

Hewlett Foundation Education Cohort on Leadership Transitions

LEARNING MEMO

Phase I: Opportunities from the
Discovery and Exploration Phase
(November 2022-March 2023)



**Leadership
Learning
Community**

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ABOUT LEADERSHIP LEARNING COMMUNITY

Leadership Learning Community (LLC) is a national organization and network of changemakers. We invite leaders, particularly those from historically excluded communities like Black, Indigenous, immigrant, people of color, LGBTQIA+, and people with disabilities, to live out the compelling vision of liberation - one which seeks power, joy, and thriving for all people. To do this, we facilitate and encourage unlearning oppressive structures, engaging communities of practice that create new cultural norms, and the development of tools and frameworks that allow us to align our values and actions. Together, we create spaces for leaders to run, fund, and study practices rooted in collective liberation (rather than systemic oppression). We call this liberatory leadership.

CONTEXT

The purpose of this memo is to share learning and opportunities identified from the discovery and exploration phase of the 2023 Hewlett Education Cohort on Leadership Transitions (funded by Hewlett Foundation in November 2022-December 2023) to create a learning community of support for a group of nine education organizations experiencing or interested in leadership transitions.

This memo is a distillation of lessons and reflections from project research, launch, kick-off, and feedback from participants (November 2022 - March 2023). This is a companion piece to the Hewlett Education Cohort Participant's Guide, created and maintained by LLC, which provides a comprehensive overview of all cohort components and activities.

This synthesis reflects a moment in time. It is one of three learning memos scheduled during the 12 month initiative. These include:

First Synthesis: Opportunities from the discovery and exploration phase (May 2023)

Second Synthesis: Recommendations from learning circles and in-person convening (August 2023)

Third Synthesis: Calls to Action and a final summary from full program experience (December 2023)

Learnings and opportunities shared here remain exploratory and emergent. Data sources for this first summary include:

- Desk research and scans
- Pre-program survey of participants
- Kick off meetings with LLC Hewlett staff
- Participant 1:1 meetings with LLC Project leads
- Kick-off Learning Circles with participants

Primary Audience: The primary audience for this memo is leadership of Foundation and Boards. With multiple audiences for the Hewlett Education Cohort on Leadership Transitions learning community, we believe the Foundation and Boards have the most to gain from this memo. We hope and intend that participants will see themselves and their stories here; it will reflect their voices and inform leaders and foundations that directly benefit them (e.g. Expansive and ongoing funding to support executive transitions).

HOW IS THIS DIFFERENT?

As long as there are organizations with executive leaders, executive transitions will remain an important part of the nonprofit and philanthropic sector journey. In the early 2000s, the exit of the baby boom generation from nonprofit leadership prompted the field to develop a body of learning and resources about strategies for supporting successful transitions. We know a lot about executive transition best practices, like planning for executive transitions before a transition is announced, and the critical importance of engaging Boards. All still true. And this project/cohort is different in two ways:

- **Power and Equity in Executive Transitions:**

Current work on executive transitions needs to center equity, or explicitly name race and power dynamics present in executive transitions. Participants in this Hewlett Education executive transitions cohort are part of an ongoing generational shift in wealth and power and an intentional progressive sector effort to upend power patterns of race, gender, and age - from historically older, white, straight, male, wealthy leadership to future-focused, younger, non-traditional, BIPOC, non-binary, and community-raised leadership. BIPOC women leaders are filling roles that have been occupied (often) by white men. This power and equity dynamic is not always centered but is critical to executive transitions learning, and experience.

- **Embracing human messiness and emotions with compassion:**

LLC is proudly heart-centered and imperfect. LLC invites leaders - particularly those from historically excluded communities - to live out a vision of liberation: to experience power, joy, and thriving; to unlearn oppressive structures; and to create new cultural norms, including letting go of perfection as a goal. This liberatory leadership approach invites leaders to bring their whole human selves to the work, including heartbreak, anger, jealousy, love, and joy. In executive transitions, fear and grief can take center stage. However, they are not always welcomed, with compassion, to the conversation. This avoidance of emotion can turn potentially successful executive transitions into hurtful affairs, leaving outgoing Executive Directors (ED) feeling unseen, interim EDs

feeling insecure, staff feeling unmoored, and setting up a new, incoming ED for an even greater challenge. By centering our irrational human emotions, LLC will explore what is possible when leaders can bring their whole, messy, human selves to the executive transitions conversation.

THE LANDSCAPE OF THE WORK

Participants: Cohort participants represent a very wide range of organizational stages and individual profiles.

