

# LEADERSHIP DEVELOPMENT AND LEADERSHIP CHANGE



# TABLE OF CONTENTS

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INTRODUCTION	I
Background	I
Our interview participants	I
Organizations interviewed	2
How this report is organized	2
KEY THEMES & LESSONS LEARNED	3
Leadership change is an organization-wide process and opportunity	3
Strong and systematic leadership development for constituents and staff is key	5
Insights from allied organizations and support from funders strengthen leadership development and transitions	7
Conclusion	8
CASE STUDIES	9
Exploring New Organizational Structures: <b>St. Peter’s Housing Committee (Comité de Vivienda)</b>	9
Effective Use of Planning and Resources for Leadership Development: <b>Chinatown Community Development Corporation</b>	11
Expansion of Leadership: <b>Southwest Workers Union</b>	13
Founder Transition and Community Connection: <b>Coleman Advocates for Children and Youth</b>	15
CONCLUSION	19
Overall Recommendations to the Field	19
ACKNOWLEDGEMENTS	21

# INTRODUCTION

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## BACKGROUND

*Leadership Development and Leadership Change* is a report on how a group of social justice organizations, in the Bay Area and nationally, are linking leadership development to executive leadership transitions paying particular attention to race, class, gender, and age. The four collaborating organizations that oversaw the project and the production of this report [Partnership for Immigrant Leadership and Action, National Community Development Institute, Movement Strategy Center, and Building Movement Project] have all worked with a diverse group of social change oriented nonprofit organizations on leadership issues. We each participated in this project to learn and share lessons on how organizations approach leadership development and leadership transitions, particularly during a time when nonprofits in California and across the U.S. are going through dramatic demographic and generational shifts.

We know from our work and from others in the field that leadership transition often affects the entire organization. Transition consultants suggest groups prepare by creating a process for leadership shifts and putting in place an emergency plan. In the process, organizations can imagine how everyone would function without the current leader. We found in our interviews, groups going through transitions did best when they also had a commitment to develop organizational staff, and in some cases constituent leadership, in ways that spread knowledge, skills and responsibility. Leadership development also helped to further the organization's day-to-day ability to accomplish its mission and vision.

Nonprofits have focused on transition planning in part because of the predictions that the baby boom generation leaders who are entering traditional retirement age will be leaving their jobs and a new generation of leaders is emerging. Now more Boomers are thinking of staying longer in their work to continue to contribute to the field and to maintain an income stream, but many are considering cutting back on their work and distributing leadership within the organization. In addition, executive directors are still overwhelmingly white as noted in the CompassPoint *Daring to Lead* studies that found only 17% of executive directors were people of color. Yet the demographic changes in the U.S. mean that there should be unprecedented opportunity for people of color to lead organizations.

This shift – to younger generations and to more people of color – will not happen without sustained and systematic development of leaders and attention to how power dynamics impact organizational change. In this project, we focused on how social justice organizations cultivate new leadership and navigate leadership change attending to race, class, gender and generational differences and including people from impacted communities.

## OUR INTERVIEW PARTICIPANTS

In *The Leadership Development and Leadership Change* project, we surveyed over 30 organizations about their leadership development practices and conducted 15 interviews with staff members of social change organizations in the Bay Area and nationally to explore the ways they develop organizational leadership and the impact on leadership transition. We define social change organizations as those whose mission and key strategies address the systemic causes of a problem. The groups in our survey ranged from small grassroots organizing groups to a large

multi-service neighborhood center and a community development corporation established in the 1960s. The organizations selected for more in-depth interviews had experienced a recent (within past three years) leadership transition, were in the process of leadership change, or were exploring what it would mean to go through a shift in leadership.

## HOW THIS REPORT IS ORGANIZED

This report is intended for many audiences, including practitioners, those providing technical assistance and support to non-profits, leadership trainers, and funders. There are two parts to the main findings of this report. The first part presents overall themes and findings based on our survey interviews. These themes are summarized along with quotes from the interviews to give a better sense of people's experiences and analysis.

The second part is a set of four mini case studies. Four groups were selected for the mini case studies to obtain a more nuanced picture of the impact of leadership development and leadership change. St. Peter's Housing Committee, Chinatown Community Development Corporation, Southwest Workers Union, and Coleman Advocates for Children & Youth different examples of organizational structures and practices that promote leadership development, but also provided lessons of what doesn't work as well, especially during leadership transitions. Interviews were conducted with executive leadership and staff in each of the organizations. In addition, policies and organizational materials were reviewed.

Following these two sections, we offer our overall analysis and recommendations. Additionally, related tools and resources will be available online at [www.buildingmovement.org](http://www.buildingmovement.org).

## ORGANIZATIONS INTERVIEWED:

**Alternatives for Community & Environment (Roxbury)**

**Bernal Heights  
Neighborhood Center  
(San Francisco)**

**Chinatown Community  
Development Corporation  
(San Francisco)**

**Chinese Progressive  
Association (San Francisco)**

**Coleman Advocates for  
Children and Youth  
(San Francisco)**

**Data Center (Oakland)**

**Families for Freedom  
(New York City)**

**Mujeres Unidas y Activas  
(San Francisco, Oakland)**

**Project South (Atlanta)**

**San Francisco Women  
Against Rape  
(San Francisco)**

**SouthWest Organizing  
Project (Albuquerque)**

**Southwest Workers Union  
(San Antonio)**

**St. Peter's Housing  
Committee (San Francisco)**

**Youth United for Community  
Action (East Palo Alto)**

## KEY THEMES & LESSONS LEARNED

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The themes and lessons that emerged from our interviews reflect the premise that organizational values, structure, culture and power inform and transform leadership in social change organizations. Our interviews underscored that successful leadership development and transition planning are interrelated. We found that (1) Leadership change is an organization wide process and opportunity; (2) Strong and systematic leadership development for constituents and staff is key; and (3) Insights from allied organizations and support from funders strengthen leadership development and transitions. These findings reflect the specific lessons and practices from organizations promoting women, people of color, younger generation and constituent leaders.

