doom the success of the incoming BIPOC leader.

1. The board and the staff must have a clear sense of the competencies that it needs from the next executive director.

Lack of clarity around this feeds the tendency to tokenize the new leader. Tokenization, accompanied by intentional or unintentional undermining and disrespect after entering the role, was the most frequent experience that participants shared. Failure to be clear sets up an environment for bias in evaluation to crop up later, and the supposition that the board might not need to explicitly articulate these competencies plays into the notion that the incoming BIPOC leader is magical, and not human, and that just by their mere presence and identity they will be able to solve all the organization's problems, including ones related to racial equity.

2. The board and staff must have clarity around why they are seeking a BIPOC leader, as well as some sense of their own implicit biases. DEIAJ training and ongoing internal organizational work best supports this goal, in addition to which specialized work around hiring is ideal.

Boards need a lot more leadership training on what it means to support a leader, especially a leader of color, during this time...[T]hey also need to...not just hire because they check a couple of boxes. They need to be looking for...the competencies that they want. ...When boards are looking... just to fill that slot, they are thinking “she's smart enough” or “she seems competent enough” – but I can't hire a white person.

3. The board is clear on the ways its role expands during the time of transition, and at which point its role will revert back to the organizational baseline.

Often organizations initiate transition activities with a sense of perceived crisis. This sense of urgency may make it appear impossible to take additional steps at gaining clarity, let alone engaging in training or collective activities that are not already underway. Nevertheless, simply taking the time to think through and articulate in writing the answers to these three questions can go a long way in surfacing insufficient understanding or differences in perspectives before the organization is at a juncture for it to cause harm to a BIPOC candidate or incoming leader.

### Create, share, and follow a clear transition plan

Once underlying motivations and roles have been clarified, a transition plan is the tool that will create a pathway for the intentions that have been identified, and become a vehicle for shoring up the organization as well as garnering the support needed to carry it out. A transition plan provides for transparency about the process and timeline, while designing for meaningful stakeholder participation from the very beginning.

It's important to acknowledge that planning for transitions is hard. There are many resources that are available to support organizations, including specific coaching on how to plan and execute a transition, and a range of consultants that can address the training and facilitation of the collaborative needs of the organization. Seek out and utilize the help you need to be successful.



## Essential for Boards

### Make a grounded assessment of the organization, its culture, and its ability to fully support a BIPOC leader; outline concrete steps to address challenges

As part of preparing a transition plan, the board should do an analysis of strengths, weaknesses, opportunities, and threats and should specifically consider whether their organizational culture prepares them to support the success of an incoming BIPOC leader. To acquire an accurate perspective, boards should engage staff and funders in conversation. Most organizations would benefit from external assistance to do this reflection, and if there are major organizational shortcomings, they should consider what the work to shift culture and prepare the organization could look like - and incorporate it into the transition plan.

### Be transparent about the challenges facing the organization

To have the greatest chance at success, an incoming director should be clear-eyed about the situation into which they are entering. It is critical that boards make substantial effort to accurately understand the conditions, and as part of the hiring committee, to be very forthcoming about the challenges a new leader will face. As the hiring process advances, additional information can be disclosed to final candidates, including by creating opportunities for the potential leader to gain more in-depth perspectives from a wider set of stakeholders. No nonprofit professional will expect the situation to be perfect, but the incoming leader deserves transparency about the nature of the challenges they will be tackling.

### Execute a documented, intentional search process

In order to find the best new leader, intentionality and transparency are necessary at the recruitment, evaluation, and decision stages of the process.

Participants detailed an unusual number of instances where they were informally invited into the role – meaning that the process lacked the typical steps of a search, mutually exploratory interview, formal evaluation, and a clear decision-making process by the board or hiring committee. Unsurprisingly, these abbreviated processes did not support alignment of goals and expectations between the board and the incoming director. To identify the right person and create an environment for success, informal hires should no longer take place.

A good search is robust. To attract a strong pool of BIPOC leaders, recruitment should include affirmatively reaching out to BIPOC leaders personally. Many participants expressed the reservations they had about taking on a director role before accepting a position, and a key influencing factor had been the specific recruitment by a personal connection to the organization.

To reduce bias, to get a broader range of perspectives, and – oftentimes – a more diverse set of decision-makers, the hiring committee should include staff and community members. This committee can also serve to steward the transition before and after the hiring process.