The organizations are all education innovators, working on open education resources, data, and knowledge sharing. They are not mainstream or direct-service and may fall between the cracks of typical foundation priorities. For some, Hewlett is their only foundation support, operating in a general climate of financial scarcity that exacerbates executive transition-specific stresses. Most employ between 5 and 20 people. Most are based in North America, with some global representation.

Participating Organizations and where their representative is based include:

- [BCcampus \(Canada\)](#)¹
- [Creative Commons \(USA\)](#)²
- [Education Writers Association \(USA\)](#)³
- [Educurious \(USA\)](#)⁴
- [Internationals Network \(USA\)](#)⁵
- [National Center for Learning Disabilities \(USA\)](#)⁶
- [Open Education Global \(Spain\)](#)⁷

¹ <https://bccampus.ca/>

² <https://creativecommons.org/>

³ <https://ewa.org/>

⁴ <https://educurious.org/>

⁵ <https://www.internationalsnetwork.org/>

⁶ <https://www.ncld.org/>

⁷ <https://www.oeglobal.org/>

- Open Education Network (USA)⁸
- The Rebus Foundation (Canada)⁹

The organizations are at different stages of their executive transitions; some have already hired new EDs, while others have not yet initiated a transition.

The cohort design recognizes multiple levels of impact (Individual, organizational, cohort/community, and field), requiring various entry points. For example:

- Coaching is intended to support individuals in their learning and leadership journeys. We believe this inner work is critical to transformation in organizations, the field, and beyond.
- Learning Action Funds are intended to support organizational learning and practice. Participants are encouraged to collaborate, supporting action within organizations and amongst cohort participants.
- Learning Circles (and the planned July in-person convening) are intended to support the cohort or the community in its reflection and learning and to strengthen a sense of peer support.

⁸ <https://open.umn.edu/oen>

⁹ <https://rebus.foundation/>

Interested in learning more?

Note: Some links are only accessible to participants

- Hewlett Education Cohort Participant's Guide (See Appendix A)
- Conscious Relationship agreements (See Appendix B)
- Padlet: a password-protected resource hub for participants that collects and shares practical, timely resources and reflections (See Appendix C)
- ChangeElemental on centering inner work¹⁰
- Coaching for Healing, Justice, and Liberation¹¹, and Belma Gonzalez¹² on a conscious relationship practice
- Video clips from Learning Circles, including the powerful March visit by death doula, Stephanie Yazgi.
 - Pt 1 (14 min): Introducing Stephanie, how she became a death doula, and the resources she shared.¹³
 - Pt 2 (8 min): About uncertainty and surrender, and how it can lead to openness.¹⁴
 - Pt 3 (8 min): On vulnerability, strength and rituals.

In LLC design decisions, a guiding principle (north star) is to liberate old leadership models and generate new ways of thinking and problem-solving. As an example, for the March 15 Learning Circle discussion of “Transitions,” LLC’s approach was to invite Stephanie Yazgi, a death doula, to share reflections on navigating change from a hospice perspective and new ways of thinking about transitions that allow us to grieve. Stephanie illuminated powerful and practical lessons for participants on grief, impermanence, and uncertainty cornerstones of executive transitions. This approach to transitions invites liminal, heart-centered thinking, which is not typically embraced in what we think of as a traditional “ professional” space.

As of March 31, 2023, individual participants in the cohort include outgoing leaders, newly hired leaders, interim leaders (existing staff who stepped up to fill the role), and current leaders considering transitions. Participants identified their titles as:

¹⁰ <https://changeelemental.org/centering-inner-work/>

¹¹ <https://healingjusticeliberation.org/>

¹² <https://bcoachingandconsulting.com/>

¹³ <https://bit.ly/hewlettpart1>

¹⁴ <https://bit.ly/hewlettpart2>

- 1 CEO
- 2 Executive Directors
- 3 New Executive Directors
- 1 past interim Co-Executive Director
- 1 past interim ED and current COO
- 2 Interim Executive Directors
- 1 Development Director

All of these individuals, regardless of role, share a strong desire for a support system and seek wisdom and support from peers facing similar transition challenges. This common ground is the glue that holds the cohort together. However, given a stated project goal of building a learning community, it is important to note that the diversity of organizational stages and individual roles may constrain the limits of community building.

Liberatory Design and Levels of Impact: The Education Cohort curriculum flow covers four critical executive transition topics (recruitment, boards, onboarding and offboarding, people, and organization). But LLC's approach to the design and implementation of the learning network is explicitly emergent and iterative to ensure offerings are tailored to meet participant needs as they arise. Activities are being co-created with participants, and the approach for responding to participant input and strengthening the community continues to emerge.