### LEADERSHIP CHANGE IS AN ORGANIZATION-WIDE PROCESS AND OPPORTUNITY

Our interviews confirmed that leadership change did not involve just one leader, but had an impact on the entire organization. Trust building was critically important to successful leadership transition planning within and across all levels of the organization, including staff, board, constituents and external stakeholders. Trust building involved developing an organization-wide culture of transparency and collaboration by naming values and setting goals together, and breaking down work silos. As leaders transitioned, an atmosphere of trust helped groups to deal with the emotional dynamics that needed attention. One organization explicitly set a goal that “We want to feel good at the end of this transition,” recognizing that how people felt about the process was just as impor-

tant as the leadership change itself. While clearly important during leadership transition, many organizations understood trust building as an ongoing process.

*Trust was the essential foundation for the transition. We had years of work and collaboration together, a lot of political trust. This trust reflected the founder’s leadership in which he opened up space for people with an invitation to create and design. It also reflected how we worked together. For example, we never facilitated alone. We always facilitated in pairs as a basic principle. That builds understanding of the other person. And there was a high priority on debrief and evaluation afterward. You do work together. Then, when you’re in more of a response/crisis phase you have a ton of ground between you.*

*We’re trying to build a different culture of care for each other. That is very important to the transition. As women of color we can be very self-righteous... pretty fierce with each other. But, the interpersonal dynamics don’t have to be hostile. We are trying to more realistically name and address the ‘horizontal hostility’ among women of color. We’ve had a lot of dialogues. We are developing ‘principles of women of color leadership.’*

*When I came in I had no idea what the organization’s work culture was. I had hints from staff that ‘it was different working here.’ In making changes I had no idea what I was up against. As Co-Director I was revising and updating the personnel policy. I thought it would be easy. No. It opened my eyes to how frustrated staff was. It was challenging to change the culture. I had to really say ‘It’s okay to change.’ Even around decision-mak-*

*ing and transparency. Staff didn't feel like stakeholders. It has been engrained in the organization ... We've been trying different steps, having retreats to hammer out things like how to make endorsements, how to make decisions on campaigns, how to develop work plans. Old habits die hard.*

*It's not just leadership transition. It's really organizational renewal where you look at strategy, tactics, opportunities, everything.*

*When the founders decided they were going to leave we did an organizational retreat that included members, allies, and stakeholders. We hired a facilitator who was already engaged in the work with the organization, an ally who knew the campaigns and had a basis of knowledge of our organizing and a keen assessment of the organization and where it was going. She really knew how to navigate the conversation. In the retreat we set up a committee structure for the organization, talked about the leadership transition and how we should do it, talked about formalizing leadership development and how we should do it. We made decisions at the retreat.*

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**“It's not just leadership transition. It's really organizational renewal.”**

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Trust building needed to move beyond the exiting leader to the new one. That often required one-on-one as well as group work, such as in the case when a younger leader assumed there was trust from an older board member when there was not:

*There was agreement on the board that we needed a new budget development process. One of the board members had volunteered his time and was doing the books. We all agreed we needed a more inclusive/transparent process. Then I said 'Let's bring in a consultant' and then came the friction. There needed to be more conversation with the individual. I need to ask, 'How do you feel? How can you get comfortable?' I thought that we had done due diligence. We had had a meeting and an agreement. But I should have spent more time asking 'What are you afraid of?' digging more. There are things people don't say in a group meeting. I should have asked different questions, created different opportunities for discussion, and allowed for more time.*

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**“We're trying to build a different culture of care for each other... developing 'principles of women of color leadership.'”**

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Outgoing leaders often served as a bridge when tensions arose. The active participation of outgoing founders in transition processes was particularly important where there were generational differences between some members of staff and board. Most outgoing and incoming leaders recognized that trust building takes time.

*We're not using a 'replacement model.' We are transitioning leadership. This was a collaboration between board and staff that leaned on our earlier strategic plan. The transition was part of that. We looked at the conditions that needed to be in place to transition. We had internal conversations about what would need*

*to happen in areas like fundraising and political development. Staff were thinking about their roles in a deliberate process that included the founder. The staff approached the board with an executive team proposal. We saw it as an intergenerational collaboration, not ‘passing the torch.’*

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**“Staff were thinking about their roles in a deliberate process that included the founder...We saw it as an intergenerational collaboration, not ‘passing the torch.’ ”**

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*The board had a reluctance to young leaders who were new to management ... I made a plea to the board to take the risk.*

*We're a multi-generational organization. We are an organization of families. I've learned that how you come to this work colors your perspective of it. Different generations may have a different view of the role of the organization in making change. You need to get clear about the change that's expected. It's about building trust. I wasn't there with the older generation when they were coming of age. They did stuff together. That's how you trust people. It takes time.*

## **STRONG AND SYSTEMATIC LEADERSHIP DEVELOPMENT FOR CONSTITUENTS AND STAFF IS KEY**

Many interviews surfaced the importance of ongoing leadership development for both staff and constituents in relation to successful leadership transitions. In organizations with strong and systematic leadership development, women, people

of color, younger generation and constituents were often already part of the organization's leadership, or were being encouraged to take on leadership positions resulting from transitions. Cultivating leadership from the constituent base is a central tenet and ongoing commitment for many social change groups. As put by a staff member of the SouthWest Organizing Project, “Organizations are vehicles for political education and leadership development.”

One organization that practices ongoing constituent leadership development is Mujeres Unidas y Activas (MUA), a grassroots organization of Latina immigrant women with a dual mission of personal transformation and community power based in the San Francisco Bay Area. MUA members develop confidence and skill-sets that allow them to take on leadership roles in the organization. Member leaders decide key aspects of the organization's work (i.e. the direction of a new campaign). The role of the MUA staff is to support the members' decision-making process. Leadership development also allows MUA to build their staff and board with constituents. When a leadership transition occurred at MUA, the organization hired its co-director from its base. Many of the organizations interviewed looked to their constituents for staff hiring and other leadership opportunities, such as positions on the board of directors.

