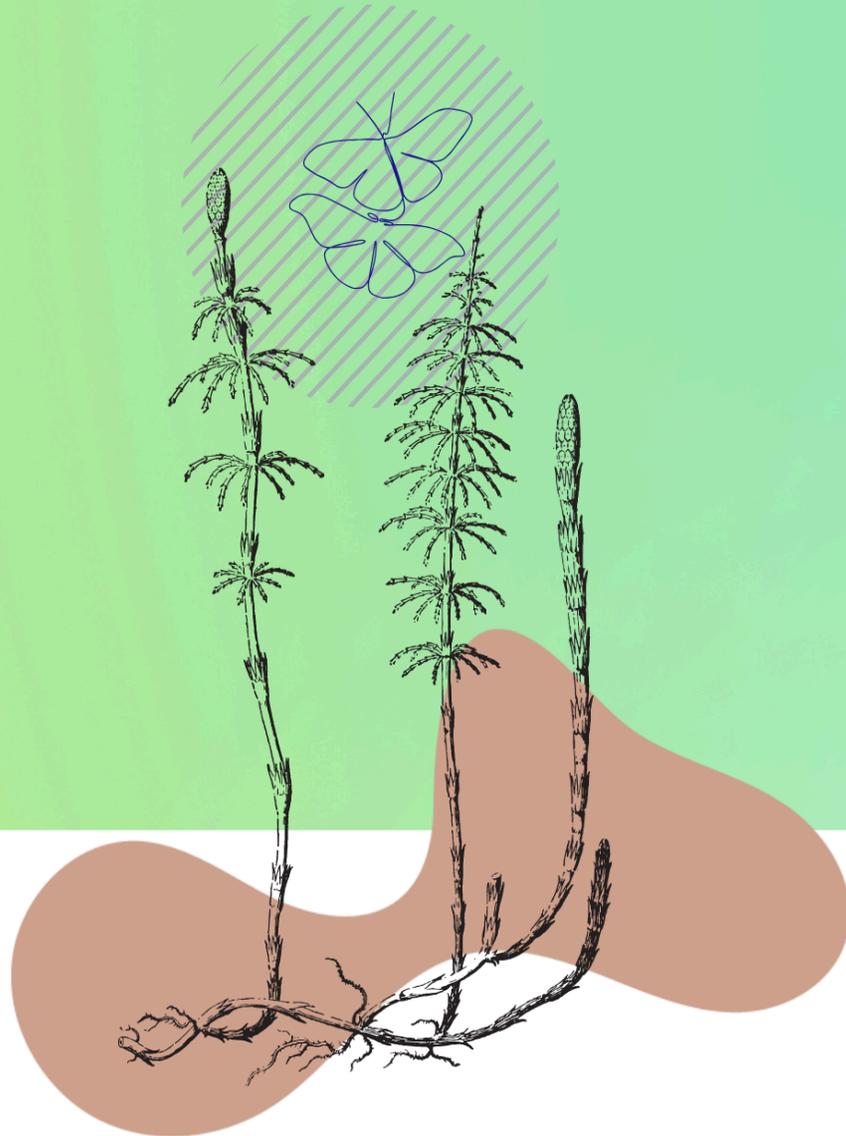


Hewlett Foundation Education Cohort on Leadership Transitions

LEARNING MEMO

Phase II: Learnings
(April 2023-August 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 continue to share learning and resources from participants in the 2023 Hewlett Education Cohort on Leadership Transitions (funded by Hewlett Foundation in November 2022-December 2023). It is a distillation of learning and content that has emerged during multiple virtual Learning Circles and one in-person convening. This memo is also intended to serve as a reference for cohort participants to be used as needed and read at your own pace. This second synthesis reflects a moment in time and is the second of three learning memos planned during the 12-month initiative. These include:

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

Second Synthesis: Learning from virtual circles and in-person convening (September 2023)