EMERGENT THEMES

Our research, cohort launch, and first-quarter circles have emphasized establishing a foundation for this work by creating a liberatory container - a safe, curious space built on vulnerability, emotional intelligence, and relationships. This approach has surfaced the themes outlined below -which have already been referenced in this memo- that will inform the next phases of the work.

1. Emotions in executive transitions are high, but they are only sometimes named or addressed directly.

- Grief, loss, anxiety, fear, anger, and insecurity—if not given space—will continue to pop up, like speed bumps that impede progress and may cause damage if you don't slow down.
- Organizational norms and cultures often do not give space for leaders to express their whole (heart) selves, including these emotions, in a "professional" setting.
- A supportive Board (i.e., incoming EDs can share fears and emotions) is critical, even more so than an engaged, outgoing ED.
- The emotional labor of holding and supporting staff while presenting oneself as a competent leader (everything is fine, everything will be OK) is exhausting and often overwhelming.
- For BIPOC leaders, the emotional labor implications are even stronger. A recent report, *Making (or Taking) Space: Initial Themes on Nonprofit Transitions from White to BIPOC Leaders*¹⁵, shares that US-based BIPOC EDs talk about being held to higher "professional standards," and BIPOC women frequently report that staff and occasionally peers demand high levels of emotional support. This adds to the emotional labor of being BIPOC in the US. Note: Non-US BIPOC leaders may have different experiences.

¹⁵ <https://buildingmovement.org/wp-content/uploads/2021/10/MakingOrTakingSpace.pdf>

2. Equity and Power Dynamics in executive transitions are front and center, though not always centered. Two scenarios include:

Incoming/Outgoing ED dynamics: Often, BIPOC womxn are hired to take over from long-term or founding EDs who are white men and may hold donor and board relationship strings.

- When these individuals interact, power, race, and gender dynamics influence the relationship, though they are not always acknowledged, resulting in awkward (at best) and unsafe (at worst) communications.
- Individuals are not always supported or equipped to have uncomfortable conversations; for example, an incoming ED may be unable (safety, risk) to call out(in) outgoing ED bad behavior and/or may be met with defensiveness or worse.

Internal interim EDs who are promoted from within, but only temporarily.

- Internal interim EDs are managing a power dynamic between the ghost of the former ED, the imaginary new ED, and the board.
- They are holding it down temporarily, but facing work that cannot always be patched temporarily. For example, imagine a newly appointed interim ED (temporarily promoted from within) being tasked with making permanent layoff decisions about their peers to close a budget gap.
- Returning to their prior positions can be bumpy: there can be a feeling of being taken advantage of and not valued, or they may feel continuously pulled into the ED role, even though there is a new ED on board.

3. Scarcity & Isolation: Organizational Development Challenges (not unique to executive transitions)

Organizations in this cohort have serious financial concerns they must be attentive to. Most participants are leading smaller organizations that fall under the radar of "mainstream" education funders and must manage important work in the context of scarce resources. Add to this an executive transition, and things get even more challenging. Executive transitions are

costly (e.g., Coaching for incoming and/or outgoing EDs, board support through search and difficult transition discussions, overlapping staff salaries for incoming/outgoing leaders, exit packages for beloved outgoing leaders, moving costs for incoming leaders, and more).

- Executive transitions are very time intensive. EDs are often tasked with designing and managing the many components of their own transition while leading the organization's day-to-day work. This additional demand contributes to additional stress. This creates a culture where even moments of celebration and success are overshadowed by a sense of impossible responsibility and fear of failure.
- There's a reason the expression "it's lonely at the top" was coined. Beyond executive transition (executive transitions) challenges, EDs often feel isolated. There is an eagerness for connection with others and a need for space to pause. One LLC team member reflected that while this learning community was explicitly designed to support transitions, the "learning circles feel like ED support circles" and are not always focused on transition.
- Given the centrality of relationships to any successful ED, managing a transition in a remote or hybrid work environment introduces additional complexities and challenges.