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**“We've achieved class diversification of people of color on our board. Now the question is how to bring in long-time organizers and community leaders.”**

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*We have an organizational value around indigenous leadership. So we set up a three tiered process where we look for people among youth par-*

*ticipants, then among staff and allies in the community, then externally, like on Craig's list. In this transition we identified a few folks and asked two of them [to apply for the director position]. One said yes. Then she went through an internal hiring process in which we identified her strengths and weaknesses. She started with the organization at fourteen as a volunteer, then as a youth participant, then as staff, and now as director.*

*Our board was always a majority people of color. We've moved even further now with people of color grounded in community work, not just professionals. We've achieved class diversification of people of color on our board. Now the question is how to bring in long-time organizers and community leaders. In the future there will be even more people who come directly out of the organization's work.*

In some of the organizations, leadership development was less systematic. We found there were some executive directors, especially founders, who selectively mentored younger staff members in an informal leadership development process. The level of support given to staff to take on new leadership roles during transitions varied. In some instances, leadership development opportunities occurred through "creative disruption," such as a sabbatical of a key leader, or an unplanned leave.

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**Leadership development opportunities may occur through "creative disruption," such as a sabbatical of a key leader.**

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*There was a process of mentorship for me about running the organization beyond my role as an organizer. I started managing staff, running the summer internship program, even doing some finance and administration. The founder used to go over the financials with me but she never told me why. It was very informal. It could have used a little more formality. I was once asked, 'Did you ever get asked if you wanted a leadership role?' My answer was 'No, actually not.' There were a lot of assumptions. It worked out in the end. But, it caused problems, especially with the board because they weren't hip to the arrangement.*

*The founder's style is to step back and provide space for others. It's an opportunity and a challenge. People responded to the opportunity but they were not always supported. Now we're asking 'How do we have a collaborative leadership style reflecting co-facilitation?' We're going from strong initiative leadership to more collaborative group-style leadership. We're underdeveloped in group process. We want to...get back to the group.*

*I went on sabbatical last summer and we had a staff person serve as interim director. There were assumptions that this was the possible successor, but I was clear that it was a learning opportunity. It was an opportunity to start asking questions without having to answer them. The board saw the importance of their role. The staff and interim director learned a lot.*

## INSIGHTS FROM ALLIED ORGANIZATIONS AND SUPPORT FROM FUNDERS STRENGTHEN LEADERSHIP DEVELOPMENT AND TRANSITIONS

The interviews also revealed that organizations sought out advice and support from their peers to shape leadership development goals and to plan for transitions. One founding director said that he talked to twenty other founding directors to learn from their experience and perspectives. Other organizations saw leadership development and leadership change not just as internal organizational work, but also as an opportunity to strengthen the overall movement. One group emphasized that in their internal political education, they were consistent in asking, “What does the movement need us to know? What do our partners need us to know?”

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### “What does the movement need us to know? What do our partners need us to know?”

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*While it was nice to know that our consultant was there, I had a lot of experience in the movement so I had a lot of people to draw on. That was more useful to me. Our consultant could give me the nitty gritty of doing a budget. But I wanted to talk to other women of color who wanted to do it differently. How do you put your skills into practice in a way that reflects equity and authentic relationships, and acknowledges power dynamics? How does it play out in supervision of women of color in a way that isn't abusing power? I needed to talk to other women of color and other white allies to ask, 'What did you do? How did it work for you?'*

*A few years ago we did a series of leadership seminars focused on leadership development and leadership transitions. We did it as a movement building process. We invited other organizations. It was really helpful to learn from other organizations and to push and share among organizations.*

*Externally the transition has focused on five or six allies that are really essential to our work. That has been key. Those allies have no doubt about the new leadership.*

*For my own (outgoing) transition, I got more involved with other boards. It helped me think through my transition and helped me find other outlets for my work.*

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### “I wanted to talk to other women of color who wanted to do it differently. How do you put your skills into practice in a way that reflects equity and authentic relationships, and acknowledges power dynamics?”

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In order to be successful, organization-wide leadership development and transition planning required adequate time and resources. An important part of the leadership transition process for many groups was communicating and engaging with the organization's funders. One organization approached its funders and said, “Here's what's happening. Do you have any questions?” Several of the organizations solicited additional grants specifically to plan for transition. Funding support afforded an opportunity for organizations to develop a succession and strategic plan as well as develop the staff leadership.

*We got a grant to promote, study, and institutionalize leadership. In the first year we used it to complete our strategic plan, started working on an executive succession plan, developed a middle manager leadership training program, and took our community organizers on a study trip to New York City.*

*We always placed a high value on grassroots fundraising. We wanted to bump that up in the transition.*

*We were proactive in putting out our message to funders. We said, 'This is everything we're going through and it's okay.'*

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**An important part of the leadership transition process was communicating and engaging with the organization's funders.**

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## CONCLUSION

The organizations that participated in our interviews grappled with different approaches to developing trust across the organization during times of leadership change. Identifying and supporting constituent and staff leaders consistently helped to establish a smooth path for leadership succession, long before transitions occurred. Movement building perspectives encouraged the sharing of leadership development tools and resources among allies. Many groups saw the opportunity of leadership development and change in their own organizations as a means to help strengthen the movement as a whole. Funding support provided some organizations the time and resources for a deliberate leadership change process that also

reinforced their commitment to ongoing leadership development.

The four mini case studies that follow illustrate how St. Peter's Housing Committee, Chinatown Community Development Corporation, Southwest Workers Union, and Coleman Advocates for Children and Youth responded to the challenges and opportunities of significant leadership transition within their respective organizations. The case studies were selected to give a closer look at the complex organizational dynamics that produced positive transition processes. St. Peter's organizational value of participatory leadership led to a change from a single executive director structure to experimentation in organizational forms. In the case of Chinatown Community Development Corporation, additional resources allowed for a two-year transition planning period. Founder leadership change at the Southwest Workers Union brought a younger generation to leadership, and created new opportunities for strengthening movement ties. Coleman Advocates for Children and Youth experienced a shift in leadership from an older white woman leader to a younger generation woman of color leader. For Coleman, the transition led to the organization's reconnection with their constituents through community-based strategic planning. Instituting or deepening leadership development was considered an important opportunity of each group's leadership change process, and a crucial aspect of transition success.