Third Synthesis: Calls to Action and a final summary from full program experience (April 2024)

Data sources for this second summary include:

- Notes and observations from monthly Learning Circles
- Notes and observations from the July 18-19, 2023 in-person convening
- Resources and ideas shared by participants (with permission)
- Resources and ideas shared by LLC
- Other communications between LLC and participants

Primary Audience: The primary audience for this memo are the current cohort participants: BCcampus, Creative Commons, Education Writers Association, Educurious, Internationals Network, National Center for Learning Disabilities, Open Education Network, and the Rebus Foundation. The secondary audience is the leadership of Foundation and Boards. With multiple audiences for the Hewlett Education Cohort on Leadership Transitions learning community, we believe it is most important to elevate the voices and learning of participants at this stage in the initiative. We hope and intend that participants will see themselves and their stories here while maintaining confidentiality and safety and that it will inform leaders and foundations that directly benefit them (e.g., Expansive and ongoing funding to support executive transitions).

THE LANDSCAPE OF THE WORK

We have learned that transitions within this transition cohort have been a dance, with participants coming and going during the first half of the year. Thanks to the grace of participants, in June, LLC confirmed that the people in this cohort at that juncture are the ones that will see it to completion in December 2023.

Participants in the cohort include outgoing leaders, newly hired leaders, interim leaders, and current leaders considering transitions. All of these individuals, regardless of role, share a strong desire for a support system and seek wisdom and support from peers facing similar leadership and transition challenges. In response, [Peer Coaching](#) was offered and emerged as an important tool during the in-person convening to surface “wicked” problems (e.g., challenges that require adaptive leadership and do not have one clear or right solution and benefit from input from trusted peers).

The program design also recognizes multiple levels of impact (Individual, organizational, cohort/community, and field) and offers participants a range of entry points. For example,

- **1:1 Coaching** supports participants in their learning and leadership journeys. This inner work is critical to liberatory executive transitions.
- **Learning Action Funds** are being applied to advance organizational learning and practice. Examples of use of funds (in development and progress) include:
 - Hiring a consultant for organizational development, culture change, conflict management, or strategic planning.
 - Consultants working with the board to support transition planning.
 - Workshops for staff and board on Design Thinking (Stanford).
 - Resources for Office Fun Day and Team Retreats.
- **Learning Circles** provide monthly participant touchpoints and support the cohort’s ongoing connection, reflection, and learning.
- **In-person convening** (July 18-19) powerfully strengthened relationships within the cohort and provided a forum for deepening trust and accelerating learning.

WEAVING IN EQUITY & LIBERATION

There are five executive transition themes that cohort participants surface again and again: (1) Boards, (2) Organizations, (3) Leadership/People, (4) Succession Planning/Offboarding, and (5) Onboarding/Recruitment. In addition, in this cohort, a critically important 6th element is embedded in everything: Equity and Liberation. While exploring executive transitions, LLC's liberatory approach consistently asks two questions:

1. How can this be easeful? When cohort participants click to join a monthly LLC learning circle on Zoom before they join the meeting, they first receive a surprising window on their screens: an invitation from LLC to pause, take a deep breath in and out, grab a snack, go to the bathroom; and permission to be a few minutes late. Across all conversations, participants in the LLC cohort are asked to:

- Slow down; create abundant, liberated systems and spaces.
- Invite in "Courage of Heart" -name 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).
- Cultivate presence - shift from "doing" to "being."
- Acknowledge fear and emotions; work with fear in a compassionate way (instead of trying to overcome fear).