"It seems really clear that there's an idea that "I only want a Black person in this role but whoever we get is probably going to be a little lesser"... The reality is ...we can't cure biases. But people should own their biases. And then you would know, "it's bias, and I need to act differently."

### Reach a clear, fair, written agreement grounded in equity principles

A fair agreement is rooted in allowing for mutual decision-making between parties who are on an equal level of information access. To achieve this, the board should disclose its bylaws to final candidates. Board bylaws describe the processes and particularities of a BIPOC candidate's potential employer, and can reveal important information that would have bearing on a candidate's powers or limitations upon taking on the director role.

To guard against unfair salary offers, boards should engage in a benchmarking process that not only assesses compensation levels for other directors of similarly sized organizations, but also attempts to take into account the differences in wealth, debt, class, and care obligations that many BIPOC leaders experience. These differences can be specific to the outgoing leader; for example, some participants noted that their predecessors were independently wealthy and could therefore afford to accept a salary that was well below market rate, obviously an inappropriate basis for formulating the salary of the next leader, especially if they are BIPOC. But these differences are also structural, and offers, whenever possible, should attempt to affirmatively redress them.

Compensation speaks especially to the racialized power differentials that leaders experienced with boards. A surprising majority of participants did not effectively negotiate their salaries or didn't attempt to negotiate their salaries at all. If they felt the starting salary was low, many of them entered into verbal agreements with the board about why and at what point compensation would be adjusted. When the time came to have



those conversations, at worst, it appeared that many of the initial verbal commitments had evaporated, or at best, there were differing recollections of the agreement and the intentions and conditions that supported them.

Given this, a written contract or employment agreement allows for clearer understanding by both parties – and can include a variety of employment terms. Future salary considerations, including timeline, reasons, and process are particularly important to record, as are the provisions for termination.

## Essential for the Outgoing Leader

It's part of a director's job to support and create space for new and expanded leadership, and one of the greatest acts of organizational leadership is strong support of an excellent transition. Outgoing EDs can make or break what happens, especially because of the level of influence many EDs have over their boards.

I can't think of examples [where] EDs can't get what they want out of their boards. ...if an outgoing ED says, 'If you want to have a smooth transition on the next round, you need to do these things,...these are the things I think we need to do in service of setting up the next person for success, I think [the outgoing ED] does hold a lot of power in that board relationship. ...For the most part board members don't understand what we do, they only accept what...we tell them.

## Lean into the power of your role and use it to create a clear, collaborative process well in advance of a formal announcement

Stewarding a leadership transition is a project in and of itself, and the best transitions we heard about involved directors who accepted this reality and treated it as such. They intentionally planned a multi-phase process with other organizational stakeholders and funders, and did not engage in magical thinking about how long it would take. Planning a transition for a year before the official announcement of the outgoing leader stepping down is a good benchmark, and the examples of great transitions that participants shared took eighteen months to two years.

## Fundraise to support the full cost of the transition

An intentional transition plan often has four phases of work: 1) Foundational Planning 2) Internal Planning and Board Development 3) Executive Search and Hiring and 4) Transition, carried out over two years. It is unrealistic to expect these efforts to be done robustly if they are only supported by existing operating funds. Careful planning goes hand in hand with targeted fundraising, and garnering the buy-in of your funders also sets up the incoming director to more seamlessly settle into those relationships.

## Transfer key organizational relationships, especially with funders

Transferring relationships involves more than an email introduction on a director's last day. Truly recognizing that relationships need time and attention to flourish, and mapping out which ones will benefit from extra support, can very much ease the burdens experienced by the incoming director. Looking at existing relationships and making extra effort where the outgoing director may enjoy the privilege of having a shared background, community, or other identity with a funder or partner is a way to affirmatively counter exiting director privilege and potential donor bias.

"My predecessor...made me a comprehensive binder of documents and we had dedicated onboarding sessions every week. She made extensive notes about all of our funders and made introductions to all of them. It was intense to have so many meetings with funders, but it was very helpful to have a warm handoff."