## CASE STUDIES

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### EXPLORING NEW ORGANIZATIONAL STRUCTURES: ST. PETER'S HOUSING COMMITTEE (COMITÉ DE VIVIENDA)

*Organizational structure and cultures play a role in re-examining the executive director position and can inform how to make the job “doable.” St Peter’s Housing Committee went from a hierarchical, top-down approach to a leadership collective consisting of staff and constituents based on an organizational value that participatory leadership builds stronger leadership.*

#### **Living Out Values: Effective Organizational Development that Reflects Political Vision**

San Francisco’s St. Peter’s Housing Committee (Comité de Vivienda) is an eight person, bi-lingual, bi-cultural and multi-generational collective working in the Mission District of San Francisco. The Mission District’s longtime majority Latino community has struggled to preserve community stability and viability, and battled against gentrification and cultural piracy for over twenty years. As start-up Dot Com businesses moved into the Mission en masse in the late 1990’s, there was an enormous number of residents who were displaced. St. Peter’s became a visible leader preserving the culture, lives and jobs of long-time mission residents.

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**St Peter’s had always held the value of community leadership and participation, now they were living it**

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Over the last ten years, St Peter’s has tried a number of different leadership models in

a bold effort to create a leadership structure that both represented their politics as well as worked effectively to accomplish their goals. Leading with the clear politic of self-determination, they moved from an executive director model of leadership to a collective committee structure to reflect their values as a community-based membership organization. Then, after examining the pros and cons of the collective committee structure, the organization refined the leadership structure to their current form, a co-directorship. How did they get there and what did they learn?

When the standing executive director left St. Peter’s ten years ago, the staff made the deliberate decision to move from a traditional hierarchical leadership structure to a shared leadership model. The new model was defined by flattening their leadership structure to form a three-person directorship that collectively ran the organization. Their aim was to make the organization more participatory, enacting their belief that participatory leadership builds stronger leaders.

#### **On the Road to Collective participation: Integrating Community Leadership Throughout the Organization**

As an executive director-led organization, decisions had been made from the top with little transparency and communication to staff members. Staff often had no information about how or why decisions were made. This created an organizational dynamic of lack of agency and participation. The collective committee structure sought to address and transform this dynamic. In the collective committee structure, all organizational decisions were to be made by the full staff group. For example, the full group was responsible for both drafting and vetting proposals as a whole. However, when this ideal way to operate was brought into practice, the staff collec-

tive discovered that they underestimated the time and skills needed to prepare everyone to lead the organization.

Current co-director and long time staff member Maria Poblet remembered, “We thought, ‘Why shouldn’t we have control over this?’ But once we started doing it, people didn’t have the skills or development to truly take on the level of authority needed to run the organization.” They saw that not everyone was ready to participate equally in decisions and didn’t have all the information or skills to do so. Maria added, “We thought ‘collective was better’ but that was not true. It depends on the balance of forces you’re dealing with and where you want to go. We went to such an extreme that we even debated whether people should be supervised. We started with a shallow understanding of collectivity. For example, because women of color experience socialization around oppression, it can make it easier to say ‘Let’s be a collective because I’m unsure of my own decision-making power.’ “ The collective members saw they needed to identify requisite skills for different aspects of leadership, ranging from political to administrative needs. They also sought to create a process for naming and affirming their values.

After this experiment, the organization had much more clarity about leadership roles. Rather than abandon their ideals, including the commitment to members running the organization, St. Peter’s spent over two years focused on skills building for the collective. Leadership development also included in-depth team and trust building, in which the staff brought their full selves, emotional and political, to the work. This focus coincided with bringing more of the organization’s membership – Latino immigrant tenants in the Mission – into staff leadership. Those working at St. Peter’s recognized that in more traditional organizations much of the staff wouldn’t have

been hired, because of their lack of experience or educational credentials. However, the core values of the organization led to a commitment to spend the time and energy necessary to build the leadership of their constituent members. Currently, half of St. Peter’s staff is former members. All current staff members are women.

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**In more traditional organizations much of the staff wouldn’t have been hired, because of their lack of experience or educational credentials.**

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### **Learning from Experimentation: Refining the Path to Organizational Effectiveness**

After creating a new organizational culture in which people’s individual development as leaders was prioritized organization wide, those working at St. Peter’s sought to alter the dynamic slightly to make their time more effective and reflect on what they learned. They moved to their current version of co-directorship in which two co-directors lead the collective, including preparing proposals, which are vetted and approved by the staff. In this form of co-directorship, the collective continues to have a full voice at the decision-making table, but the co-directors are charged with moving the process forward and supporting staff fully. As Maria, who is now one of the organization’s two co-directors said, “The leadership structure that we have now is more in line with our mission in terms of empowerment because it acknowledges the process of development for new staff and what it really takes for people to take on more leadership.”

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**“Not everyone can run a campaign, balance a budget or write a policy platform, how do you make it possible for more people to do that?”**

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St Peter’s leaders always see the organization as a work in progress. This internal process presents new questions, as they look toward the future. The members who became staff have now fully developed the necessary skills to lead the organization, but as one staff member noted about the larger membership, “Not everyone can run a campaign, balance a budget or write a policy platform, how do you make it possible for more people to do that?” St Peter’s is always asking questions in a way that lives out their values; pushing themselves to learn and adapt, not just during a leadership change. They have created an organizational culture where change is possible and assumed.

## EFFECTIVE USE OF PLANNING AND RESOURCES FOR LEADERSHIP DEVELOPMENT: CHINATOWN COMMUNITY DEVELOPMENT CORPORATION

*Effective use of planning and resources for leadership development lead to successful transitions. Chinatown CDC was the recipient of a Flexible Leadership Award grant from the Evelyn and Walter Haas, Jr. Fund, and the resulting financial resources, time, and external expertise has played an important role in their process.*

### **How to Seize a Leadership Change Opportunity**

The Chinatown Community Development Corporation (CDC) was founded in 1977 by five local Chinatown organizations as a traditional community development corporation. In its 31 years, it has grown to more

than 100 staff members and is a leader in just housing policy and creation. Their tenants’ rights, planning and youth leadership programs help to create a powerful community presence in Chinatown and insure just housing policy and options for local residents. Over the last year, through the announcement of the transition of Chinatown CDC’s long-time leader, the staff has begun to explore what change could really bring and mean.