2. Where and how are equity and liberation showing up? Participants in this cohort are part of an intentional progressive sector effort to upend power patterns of race, gender, age, and more. This power and equity dynamic is not always centered but is critical to executive transition learning and experience. Race and power are explicitly and intentionally named and explored in this cohort. LLC asks participants to:

- Examine personal identity and organizational culture as a portal to better understand race, gender, age, and other power dynamics in their organizational transitions. For example, one of the conscious relationship agreements is, "Make space, take space. Be aware of your identities, the privilege they hold, and use that to balance your participation."
- Practice engaging in uncomfortable conversations about race and power dynamics, strengthening skills to create safer spaces and communications with each other. LLC's facilitation style is often referred to as soft or adaptive. We have a gentle approach because we ask a lot of participants. Learnings of different perspectives, whether LLC's or a peer's, can be challenging, especially when it is so different from or even conflicting with our beliefs and understanding. In addition to our facilitation approach, we offer an equity fund to support fuller access to learnings, including coaching and healing when needed.

LEARNING THEMES

Since the cohort kicked off in January, valuable learning and resources have been generated and shared by participants and LLC across the five themes outlined as follows: [Boards](#), [Organizations](#), [Leadership, People, and Care](#), [Succession Planning and Offboarding](#), [Recruitment, Retention, and Onboarding](#), and [Equity and Liberation](#). Below, we distill key questions, learnings, and resources from virtual circles, in-person meetings, and emails.

We hope readers of this memo can use this section as a reference to come back to when you have issues and questions related to these themes. We hope you see that others have also asked honest questions, learned from this collective wisdom, and come up with your next steps with more ease.

BOARDS

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

Emergent Questions: How involved should a board be? How can an ED get a board more involved? These generic questions take on a different flavor in the context of an executive transition. ET-specific questions related to board management explored by participants include:

- What is a board's role in transition?
- How do you help board members feel valued during a transition?
- As a new ED, how much energy should I spend on fixing a "broken" board vs. building needed internal infrastructure and systems? Which comes first?
- How can a new ED best manage Board member transitions following a leadership transition, especially when the board is weak and disengaged?

Discussions, Learnings, and Tips:

- Everyone's board is different and can be approached in a multitude of ways depending on the organization's needs and culture. Understanding how to support volunteer board members includes understanding how best to leverage their skills and build relationships with individuals on the board, as well as providing opportunities for them to build relationships with each other. Likewise, how much a board can take on during or after a transition depends on what they are asked to do and what they are capable of doing.
- Start with understanding what kind of board structure you have and want to have:
 - Board of Directors (aka Fiduciary Boards and Governing Boards)
 - EDs might want to talk to a corporate attorney to understand the legal duties of a board if they are a registered charity or 501(c)(3) and require a board of directors.
 - For US-based nonprofits, here is information for the [board of directors](#) from the law firm Adler and Colvin that you can share with your board. This resource includes information on conflict of interest as well.
 - When engaging a Board of Directors, consider creating a dashboard with four areas: financial, programming, operations, and new product development to organize what is shared with the board regularly.
 - Advisory boards do not have legal duties. What they do for you is an agreement between your organization and them. Here's an [explanation of what advisory boards are](#) by Jan Masaoka. In addition, the NEO Law Group further explains [the difference between an advisory board and a board of directors here](#).
 - Sometimes, you have a version of both. A board that handles legal stuff but also helps you with fundraising and advice. In all cases, ensure you and your board are on the same page regarding their duties and your duties. If this is not spelled

out, this might be something you consider doing. Some folks are also [experimenting with different structures, as Vu Le shares here.](#)

- In board relationships and engagement - communication is key. Some tips shared include:
 - Get to role clarity. Who takes up this work? Is it the ED? The Board Chair? Clarifying this early on can be very useful to distribute the workload on small, overloaded teams.
 - Meet with board members on a 1:1 basis regularly (e.g., quarterly, every six months, or yearly). Try giving them a calendly link upfront if they are not responsive to emails.
 - Ask them what support they can offer as a board member.
 - Invite them as participants in the organization's events, such as relevant public engagements.
 - If board engagement and development compete with organizational infrastructure needs, an ED might consider prioritizing building needed internal organizational infrastructure before fixing or tending to the board.
- Board transitions often follow new leadership transitions. Tips shared:
 - Establish board terms, such as 2-year terms, with an option for them to stay on + sign a consent form confirming the same.
 - Consider having alternating terms, so you're never in a position to have to replace the entire board in one go but only have to do a handful of members at a time.
 - Invite new board members who have a specific skill that can support you.
 - Hire a board consultant. One resource is the [Board Source Consultant Director.](#)