## Document and share systems, policies, and processes

Part of leaning into the transition means doing everything reasonably possible to document the status of ongoing work and to close open questions. This ranges from the large to the small – whether it is making sure that policies are written out and easily located or updating job descriptions to reflect the current reality of the organization. Closing out open conversations and questions before the incoming director enters can go a long way toward allowing that leader the space to focus on the big picture and their learning curve. It also minimizes questions of authority because there is a tendency for outgoing directors involved in ongoing work to want to continue their role toward the end, which can be confusing and problematic for the incoming director. Part and parcel to this is detailing existing systems and important information in a comprehensive exit memo.



## Place a clear boundary on the exit timeline; then let go and leave

Lack of a clear exit role and timeline can be extraordinarily damaging to the organization and the incoming director. Regardless of how good the relationship between the incoming and outgoing director is, there's no way for the incoming director to fully step into their role when the outgoing director has an official relationship to the organization – and even less so when there is an ambiguous unofficial relationship. And if the relationships are fraught, it's even worse. At the same time, leaving quickly and without being intentional also complicates matters, and should be avoided, when possible. Periods of overlap and/or consulting often make sense, especially when the planning period was condensed. The role of the exiting director during such time should be clearly defined, and the timeline should be unambiguous. And when the agreed-upon period comes to a close, the exiting director should exit entirely.

“[There should be a] clear, coherent and transparent transfer of knowledge and relationships. Then get out of the way, commit to a clean exit plan. My predecessor stayed on as a consultant but we were lax about the transition and things got messy. There were lots of weird feelings and some confusion about her role. It ... added...stress.”

## Toward Transformative Leadership and Transforming the Sector

The work that incoming leaders described largely aims beyond meeting the short term goals of their organization as envisioned by the previous leader, and extends to enacting practices that can transform the sector as a whole. Some of the experiences and recommendations we heard point to this transformed future.

### Invest in collective spaces for BIPOC leaders to grow and gain support

Unsurprisingly, participants varied in the specific features they identified that were or would have been the most supportive in their transition, due to the particularities of their organizational situations. But one type of support was commonly named as critical to leaders' professional and personal wellbeing during this time: being part of a community of other BIPOC leaders seeking to align organizational practices with their vision of a just society.

Many participants had access to some type of coaching or leadership fellowship in the early days of their transition. For many, this support was pivotal. In other situations, this “support” was not chosen by the new leader but imposed by a board member or funder, and therefore created an additional burden. What stood out – both from the experiences of participants and the response to the community that this project created – was the incomparable value of having the time, space, and connection to a community of BIPOC stepping into organizational leadership with the goal of leading in a transformative way.

Exclusively providing individualistic approaches to capacity enhancement will tend to support the laborious elements of being a director, but won't lead to creating the conditions for flourishing BIPOC *leadership*. This distinction was a prominent theme, with participants feeling as though many organizations brought them on to work extraordinarily hard under unsustainable conditions, but were not truly interested in supporting the exercise of their leadership in the role, especially as they sought to enact change in the organization.

Participants described the kinds of spaces vital to capacity enhancement as ones that provide support for leading authentically, in sustainable ways that allow for leaders to bring their whole talents and selves into the work. Features of these holistic spaces include community-building for support, collective problem-solving, healing, and connection with other BIPOC leaders in a cohort that aims for transformative leadership, as well as individual and collective time for visioning.

Cohort-based, holistic, community spaces can play a major role in developing the leadership of aspiring and new first-time directors. Peer mentorship can support the decision-making process, helping candidates to dig deep into questions during the interview process, and to spot red flags, as well as continue to support them when they take on a role. Facilitating BIPOC leaders to better exercise their own power and judgment in considering their roles can lead to a better working environment and greater longevity in the role.

### Innovate and share new models for nonprofit structures and roles

Many participants described the role of a director as unrealistic, immensely stressful, and unsustainable - in essence, a terrible job. Lived experiences in the role and knowledge of others' experiences is driving talented BIPOC leaders away from the sector. To attract and retain BIPOC leaders – and to truly advance social justice – the nonprofit model must evolve.



A co-director leadership model is becoming more common, but still is very much the exception rather than the rule. This model acknowledges that the job description that most single directors are tasked with is impossible for one person to do alone. It also provides a level of support between directors that reduces the burden of having to carry an entire organization alone. Co-directorships also begin to challenge the notion that hierarchical leadership is the best way to live into an organization's mission.