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**“We had to ask who would be in charge, what would be the role of the board. It helped us not just think about replacing one position but taking stock of that role and evaluating the organization and strategies.”**

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### **Inviting Creativity: Leadership Change, not Leadership Replacement**

Executive Director Gordon Chin has led the organization through much of this evolution and, as of 2008, began planning his transition for 2010. Gordon, who helped to found the organization, is a community leader in Chinatown and a bridge builder who’s been central to the organization’s success. Gordon’s perspective and plan is that his transition is not just about replacing him. He noted, “Before I announced I was leaving, we had done a deliberate process around developing emergency succession plans. These included short-term planned successions, short-term unplanned successions, long-term planned and long-term unplanned successions. They really informed our organization. We had to ask who would be in charge, what would be the role of the board. It helped us not just think about replacing one position but taking stock of that role and evaluating the organization and strategies.” In this case, an outgoing executive director

was looking to foster the possibilities of change for the organization and, to challenge the concept of a “replacement.”

One younger staff member agreed. When asked about her thoughts about the potential new director, she replied, “I don’t think the new ED should be just like Gordon.” This staff member also noted that right after Gordon announced his departure, he sent the staff a full description of his job, detailing what he really does each day. The executive director of a large organization can often feel distanced and unknown by staff. In turn this can make the leadership transition feel unwieldy to staff. This simple act of sharing knowledge created a space of transparency at the start of the transition. In fact, both Gordon’s openness to have younger staff members talk with us about the transition and the staff members’ excitement in cooperating with this case study is another expression of a commitment to this kind of collaboration.

### **Effective Relevant Outside Support**

Gordon’s vision of transition was helped by the use of outside consultants and advisors from the beginning. Through a Flexible Leadership Award grant from the Evelyn and Walter Haas Jr. Fund, Gordon and Chinatown CDC are working with CompassPoint, a management support organization, to plan this process two years before the transition will occur. Gordon and the organization’s deputy directors have received coaching, and a transition team, made up of staff and board, will have consistent outside support from CompassPoint. Gordon pointed out, “We got a grant to promote, study and institutionalize leadership. In the first year, we used it to complete our strategic plan, started working on an executive succession plan, developed a middle manager leadership training program and took our community organizers on a study trip to New York.” A

staff member who participated in the middle manager leadership trainings noted that it was vital that these facilitators were known and trusted by the organization and that the facilitators understood Chinatown CDC’s work.

### **Leadership Transition Often Brings Further Change**

Transition planning proved helpful sooner than expected when one of Chinatown CDC’s two deputy directors announced her departure nine months into Gordon’s two-year process. The organization now faced two transitions, one of a long time executive director, the second of a long time organizational manager. It is a common and normal occurrence for further staff transitions to occur as an executive director exits an organization. Anticipating changes and planning ahead beyond the executive director level helped Chinatown CDC to ensure a smooth transition for both positions.

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**It is a common and normal occurrence for further staff transitions as an executive director exits an organization.**

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### **Hope for Organizational Renewal: Staff’s Perspectives on Change**

Transitions often unleash natural tensions along with strong expectations among staff. The staff members interviewed reported that the majority of the Chinatown CDC’s staff saw this transition as an opportunity for a “new beginning.” One staff member noted the possibility to “revamp staff morale” as new energy comes in. They looked forward to change bringing further staff accountability and transparency, as well as an opportunity for standardizing procedures and streamlining an organization that has grown substantially

over the years. The younger staff we talked with were focused on political questions such as: Will the new leadership reflect this current organization's social justice values? Will they be able to successfully navigate Chinatown CDC's dual role as a tenant's welfare advocate and landlord? Can the new leadership bring about an organizational culture shift to make us more effective? It's important to note that hope for change or a new beginning is a common reaction to leadership transition. A leadership shift, especially of a long-time leader, opens up the possibility of the next chapter and next evolution of the organization, to take where the last leader left off and move the organization forward.

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**“[C]hange means the possibility of the next chapter and next evolution, to take on where the last leader left off and move it forward”**

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Gordon's willingness to be open and creative about departure also has had positive effects before he leaves. One staff member noted that she's learned already that “[o]utgoing leaders are more open to help staff implement changes. They are more willing to make changes now than in the past or acting on it a lot faster.” As the Chinatown CDC staff started to reconcile themselves to Gordon's and the deputy director's departures, they began to see in what ways they will have to take on new leadership roles. For example, Gordon holds many of the needed political relationships outside the organization; as he prepares to depart, these relationships will need to be shifted and grown by other staff members. One staff member noted that she has already started to build some of these relationships. This is another way the preparation for leadership transition has encouraged leadership development in other staff. As Chinatown CDC looks to

its leadership transitions over the next year, they have already effectively developed a transparent process that they can continue to build and learn from as they explore the possibilities new change brings.

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**“[Outgoing leaders] are more open to help staff implement changes that existing staff feel they need. They're more willing to make changes now than in the past or acting on it a lot faster.”**

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## **EXPANSION OF LEADERSHIP: SOUTHWEST WORKERS UNION**

*Opening spaces for new leadership within an organization can lead to a shift in organizational practice. Southwest Workers Union found that new (and younger) leaders connected to new networks and external learning led them to a more visible role at a national level of movement-building.*

### **Generational Leadership Change Deepens Long Term Work**

Founded in 1988, Southwest Workers Union (SWU) organizes workers, students, parents and community members in low-income working neighborhoods of San Antonio and Austin. Over the last year, transformative and strategic leadership change has allowed SWU to grow in national scope and reputation, while their strength is found in its 2,500-person local membership. The union has done this through the new leadership's use of peers, resources and two generations' work to build out this almost 20 year-old organization.

SWU defines itself as a movement-building organization. Its goals and strategy are inherently and explicitly linked to the work

of other movement-based organizations in the US and internationally. Their relationship with movement allies helps to inform how they grow their organization, and in turn, how they choose and develop their movement's leadership. They are able to define themselves as both deeply local in their efforts but global in their analysis and long-term vision. Two of the groups we interviewed in this study are key movement-building allies of SWU: Southwest Organizing Project (SWOP) in Albuquerque and Project South in Atlanta. All three organizations have recently undergone creative generational leadership changes and all work together to build strong movement-centered alliances to forward their work.