Links to external board resources:

- What is an advisory board?
<https://blueavocado.org/board-of-directors/what-is-an-advisory-board-and-should-we-have-one/>
- Legal information on the duties of US-based nonprofit boards
<https://www.adlercolvin.com/what-every-nonprofit-board-member-should-know-2/>
- The default nonprofit board model is archaic and toxic; let's try some new models
<https://nonprofitaf.com/2020/07/the-default-nonprofit-board-model-is-archaic-and-toxic-lets-try-some-new-models/>
- Board's Role in Onboarding and Supporting New CEO
<https://www.bridgespan.org/insights/nonprofit-boards-role-in-onboarding-a-new-ceo>
- Board Source on executive transitions
<https://boardsource.org/fundamental-topics-of-nonprofit-board-service/executive-transition/>
- Racial Bias and Boards
https://www.philanthropy.com/article/low-paid-black-leader-who-turned-around-social-justice-nonprofit-resigns-alleging-racial-bias-from-the-board?cid=gen_sign_in
- Building Leaderful Organizations Report ("This report aims to provide nonprofit boards

and executive directors a framework for their own succession planning activities. It also includes resources to help your agency formulate succession plans, including checklists, questions for self-reflection, and guides with key concepts.”)

<https://www.aecf.org/resources/building-leaderful-organizations>

ORGANIZATIONS

Leadership transitions also imply that organizations are in transition. Regular organizational assessments help transitioning leaders and stakeholders understand where the organizations are today.

Emergent Questions: Understanding where an organization is at a given time allows leaders to lean into transparency and collaboration with staff and stakeholders.

- Who is currently leading the organization (e.g., outgoing ED, founder ED, internal interim ED, external interim ED, incoming ED)? Who has just led, and who will soon lead?
- What are the types of engagement that this transition includes? (e.g., start-up, turnaround, accelerated growth, realignment, sustaining success)
- What is the top challenge in the organization right now?
- What are the top opportunities for the organization?
- What is the top priority for the organization?

Discussions, Learnings, and Tips: Many organizations in this cohort identified as currently engaging in accelerated growth or sustaining success at the time of assessment. At the same time, there is a bit of engagement in each journey. Together, we reviewed and adapted the [STARS Framework by Michael D. Watkins](#):

1. **Start-up:** *Assembling the capabilities (people, budget, technology) to get a new program/department/organization off the ground.*

Challenges	Opportunities
<ul style="list-style-type: none">● Managing uncertainty.● Lack of clarity on goals.● Building the strategy and structuring systems from scratch without a clear framework or boundaries.● Recruiting and welding together a high-performance team.● Making do with limited resources.	<ul style="list-style-type: none">● You can take action right from the beginning.● People are energized by the possibilities.● There are no rigid preconceptions.● Space for organizational assessment and readiness.● Set short-term goals and priorities that are achievable.

2. **Turnaround:** *Saving a department or entire organization widely acknowledged to be in serious trouble.*

Challenges	Opportunities
<ul style="list-style-type: none"> ● Staff feel overwhelmed or frazzled due to many changes. ● Re-energizing demoralized staff and other stakeholders. ● Possible loss of institutional knowledge. ● Making effective decisions under time pressure. ● Going deep enough with painful cuts and difficult personnel choices. ● Confidence of management and/or key stakeholders is weak or declining because of one or more perceived unaddressed organizational challenges. ● Finding the right people for the right roles. ● Possibly no plans or tools for equity shifts within organizations. 	<ul style="list-style-type: none"> ● Everyone recognizes that change is necessary. ● Affected constituencies offer significant external support. ● A little success goes a long way. ● Prioritize transparency and communicate openly. ● Tapping into a broader community to support the work (e.g., partnering with other organizations). ● Restructuring the team and refocusing the organization.

