

Successful Leadership Transitions

Learnings shared by: Marcus Pope, Ambar Cristina
Hanson, Wokie Weah, and Donna Dalton



Scary Fact

Does the foundation have a CEO succession plan? (n = 388)

● NO	74%
● YES	22%
● UNSURE	4%



Conversations to hold us together



1. What brought you to this session?
1. How are **you, your board** and **your organization** thinking about transition?
1. Do you have a succession plan in place?
If so, do you have confidence in it?
 - Is it reasonable and actionable?
 - Who initiated the plan?
 - How does the plan have proximity to community?If not, what are the barriers?

3 Components of Transition



- Preparation
- Action/Implementation
- Onboarding



Youthprise Leadership Transition Plan

Quarter 1	Quarter 2	Quarter 3	Quarter 4
Key Transition Activities	Key Transition Activities	Key Transition Activities	Key Transition Activities
CEO transition announcement is disseminated by Wokie via email to key stakeholders and through Youthprise email list and social media channels	Marcus steps into the day-to-day operational leadership role for Youthprise, with Wokie focused on outreach and documenting institutional memory	Marcus continues to oversee major day-to-day operations for Youthprise, Wokie continues outreach and documentation.	Marcus firmly positioned in leadership role, managing day-to-day operations and serving as face of Youthprise. Additional external announcement regarding the CEO transition.
Wokie leads staff retreat planning, working closely with Marcus to integrate program alignment strategies connected to his vision	Wokie leads documenting Youthprise history for 10 year anniversary, Marcus supports as needed	Wokie continues to lead Youthprise 10 year anniversary documenting process, Marcus supports as needed	Wokie is focused on Executive legacy considerations, including 10 year anniversary culminating activities
Wokie works closely with board co-chairs to plan and execute annual meeting and board retreat, with Marcus playing an active role	Wokie continues to serve as a liaison with national partners Every Hour Counts (EHC), Grantmakers Forum for Education and Forum for Youth Investment.	Marcus will lead and manage all partnerships, including national partnerships. Wokie will support national relationship building.	Marcus will lead and manage all partnerships, including national partnerships. Wokie will support national relationship building.
Wokie, Marcus and Executive Committee work to negotiate continuation funding with major supporters	Wokie and Marcus participate in the EHC national summit. Wokie supports Marcus with staff integration and alignment of work across departments	Marcus will lead and make final decisions in the 2022 budgeting process. Wokie provides support and guidance where necessary.	Wokie, Marcus and Communication Team release academic research report/video documenting Youthprise's journey to Equity and Vision for the Future
Wokie supports Marcus in building stronger relationships with national partners, including Every Hour Counts	Wokie supports Marcus in communicating with key donors related leadership transition	Marcus works with the board and a staff team to plan Wokie's internal and external retirement acknowledgement/celebration	Marcus oversees celebration of Wokie's tenure as CEO internally and externally
Wokie, Marcus, the Board and Youthprise leadership team work to operationalize the Sustainability Plan	Continue to execute timeline and deliverables associated with the Sustainability Plan	Continue to execute timeline and deliverables associated with the Sustainability Plan	Continue to execute timeline and deliverables associated with the Sustainability Plan

To add more Activities, insert new rows above this line

Action/
Implementation

Board

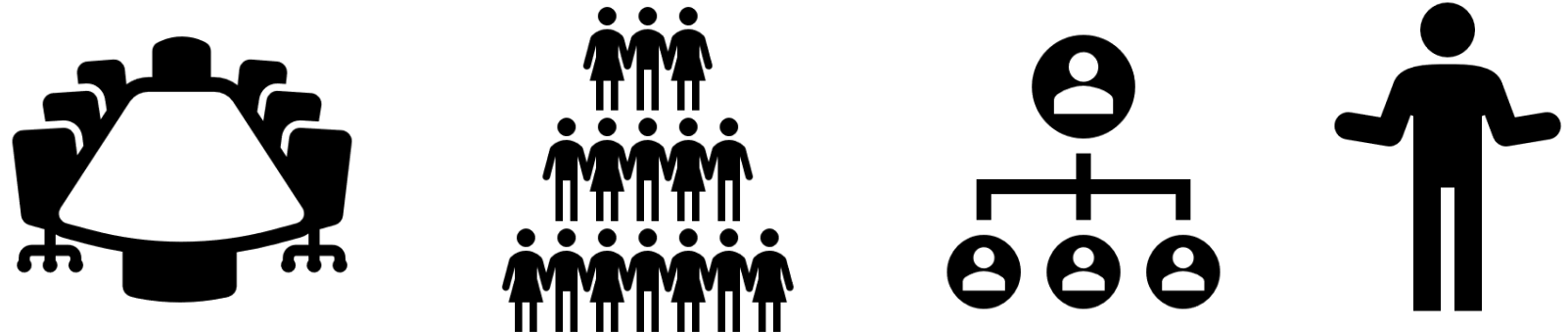
Organization

Current Leader

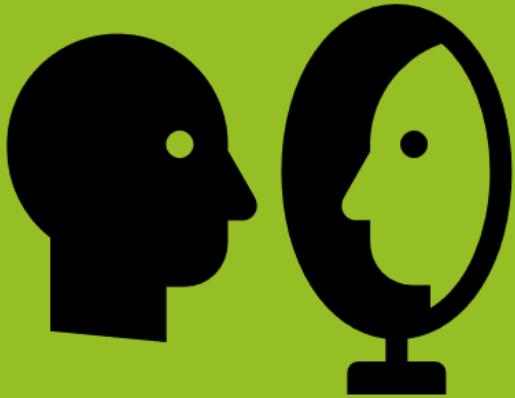
New Leader

In 2021, the Council on Foundations found that only 12.1 percent of leadership roles at foundations were filled by people of color.

Source: [*Stanford Social Innovation Review: What Everyone Can Learn From Leaders of Color*](#)



Reflection



“In the experience of myself, I would be wise if I were a great scholar.”

French Philosopher Montagne

- How has your experiences prepared you for this moment?
- Share one thing you are going to commit to bring about transformational sustainable change and improve opportunities for BIPOC philanthropic leaders

Onboarding/
Offboarding

New Leader

Organization

Board

Current Leader

*If you do not change direction, you may
end up where you are heading.*

Lao Tzu



Questions for the Panel



Resources

What Everyone Can Learn From Leaders of Color Stanford Social Innovation Review, Darren Isom, Cora Daniels & Britt Savage

Chief Executives as Artful Jugglers Center for Effective Philanthropy, FayFou Twersky

What Does an Equitable Executive Leadership Transition Look Like: Nonprofit Quarterly, Cyndi Saurez (appearing on Race to Lead website)

Will we get there hire by hire? CompassPoint, Jeanne Bell, Paola Cubías, and Byron Johnson

Shared Decision Making for Nonprofit Governance: Ignite NPS, Heather Graham and Linda Mollenhauer

Five Insights From Directors Sharing Power CompassPoint, Jeanne Bell, Paola Cubías, and Byron Johnson