### **Building on a Generation's Work and Culture**

SWU had a specific organizing culture taught from generation to generation, a family-based culture and sometimes actually biological family-based staff. Young people are brought in and mentored both intentionally and indirectly from high school on, in some cases since elementary school. There is an implicit understanding that as generations move forward, younger staff will continue on with the work. As long-time director Ruben Solis saw it was time to move into a different role, younger member Genaro Rendon stepped into leadership at SWU. In his early thirties and a local Chicano organizer, Genaro had grown up in the organization. One key element that made this transition smooth was that Ruben and other elders continued on as staff and acted as resources to the new leadership. However, they moved to a different office, providing actual physical space between the outgoing leadership and newer leadership. The organization has been willing to explore what it means to transition in a new generation of leaders while looking at the next steps for its founders. Ruben was also focused on

writing the history of the organization and its work.

### **Bringing Personal Values to Organizational Planning**

The new executive director, Genaro, has been exposed to a growing number of national networks and resources. Through participating in the Rockwood year-long program Art of Leadership, he's built strong allies and relationships with organizations, intermediaries and funders across the country. He brought these tools back into his organization. Genaro remembered, "At our last retreat, we focused on bringing individual purpose to our organization purpose. We addressed the challenge of getting on the same page. We tried to connect on a deeper level around who we are as people in order to develop a joint organizational vision. I had gone to the Rockwood Leadership Institute and we had done the touchy feely stuff where we personally reflected. I felt really empowered by that and wanted to share it with my organization. We created a purpose statement for our organization and some common values around a definition of 'respectable leadership' that set the standard for everyone on things like follow-through."

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**"We've really changed who and what is the face of our organization. It was the founders; now it's a variety of faces including women and youth."**

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By leading his staff in a values-based conversation, Genaro set up an organizational culture where staff members are accountable to each other in a deeper, more lasting way. Though this new executive director had grown up within the organization, it was important for him to lead the organization in a renewal of their mission and values. In doing so, they have made

explicit the political and values-based assumptions that have always led the organization. This internal work provided a strong foundation for making other changes in the organization. For example, one value expressed by the organization was diversity in organizational leadership. Genaro noted, “We’ve really changed who and what is the face of our organization. It was the founders; now it’s a variety of faces including women and youth.”

### **Building Power through Networking and Movement Building**

SWU and its allies have built powerful national alliances in the last several years. They helped to develop regional and national brown/black alliances between community organizing groups and regional south by southwest work with allied groups like the SouthWest Organizing Project and the Southwest Network for Economic and Environmental Justice (SNEEJ). SWU was also active with Project South in the organizing for the United States Social Forum in 2007. They have been successful alliance builders because this work is central to their mission and values, and the commitment has made it possible for SWU and their allies to achieve their goals more effectively. Genaro commented on one of the first times he was involved in doing a movement-building gathering, “A few years ago we did a series of leadership seminars. We did it as a movement-building process. We invited other organizations. It was really helpful to learn from other organizations and to push and share among organizations.” These strong relationships with other groups build in peer support and training, creating an organic flow of shared leadership development. In this way, SWU has used the transition process and its leadership development efforts as opportunities to continue and strengthen its movement-building legacy.

### **FOUNDER TRANSITION AND COMMUNITY CONNECTION: COLEMAN ADVOCATES FOR CHILDREN AND YOUTH**

*Founder transition can lead to changes at all levels of an organization. Coleman Advocates for Children and Youth used the lessons they learned from generational change in the organization’s leadership to embed leadership development at all levels of the organization.*

### **Re-imagining an Organization: Making the Implicit Explicit**

At Coleman Youth Advocates in San Francisco, a major organizational victory precipitated an executive transition in 2005. Through the hard work of Coleman’s grassroots organizing and policy advocacy with city officials, Coleman and their allies helped to win “The Children’s Amendment” in 2000, making San Francisco the first city in the country to have earmarked funds in the city budget for youth. These funds are housed in the Department of Children, Youth and Families. In 2005, by mayoral appointment, long-time Coleman Executive Director Margaret Brodtkin took the helm of this department and its groundbreaking fund she had helped to create. After many years of running Coleman and working for this kind of policy change, Margaret transitioned into a new role working to implement change at the city level, leaving her role as executive director of Coleman Advocates. While the relatively sudden departure may have been a crisis for some organizations, pre-existing leadership development opportunities at Coleman helped prepare the organization for this unexpected change.

N’Tanya Lee, a 35 year old African-American long-time youth and racial justice organizer, was the Director of Y-MAC (Youth Making a Change) the youth organizing arm of Coleman at the time Margaret decided to leave the organization. Though

N'Tanya was not explicitly groomed for the executive director position, she had already been given free reign to grow and run her program like a proto-executive director. Having built an organization within a larger organization, N'Tanya, demonstrated her leadership potential to outgoing executive director Brodtkin and was named as her successor after an internal process. Since taking the helm of Coleman, N'Tanya has led the organization through an effective community-based strategic planning process setting a new direction with deepened community involvement and support. With a base of 500 families in San Francisco, Coleman's strong policy platforms are created, led and promoted by members through community organizing campaigns.

As with Chinatown CDC, having a long-time executive director meant Coleman had policies, practices and politics embedded in the organization, but not made explicit. In her first two years as executive director, N'Tanya worked to make these assumptions explicit. She also created the conditions, through facilitated discussions with the community and a strategic planning process, to surface new ideas and directions. N'Tanya built on the work of the previous director and also changed course where needed.

### **Successful Support from an Outgoing Executive Director**

N'Tanya was supported by the outgoing executive director and noted, "Margaret did an outstanding job of letting go." While she remained available to N'Tanya and met with her every three months off-site to check in, the outgoing director also kept clear boundaries with board and staff who continued to reach out after the transition. N'Tanya reflected, "I became a credible leader of the organization and it happened quickly, because [Margaret] wasn't interfering – she stayed on message and didn't

take people's calls." This kind of commitment and grace from an outgoing director cannot be stressed enough. Margaret was paving the way for a new leadership and focused on making the transition run smoothly. Additionally, N'Tanya had institutional support for her transition. N'Tanya recalled, "The chair of our board was a long time activist, a person of color who was really aligned with the staff vision. He went off the board to be a consultant with us, actually more like a staff person, to address institutional memory issues." Having a key ally on the board aided N'Tanya in building trust among board and staff members as she navigated her new role. The internal transition was relatively seamless as a result of Margaret's good boundaries and N'Tanya's own leadership including her previous relationships with staff. But the transition was not without its challenges.