I would not have applied if it was just an ED/CEO/director role because I had not seen - I didn't have any personal experience seeing - happy executive directors, and I had no interest in doing that... and so the co-ED part was the reason why I decided to apply.

Another way to create more space for BIPOC directors to exercise leadership would be to remove or dramatically reduce administrative functions from the director role. This could be done by outsourcing these functions, having more internal support from adequately funded other staff, and/or by those who impose the burden in the first place lowering requirements. The high administrative burden is a function of bureaucratic and other barriers in the sector that have roots in a notion of charity for the “deserving” – a paternalistic approach that still implicitly dehumanizes some and reinforces hierarchies, instead of embracing the inherent dignity of all and adopting systems designed to tap the power of connection and interdependence.

The mismatch of a corporate structure imposed upon a mission-driven organization was almost universally identified and lamented. Participants envisioned and are experimenting with different types of advisory boards and stakeholder committees, as well as more democratic approaches to governance. Overall, participants are challenging the sector to innovate structures that do not replicate dominance culture and better support the flourishing of BIPOC leadership.

### **Create conditions for broader sectoral shift**

While representation is critically important, alone it is insufficient for transforming our organizations to transform our society. Shedding old practices and unlearning cultural norms only happens with ongoing focused attention. To envision and experiment with new structures and practices, there needs to be a more widespread understanding – and embrace – of the concept of transformative leadership across all actors in the nonprofit ecosystem.

To get to widespread understanding, the field of practitioners engaged in praxis and reflection needs to be better funded, so that leaders can document and convene to collectively reflect on their experiences and share their knowledge.

Philanthropic entities need to be organized so that their institutions can incorporate that knowledge and shift their practices to support transformative leadership at the organizational level. Similarly, board members and advisors need to understand what transformative leadership means in order to be partners in re-envisioning their roles and qualifications.

Heeding the experience and insight of BIPOC leaders who have brought their leadership to organizations previously led by white leaders, and the recommendations they have set forth here, will go a long way in laying the groundwork for transformative change.



# Conclusion

For years, BIPOC leaders have endured the consequences of organizational missteps, planning failures, and many, many manifestations of racism and white supremacy. Nevertheless, they have developed strategies to succeed, to build power alongside their communities, and to shift the sector toward social justice, far too often at immense personal cost. This work has attempted to accurately convey the reflections, analysis, and vision of BIPOC leaders from a range of sectors and at various stages of their careers from across the country. Their recommendations hold tremendous promise for transforming the quality and impact of leadership transitions and for how social change work is done overall.

Of course, our time together was limited and did not permit full discussion of some important questions raised in our conversations.

In terms of the structure of transitions, several participants had been interim executive directors before taking on the executive role more permanently. We were not able to fully investigate the dynamics involved in these processes. We also were not able to explore the potential for the interim executive director model for implementing some of the preparatory work that would support organizations considering a more transformative trajectory.

There is also a need to better understand the role of transition consultants and recruiters and the practices they can adopt to support the full flourishing of BIPOC leaders and the health of organizations. Most of the leaders we spoke with were recruited by white people affiliated with the organization in some way, suggesting that white people continue to act as formal or informal gatekeepers. Those leaders who were recruited by other BIPOC connectors reported strongly positive experiences.

There are many questions related to gender - and its intersectionality with race - to which our conversations only provided a partial view. The lack of men's participation in these conversations is particularly striking. What don't we know about BIPOC men's experiences due to their absence? Furthermore, leaders had specific examples of the ways that gender structures these transitions: assumed relationships of care and connection to community, expectations about the scope of the work, and the kinds of support that was offered or denied. However, these examples were often not explicitly identified as ways leaders experienced gender dynamics in their transition. While some leaders framed some of

their experiences in terms of intersectionality, few mentioned specifically how they were experiencing gender dynamics in their transitions. At the same time, several leaders gave specific examples of harm enacted by white women in their work. It's possible that this ongoing and repeated harm muddles a deeper conversation about gender in leadership transitions. There's much more to be explored here.

That BIPOC leaders continue to strategize and innovate amidst the uncertainty of organizational transition, broad sectoral change, and societal tumult is a testament to their brilliance. Regardless of role, all actors in the sector have something to contribute to making these transitions better, and should enthusiastically accept the responsibility to do so.





ROBERT  
STERLING  
CLARK  
**FOUNDATION**