3. **Accelerated Growth:** *Managing a rapidly expanding organization.*

Challenges	Opportunities
<ul style="list-style-type: none"> ● Board and/or staff not ready for pace of change. ● Staff may be stretched too thin. ● Putting in place structures and systems to permit scaling. 	<ul style="list-style-type: none"> ● The potential for growth helps to motivate people. ● People will be inclined to stretch themselves and those who work for them. ● Communicate honestly. ● Prioritize critical needs to address.

<ul style="list-style-type: none"> ● Integrating many new employees; hiring decisions (Staff + Consultants + Board). ● Making impactful decisions quickly. ● How to grow responsibly. ● Finding time to do important growth work while maintaining current services/offerings. 	<ul style="list-style-type: none"> ● Partner with the community and other organizations in the field - tap into the community working on the same goals.
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4. **Realignment:** *Re-energizing a previously successful organization that now faces problems.*

Challenges	Opportunities
<ul style="list-style-type: none"> ● Mixed communication from stakeholders - e.g., communication as an organization and government priorities might not be as aligned. ● Convincing staff that change is necessary. ● Carefully restructuring the top team and refocusing the organization. ● Managing uncertainty. ● Possibly no plans or tools for equity shifts within organizations. 	<ul style="list-style-type: none"> ● The organization has significant pockets of strength. ● People want to continue to see themselves as successful. ● Get back to primary values. ● Take the realignment and ask people to reimagine and bring forward new ideas. ● Over time, realignment is an opportunity to talk about the necessary evolution of an organization. Can we review again or update the mission and values, etc?

5. **Sustaining Success:** *Coming in on the heels of a highly regarded leader with a stellar record of accomplishment.*

Challenges	Opportunities
<ul style="list-style-type: none"> ● Living in the shadow of the former leader and managing their team. ● Understanding what decisions and strategies are appropriate to make/implement. 	<ul style="list-style-type: none"> ● A strong team may already be in place. ● People are motivated to continue their history of success. ● More access to institutional information.

- Finding ways to take the program to a new level.
- External expectations of what the organization should be doing.

- Relationship warm hand-offs.
- More manageable shifts for staff and team.
- A foundation for continued success may already be in place.

Links to external organization assessment resources:

- Organizational Self Assessment Tools
<https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments>
- The STARS Framework by Michael D. Watkins "Assessing the business situation that you've inherited (as an interim or new leader) as a start-up, turn-around, accelerated growth, realignment, or sustain success. And understanding strategies for change including turn-around and realignment."
<https://hbr.org/2009/01/picking-the-right-transition-strategy>
- The Evolution of Executive Transitions and Allied Practices by CompassPoint and Raffa "...attention to executive transitions has affirmed its importance and made compellingly clear that the path to sustained effective organizations is broader and more complex than simply the smooth transfer of the executive position from one person to another. The practice has evolved to include allied work in succession planning, leader development, and sustainability."
https://www.compasspoint.org/sites/default/files/documents/Executive_Transition.pdf
- Just for fun. LLC created a mini app through brancher.ai to generate a memo to your board based on the six data points you provide.
<https://app.brancher.ai/da2d7e26-b511-46e6-ab53-773a959be498>

LEADERSHIP, PEOPLE, AND CARE

Leadership is a site of transformation, and it can be a lonely job, as it requires caring for everyone: all of the board and staff. In a transition, you inherit a culture, and/but you get to change it as well. It is a process.