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**Paving the way for a new director to take leadership is the clearest step an outgoing executive director can take for making the transition run smoothly.**

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### **Navigating Leadership Transition without an Explicit Plan**

N'Tanya's overall transition process to the executive directorship has brought to light much of what worked about building leaders within Coleman and clarified what she has since sought to change. As a young leader in the organization, she was able to work autonomously, grow her own program, and show her leadership skills. There was no explicit leadership development in place for staff at the time. Through an informal development process, N'Tanya was able to fully take on the position. At

the same time, she was never explicitly vetted for the position.

Having never made a succession plan, the Board dynamics created some of the biggest challenges after the transition. Some board members had doubts about the new community-based vision for the organization. As N'Tanya recalled, "We didn't handle the board transition well. It was made clear that the board would need to change around more representation from the community...We had an agreement to add to the board but not to subtract. In some cases it was congenial, in other cases it was less fine. It was the toughest thing."

### **Community-based Strategic Planning as Tool for Leadership Accountability and Organizational Culture Change**

Though Coleman was already a multi-racial community-based grassroots organization, the executive transition was also significant as a shift from an older white woman to a younger African-American woman in leadership. This change altered the community, board and membership's perception of the organization. Board, staff and membership needed a way to clarify their expectations and roles in the organization. Through interviews and focus groups with community members, the transition also provided new space to explicitly talk about the power dynamics of race. N'Tanya recalled, "We heard the critiques from the communities of color. We could have those conversations [as an organization during strategic planning] without defensiveness. The information from that laid the foundation for moving the organization in a different direction."

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**"The most important part was that it wasn't just my vision. It was highly participatory."**

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N'Tanya noted, "The most important part was that it wasn't just my vision. It was highly participatory. As a result, I could be a hard ass when I needed to. If the board was wanting to move in another direction, I could say, 'No, We're not going to revisit that. That decision was made by the organization.'" N'Tanya led the organization by giving the staff and indeed, herself, a clear mandate for moving forward.

### **Making a Healthy, Honest Transition, Personally and Organizationally**

In reflecting on her transition, N'Tanya said there were some key steps that supported her personally. First, she gave herself the space to intentionally ask "Do I want to be the Director?", rather than simply assume she should take the position. She also was able to practice being the director before she actually assumed the role, running meetings and trying the job on for size. Lastly, before accepting the job, she conducted interviews with board, staff and membership to get a sense of the perception of the organization and its leadership. These interviews included conversations with "historical detractors," and she later noted that these critiques of the organization were particularly helpful both in understanding how the organization was perceived and for laying the ground work for the strategic planning process.

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### **Navigating race and class dynamics in the midst of a change in power in an organization brings the need for deliberate non-traditional support.**

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N'Tanya was the both the first person of color and the first person from a working class background to lead Coleman Advocates. Navigating race and class dynamics in the midst of a change in power in an

organization meant that she needed support to keep her balanced. “I had to ask myself would I do the internal work I needed to deal with that. I had a great therapist. She was a huge help to the organization. I went every Friday morning, no matter what the craziness or deadlines. I didn’t say out loud to anyone that it was part of necessary support.” N’Tanya created the space each week to talk about the emotional and psychological toll of the process. It was in this time that she could reflect on both the internal dynamics, and the day-to-day conflicts of the job. For N’Tanya, the support came through her personal therapy. Others in similar positions may turn to coaching, intentional space for reflecting, creating time with family and friends, or other venues. A place where new leaders can decompress allows them to fully process the dynamics of the job. In turn, this personal reflection time helps an executive director to be a better leader.

### **Making Leadership Development Explicit**

As N’Tanya settled into leadership, she focused on the lack of explicit leadership development in the organization. N’Tanya noted, “There was no culture of intentional staff leadership development. In 26 years, there had never been discussion of a succession plan. I think someone brought it up once and everyone said ‘Shhh!’” She saw a need for more deliberate development of staff on an ongoing basis. How could it be made more holistic to build the leadership of the constituency, people of color and low-income people, within the organization moving forward?

Nowadays, when N’Tanya makes new hires, she talks explicitly about succession. Every staff member is viewed as a possible executive director or program director down the line. N’Tanya says she aims to have at least two people on staff at one time who could possibly succeed her. She spends a

good part of her week on direct leadership development or mentoring of her staff. She expects this work will contribute positively to her succession plans.

A great example of N’Tanya’s dedication to staff leadership development took place during her recent parental leave. Executive directors, either deliberately or through life occurrences, may leave the organization for a period of time, leaving space and time for other staff to explore their own leadership and management abilities. In Coleman’s case, there were no immediate interim director candidates within the current staff. However, many staff members were ready to take on more leadership. They became part of a management team that would run the organization in N’Tanya’s absence. They met for six weeks before she left and built up their management skills and team. N’Tanya’s time away from the organization showed that staff were able to run the organization as a team and increased their leadership abilities. It also helped to reveal holes in the team’s skills and what areas would need work for moving forward. This kind of experimentation created an innovated environment, encouraging staff to step further into their own leadership and take on new responsibility.

### **Embedded leadership development of all staff has prepared the organization to grow deep leadership roots and weather major changes.**

Through the organization’s work over the last three years, Coleman is now both stronger internally and externally. Conducting a community-based strategic planning process at the moment of N’Tanya’s transition as executive director created a clear foundation for community involvement as well as trust in her leadership. Embedded leadership development of

all staff has prepared the organization to grow deep leadership roots and weather major changes. Throughout it all, thoughtfulness and intention have paved the way for both effective leadership change and development.

## CONCLUSION

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More and more nonprofits view executive leadership transition as a predictable, natural occurrence within the life of an organization. This has helped social change organizations prepare early on for the possibility of leadership shifts. Now the field needs to integrate internal leadership development in much the same way.