OPPORTUNITIES

While this memo captures preliminary learning, we want to share a few emergent learning edges and curiosities to explore in the coming months. This cohort is surfacing opportunities to:

1. **Building a new liberatory container for executive transitions** that centers equity, shares leadership, promotes new leadership models, and gets real with emotions.
 - *Succession is not a dirty word*¹⁶ - talk about it.
2. **Making a case for what we are learning that leaders in transition need. For example:**
 - Call to Action to philanthropy to help stabilize funding (invest in transitions, generously; provide general operating support and multi-year grants) especially when a transition is underway.
 - Fund/support/create time and space for leaders and organizations to pause and reflect on the individual and organizational journey. In a cohort setting, there is valuable support (validation) and an opportunity to share learning about each organization's unique executive transition journey.
 - Permission to slow down (in the form of abundant, liberated systems and spaces)
3. **Transforming our narrow definition of what is "professional."**
 - Invite "Courage of Heart" -the strength of vulnerability and heart-centered ways of being; create a place for ritual, grief, and impermanence.
 - Let go of the illusion of control; use disorientation as an opportunity to reorient and wonder (getting lost...to be found).
 - "Sometimes you hit what feels like a low. When there is no other strategy than just going with the flow and surrendering.... And eventually, that deep grief can lead to exploration,

¹⁶ <https://www.proinspire.org/succession-is-not-a-dirty-word/>

experimentation, and wonder. In that surrender, you are open to wonder."

- Cultivate presence - shift from "doing" to "being."
- Acknowledge fear and emotions (not common in most executive transitions analysis, planning, etc.); work with fear in a compassionate way VS "overcoming" fear.

APPENDIX A: PARTICIPANT'S GUIDE

Hewlett Education Cohort



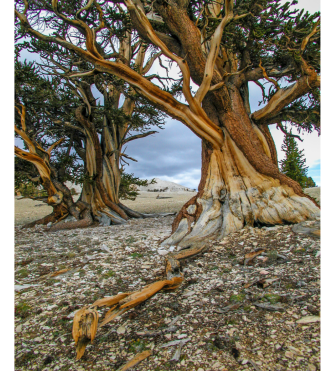
Participant's Guide

2022-2023

Purpose

The purpose of this learning community is to hold intentional space that encourages awareness, liberatory practices, collective learnings, and collaborative action

amongst a cohort of nonprofit partners to the Hewlett Foundation. Through their participation, nonprofit leaders will have clarity on what their needs are, will be connected to resources (e.g. people, tools and funding), and will be better prepared for leadership transition.



Participants

This cohort is open to participants of invited organizations who are interested in learning and sharing about leadership transitions. Leaders do not need to be actively involved in a transition to participate. Our current participants include:

[BCcampus](#)

[Creative Commons](#)

[Education Writers Association](#)

[Educurious](#)

[Internationals Network](#)

[National Center for Learning Disabilities](#)

[Open Education Global](#)

[Open Education Network](#)

[Rebus Foundation](#)

Poem

Change By [Wendy Videlock](#)

Change is the new,

improved

word for god,

lovely enough
to raise a song

or implicate

a sea of wrongs,
mighty enough,

like other gods,

to shelter,
bring together,

and estrange us.

Please, god,
we seem to say,

change us.



LEADERSHIP LEARNING
COMMUNITY

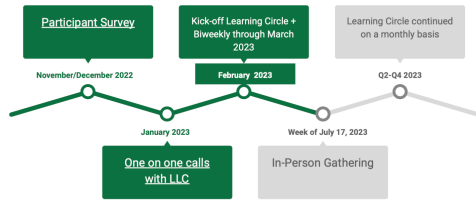
Leadership Learning is a national organization and network of changemakers. We invite leaders, particularly those from historically excluded communities like Black, Indigenous, immigrant, people of color, LGBTQIA+ and people with differing abilities, to live out the compelling vision of liberation - one which seeks power, joy, and thriving for all people. To do this, we facilitate and encourage the unlearning of oppressive structures, the engagement of communities of practice that creates new cultural norms, and the development of tools and frameworks that allows us to align our values and actions. Together, we create spaces for leaders to run, fund, and study practices that are rooted in collective liberation (rather than systemic oppression). We call this liberatory leadership.

Participation Information

A few early details about participation.

- **Duration:** ~One year commitment per organization
- **Honoraria:** \$12,000 usd per organization
- **Coaching:** In addition to the learning circle, participants will have access to 1:1 coaching with a coach of your choice or from our panel of coaches.
- **Travel expenses:** Will be reimbursed.
- **Learning Action Fund:** A total of \$36,000 will be available to the full group (or about \$4,000 per organization) to try on ideas or explore next steps.
- **Equity Fund:** We are reserving about \$10,000 of our budget for an equity fund. This recognizes that the ability to participate in meetings, travel and programming is not equal for everyone. It adds flexibility and access for individuals participating including, but not limited to, child care, special accommodations due to disability, mediation, additional coaching, stipends for outgoing leaders who are no longer employed with the organization (as needed), and specific support for Black, Indigenous and leaders of color based on life experiences such as trauma from racism.