Emergent Questions:

- What does it mean to put caring for myself ahead of caring for the organization? How do I balance caring for myself with caring for others on the team? And why does it matter for myself and the organization's sustainability that I care for myself, too?
- What are the risks of tackling the "inherited" wicked interpersonal conflicts (among tenured staff) as a new leader? Who do I align with?

Discussions, Learnings, and Tips:

- In our [Phase 1 memo](#), LLC shared our learnings that transitions are emotional spaces, and while emotions are only sometimes named or addressed directly. For us, this was a charge to embrace human messiness and emotions with compassion.
- Excerpt from Phase 1 memo:

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*¹, 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.

¹ <https://buildingmovement.org/wp-content/uploads/2021/10/MakingOrTakingSpace.pdf>

- As mentioned earlier, [peer coaching](#) emerged as a way for leaders to deepen their relationship with each other and navigate adaptive challenges they were facing.
- For LLC, we held space in the most open, easeful, and liberatory ways we could while with participants. We purposely designed this project to have many entry points (e.g., coaching, learning action fund, virtual and in-person meetings), we invited feedback from participants in a December survey, in January through 1:1 meetings, in April through 1:1 meetings, and collectively at the in-person meeting, and we reflected back our learnings regularly through meeting recaptures and memos. Some other ways we held space include: We minimized paperwork when we could (e.g., paying set per diem rather than asking leaders to itemize and submit receipts for their emails and offered participation stipends as general operating grants). We also sought consent and invited collaboration in setting the in-person agenda on both days. Our facilitation team was open and ready to pivot to different ways forward depending on the participant's needs and interests. Lastly, we offered 1:1 consulting to participants.

Links to external leadership, people, and care resources:

- Wisdom on Change compiled by Death Doula Stephanie Yazgi
https://drive.google.com/file/d/1Yikw0NLWvsZQcm_XH0HuH89Bfmtk-ga3/view?usp=share_link
- Check-in question: Please share something, someone, or some practice who has supported you through this transition.
<https://www.callinginandup.org/pedagogy-guide/3-assembling-our-ride-or-die>
- Liberatory Leadership Partnership <https://www.liberatoryleadership.org/>
- Book recommendation:
<https://www.hup.harvard.edu/catalog.php?isbn=9780674027466>
- Book recommendation about when the bottom falls out.
<https://pemachodronfoundation.org/product/when-things-fall-apart-book/>
- How to make the most of your time on earth - from a death doula
<https://www.vox.com/even-better/23280546/end-of-life-doula-making-time-death>
- Navigating + Transitions + Love Letter from Wild Dreams (Ana Polanco) "Learnings from a coaching program. A great place for affirmations from leaders who have walked your journey."
https://drive.google.com/file/d/1DE2yVhZXf6j6V0d7mhXo2YqqzYEM7spM/view?usp=share_link

SUCCESSION PLANNING & OFFBOARDING

A key part of planning for an Executive Transition (ET) is communications: what to say, when, and to whom about an anticipated ET. This forces entering territory that feels risky.

Emergent questions:

- What do I need to figure out and/or put in place before communicating with others that I'm considering a transition?
- What point in the transition should I share further details with my staff?
- What is the best way to communicate with the board that I'm considering a transition? What is the right time to share with the staff that I'm considering a transition? How can I mitigate the risks to my reputation and relationships? At what point in the transition should I share further details with my staff?

Discussions, Learnings, and Tips:

- Overall, stay consistent with the organization's communication culture.
- Trust is key to informing timing and openness regarding communicating your transition. If the culture is built on trust, sharing early (before details and timelines are defined) can build even stronger trust. If the culture is low trust, waiting until departure dates are clearer can make sense.
- Communication regarding transitions is highly time-consuming for the outgoing ED and requires managing the emotions of one's self and those receiving the news.

Case study: "I'm ready to leave the organization. Who needs to know what and when?"

- Ideas:
 - Questions asked: How to share early with a team to build trust? How do we get the board engaged?
 - Start with sharing intentions for a transition with the board.
 - Begin the process of working with the board on a draft succession plan if there is yet to be one in place.
 - It can be helpful to communicate the intention to leave and the outline of the succession plan to staff before the succession plan is fully baked if there is trust. For example, sharing an overview of steps that the organization intends to take next, such as designing an actionable succession plan and search process, provides an opportunity to get staff reflections and input, helps finalize a succession plan, and can support board leadership on the recruitment and hiring process with a consultant and/or staff, etc.
 - Ready the organization for change management. Expect that additional organizational transitions will follow executive transitions.

Links to succession planning and offboarding resources:

- A founder's perspective on succession planning
<https://www.proinspire.org/succession-is-not-a-dirty-word/>
- Emergency Succession Plan:
<https://nonprofitaf.com/tag/emergency-succession-plan/>
- Succession Plan Example:
https://drive.google.com/file/d/1rwl28rDHZKldogdehiEVOP9wdigV9Vn3/view?usp=share_link

RECRUITMENT, RETENTION & ONBOARDING

Our focus so far has primarily been on onboarding. We hope to explore recruitment and retention in the final meetings of this cohort.

Recently, several cohort participants have either helped to onboard an incoming CEO or are themselves onboarding into new leadership roles. Too often, they encounter no transition plan in place, no documentation from previous leaders, and/or significant conflicts between staff. Determining what to prioritize and how to navigate these tricky waters has been a key area of exploration.

Emergent Questions:

- How do you keep the train moving while learning a new position and building new relationships?
- How do we navigate being a buffer between a problematic new CEO and the rest of the organization? What's good for you? ...for the organization? ...and at what cost?

Discussions, Learnings, and Tips:

- There is always more work for an ED to tackle than is humanly possible. Always. It is the nature of life and leadership. Look to your personal values to decide what is most important to focus on. What will bring you the most joy to accomplish? Put your energy there. Keep a running list of everything else.
- Get an external perspective whenever possible. When feeling stuck, turn to trusted peers for coaching on tackling an adaptive challenge with no clear solution.

Links to recruitment, retention and onboarding resources:

- What we are asking of BIPOC Leaders in these times
https://nonprofitquarterly.org/the-call-of-leadership-now-bipoc-leaders-in-a-sydem-ic-era/?mc_cid=4f02ecda8a&mc_eid=55cb4a5c5e
- Fundraising and leadership transitions
<https://nff.org/blog/price-nonprofit-leadership-transitions-managing-financial-health-through-change>
- Sabbaticals for BIPOC Leaders
<https://bipocedcoalitionwa.org/sabbaticals-for-bipoc-leaders-capacity-building-healing-renewal/#:~:text=Sabbaticals%20provide%20BIPOC%20nonprofit%20leaders,your%20own%20vitality%20and%20balance>
- Making Founder Successions Work
https://ssir.org/articles/entry/making_founder_successions_work

EQUITY AND LIBERATION

In our [first memo](#), we talked about how themes of equity were bubbling to the surface in our research, 1:1 meetings, and surveys. Not everything is about race equity. Some things are about good nonprofit management. Others are about disability and access. Many things are about joy and beauty as we progress in our missions. AND: We have to start talking about race equity and racial justice more explicitly.

Emergent Questions:

- How do we access funding to support work toward building a more inclusive organizational culture?
- Given that everybody has a different path to liberation, how do we incorporate liberatory practices into the organization's culture and processes?
- What funding support is available for hiring facilitators to come and assist with transitional work? Not only for staff but also for board work.
- How can boards (and others?) support a "first" BIPOC leader of color? ...especially when the board is mostly white...
- What are the best practices/ways of diversifying our advisory boards for projects that are often led by our government- which often leads to a lack of diversity on the advisory boards?
- Where/how have others prioritized equity in their transitions?
- How do we find time to do the real work of embedding equity in our practices (including transitions), given our meeting-heavy and profit-driven cultures?
- What is the organization's role in caring for the individual's healing?