Participant Timeline



Participant meeting schedule (tentative)

Kick-off: Wednesday, February 1, 2023 at 9:30am pt / 12:30pm et / 6:30 pm Madrid (90 min)

Q1 meetings: Bi-weekly on Wednesdays at 10am pt / 1pm et / 7pm Madrid (60 min)

- February 15, 2023
- March 1, 2023
- March 15, 2023
- March 29, 2023

In-Person meeting: Tuesday, July 18-Wednesday, July 19, 2023 from 9am-3:30pm

Q2-Q4 meetings: Third Wednesdays at 9am pt / 12pm et / 6pm Madrid

- April 19, 2023
- May 17, 2023
- June 21, 2023
- August 16, 2023
- September 20, 2023
- October 18, 2023
- November 15, 2023

Closing meeting: December 6, 2023 at 9:30am pt / 12:30pm et / 6:30pm Madrid (90 min)

Participant meeting schedule (tentative)

| Quarter | Date | Team | Topic |
|---------|-----------------------|-----------------|---|
| Q1 2023 | 2/1/2023 | Learning Circle | Kick-off (90 minutes) |
| Q1 2023 | 2/15/2023 | Learning Circle | Organizational Assessment |
| Q1 2023 | 3/1/2023 | Learning Circle | Organizational Assessment + Learning Action Fund |
| Q1 2023 | 3/15/2023 | Learning Circle | Guest Speaker: Learnings about transitions from a Death Doula |
| Q1 2023 | 3/29/2023 | Learning Circle | Boards |
| Q2 2023 | 4/19/2023 | Learning Circle | Equity and Transitions |
| Q2 2023 | 5/17/2023 | Learning Circle | Guest Speaker: the coach approach + peer coaching (120 minutes) |
| Q2 2023 | 6/21/2023 | Learning Circle | |
| Q3 2023 | 7/18/2023 - 7/19/2023 | Learning Circle | In person Convening |
| Q3 2023 | 8/16/2023 | Learning Circle | |
| Q3 2023 | 9/20/2023 | Learning Circle | |
| Q4 2023 | 10/18/2023 | Learning Circle | |
| Q4 2023 | 11/15/2023 | Learning Circle | |
| Q4 2023 | 12/6/2023 | Learning Circle | Closing meeting (90 minutes) |

APPENDIX B: CONSCIOUS RELATIONSHIP AGREEMENTS

Conscious Relationship Agreements

Any to add?

What is one agreement you will
be particularly mindful of today?

1. Practice giving and receiving trust.
2. Practice non-judgment. Be curious.
3. Practice being open, honest and direct in questions and discussions.
4. Confidentiality: What's learned here, leaves here. What's said here, stays here.
5. Remember gratitude and experience joy while together.
6. Make space, take space. Be aware of your identities, the privilege they hold and use that to balance your participation.
7. Practice being a witness to others transformation verses being submerged or blended with it energetically.
8. Expect and accept a lack of closure.

APPENDIX C: PADLET

Padlet

JOY at LLC + 2 • 8d

Education Cohort 2023

Space for resources and reflections

Kick-Off (2/1/2023) Board Leadership, People and Care Organization Offboarding; Succession Planning

Participant's Guide
Hewlett Education Cohort . Participant's Guide
Add comment

3/29/2023 slide deck on boards
Boards: 3/29/2023
Add comment

3/15/2023 Wisdom on Change from Stephanie Yazgi
WISDOM ON CHANGE from death and grief
PDF: WISDOM_ON_CHANGE_llc_031523
Add comment

2/15/2023 slide deck on organizational assessment
Organizational Asse
Understanding where our organizati
Add comment

A founder's perspective on succession planning
GREATNONPROFITS 2018 TOP-RATED NONPROFIT
proinspire.org
Succession is Not a Dirty Word - ProInspire
Add comment

Questionstorming
Nonprofit/charitable organization boards can have legal duties, advisory duties, or both. Defining their duties also defines how much you involve them in decisions and general oversight of the organization.

Recap
Nonprofit/charitable organization boards can have legal duties, advisory duties, or both. Defining their duties also defines how much you involve them in decisions and general oversight of the organization.

3/15/2023 circle recording
Video • 14:38

Learning Action Fund Form
Hewlett Education Cohort
Learning Action Fund Proposal
forms.gle