Discussions, Learnings, and Tips:

- **Where to start?** Equity is a big topic and often intimidating because it asks of us for care and attention. Our learning is to start where the energy is, and start small. Build trust, build practice, and allow folx to sit with it. We expect multiple iterations of this conversation.
 - **Incorporate liberatory leadership.** This is our plug for outside-the-system thinking. [Here are some webinars that capture how folx are practicing liberatory, joyful, eco-centric leadership](#) as they are in pursuit of racial justice and collective liberation.
 - **Get familiar with the terms.** LLC often uses RaceForward's definitions of race equity and racial justice (this resource also shares definitions of diversity, inclusion, etc.)
 - Racial Justice is a vision and transformation of society to eliminate racial hierarchies and advance collective liberation, where Black, Indigenous, Latinx, Asian Americans, Native Hawaiians, and Pacific Islanders, in particular, have the dignity, resources, power, and self-determination to fully thrive.

- Racial equity is a process of eliminating racial disparities and improving outcomes for everyone. It is the intentional and continual practice of changing policies, practices, systems, and structures by prioritizing measurable change in the lives of people of color.
 - **Keep practicing and centering race equity and racial justice:** It will take more than one conversation, training, and time. This is a practice and not a destination. We're committed to continuing this conversation and practice with you.
 - Ericka Stallings shared her steps to applying a Liberatory Lens (Note: this is an emergent list!)
 1. **Set the ground/prepare the soil**
 - **Adopt a learning stance** and an evaluative mindset
 - **Experience Liberation-** LLC routinely asks, "Does this feel liberatory?" to gauge our actions and aid our decision-making. However, without liberatory experiences or dreams, there is nothing to use as a reference. (e.g. Liberated Zones)
 - **Name your intentions:** "What are we trying to do?"
 2. **Take Action**
 - **Try on:** Create, construct, and prefigure new practices, structures, and ways of being. Revise and rework pre-existing approaches to align them with liberatory vision.
 3. **Learn and Refine**
 - **Learn with Others & Ask Questions** - this doesn't need to be a solo expedition. Learn and share with peers, teammates, and allies, benefit from, and contribute to collective learning.
 - **Assess Risk: The risk of both action and inaction.**
 - Be willing to take the risks required by change.
 - **Get Feedback** - We're all figuring this out. We won't get it perfect the first or the 20th time
 4. **Go back to 1 - Liberatory leadership requires a continuous learning cycle**

Links to equity and liberation resources:

- Making (Or Taking) Space Report by Building Movement Project: "This report seeks to inform the question: What, specifically, is the responsibility of organizations with white leaders transitioning out of these roles to support incoming leaders of color?" <https://buildingmovement.org/wp-content/uploads/2021/10/MakingOrTakingSpace.pdf>
- Brilliant Transformations https://drive.google.com/file/d/1Jb1oUku9TOXfNLmX_IGZMiWQlovRTfEJ/view
- Resources on equitable nonprofit leadership transitions

<https://buildingmovement.org/our-work/leadership/leadership-transitions/>

- Race Equity Toolkit for Leadership Development
<https://leadershiplearning.org/publications/race-equity-toolkit/>
- 2010 Leadership and Race publication by LLC
<https://www.aecf.org/resources/leadership-and-race>

WHAT'S NEXT

As we enter the third and final phase of this year-long pilot Cohort with education leaders experiencing or considering leadership transitions, the LLC team will continue adapting to ensure learning circles and other program components meet participant needs by:

- Offering opportunities to strengthen connections and leverage participant expertise, including via peer coaching.
- Going deeper on relevant content which may include managing boards, managing staff and culture change, succession planning, and/or liberatory leadership.
- Learning from how leaders utilize learning action funds and coaching funds.
- Closing the program with a final in-person convening.