As the stories and voices in this report illustrate, openness to change, collaboration, experimentation; the willingness to look at power dynamics; and a commitment to leadership development in the long term are keys to their success both in leadership change and in accomplishing their mission. Importantly, these organizations that are so focused on eradicating injustice are using a justice lens internally, addressing issues of race, class, gender and generational difference as they think about leadership development and change. Below are recommendations to support social change organizations in their efforts to build strong internal leadership while staying true to their vision and values.

## OVERALL RECOMMENDATIONS TO THE FIELD

1. Prepare for leadership transitions and strengthen the organization for the long term by instituting **ongoing leadership development**. Build and offer opportunities for enhancing leadership throughout the organization, including constituents. Identify and encourage leadership development goals with each individual, rather than make assumptions about a person's leadership aims.
2. Use a **race/class/gender/age lens** when thinking about leadership development and change. Address issues of power and oppression through group dialogue, analysis and goal setting in leadership development and strategic planning. Provide peer-support opportunities for new leaders.
3. Engage **the board of directors** in leadership development and change processes. Find occasions to introduce new staff and constituent leaders to the board. At times of transition, clarify the role of the board in the internal selection process of a new executive director. Create opportunities for the board to build trust with the new director, and to respond to new organizational directions.
4. Value experimentation. Encourage **new models to lead** in different ways; provide "trial runs" of leadership roles through interim positions, or acting leadership teams. Allow for people to try and fail at new ways of doing things.
5. Develop a **sustainable executive director** position by looking at leadership holistically, and sharing leadership skills and responsibilities across different positions.
6. Revisit leadership **succession plans** on a recurring basis, regardless of whether the organization anticipates sudden or far-off leadership change.

7. Establish **clear roles for outgoing and former leaders** that will support the new executive director. Set boundaries with staff and board. Look at the culture of the organization, and make explicit the organization's implicit rules, operations, and policies. Pass on history in ways that can be embedded in the orientation of the organization.
8. Make **mentorship** for new leadership mutual, and doable. Promote mentorship as a two-way street in which both people discuss expectations and learn from each other, crossing generational divides.
9. Foster **trust and transparency** among leadership, staff and board, especially during transitions. Share knowledge, such as job descriptions of those in leadership, and discuss expectations of change processes at all levels of the organization.
10. Seek out **additional resources** from funders and other organizations when there is leadership change. Allocate time for transition planning, and new leadership orientation. Obtain outside support to facilitate group decision-making, update record systems, spearhead hiring processes, or provide one-to-one coaching support for new leaders. Enlist allies to participate in leadership development and transition processes. Continue to learn from others through on-going exchanges that affirm values, break work silos within and between organizations, and deepen movement ties.

## ACKNOWLEDGEMENTS

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Four organizations came together to develop this report as part of a larger effort to build upon our collective experience in leadership development and transition, and to share lessons with the broader social change sector:

### PARTNERSHIP FOR IMMIGRANT LEADERSHIP AND ACTION – PILA

PILA is committed to building the power of diverse low-income immigrant communities to take action on issues that impact their lives. We provide training and technical assistance to organizations and communities to support leadership development and movement- building electoral organizing. We also facilitate peer learning, networking and alliance building among diverse organizations and communities to strengthen a multi-ethnic movement for social change.

### NATIONAL COMMUNITY DEVELOPMENT INSTITUTE – NCDI

NCDI's mission is to build capacity for social change in communities of color and other marginalized communities in a culturally-based way. NCDI's core strategies are technical support and training services, cross-cultural bridge building, and the development and advancement of the capacity-building field. With a visionary board and a diversely talented national network of staff and consultants, NCDI is recognized as one of the premier technical assistance providers for grassroots organizations in low-income communities of color.

### MOVEMENT STRATEGY CENTER – MSC

Throughout history, social movements have brought about the most significant changes for racial, economic and gender justice. It has been the actions of people most impacted by injustice that transformed our society's systems and institutions, as well as our hearts and minds. The Movement Strategy Center brings a cohesive plan to strengthen new ways of building power and creating deep change and build the progressive social justice movement. They do this by supporting individuals, organizations, alliances and sectors to be more strategic, collaborative and sustainable.

### BUILDING MOVEMENT PROJECT – BMP

The Building Movement Project was developed to look closely at the role of U.S.-based nonprofits in building democracy by offering weight, voice and scale to marginalized and disenfranchised populations through social change organizations. The Project works to strengthen the role of US nonprofit organizations as sites of democratic practice and to advance ways nonprofits can significantly contribute to building movement for progressive social change.

Partner team members collaborated in selecting the study's questions and participants, and in developing the report's analysis and recommendations.

Claudia Gomez-Arteaga and Maria Rogers-Pascual – formerly with PILA; Allison Lum – PILA; Dahnes Medora – formerly with NCDI and now with the Technical Assistance Center (TACS); Mahea Campbell – formerly with MSC; Taj James – MSC; and Helen Kim, Frances Kunreuther, and Caroline McAndrews – BMP.

Julie Quiroz-Martinez and Mahea Campbell conducted interviews and wrote several sections of the report. Marnie Brady contributed to the report's editing.

We are indebted to the participating organizations for their time, trust, and candid responses to our survey and interview questions. Their experiences in leadership development and transition were the basis and inspiration for this report:

- Alternatives for Community & Environment (Roxbury)
- Bernal Heights Neighborhood Center (San Francisco)
- Chinatown Community Development Corporation (San Francisco)
- Chinese Progressive Association (San Francisco)
- Coleman Advocates for Children and Youth (San Francisco)
- Data Center (Oakland)
- Families for Freedom (New York City)
- Mujeres Unidas y Activas (San Francisco, Oakland)
- Project South (Atlanta)
- San Francisco Women Against Rape (San Francisco)
- SouthWest Organizing Project (Albuquerque)
- Southwest Workers Union (San Antonio)
- St. Peter's Housing Committee (San Francisco)
- Youth United for Community Action (East Palo Alto)

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We also encourage you to consult the following resources and publications for additional frameworks for approaching generational shifts in leadership:

*Inspiring Activism in the Nonprofit Community*

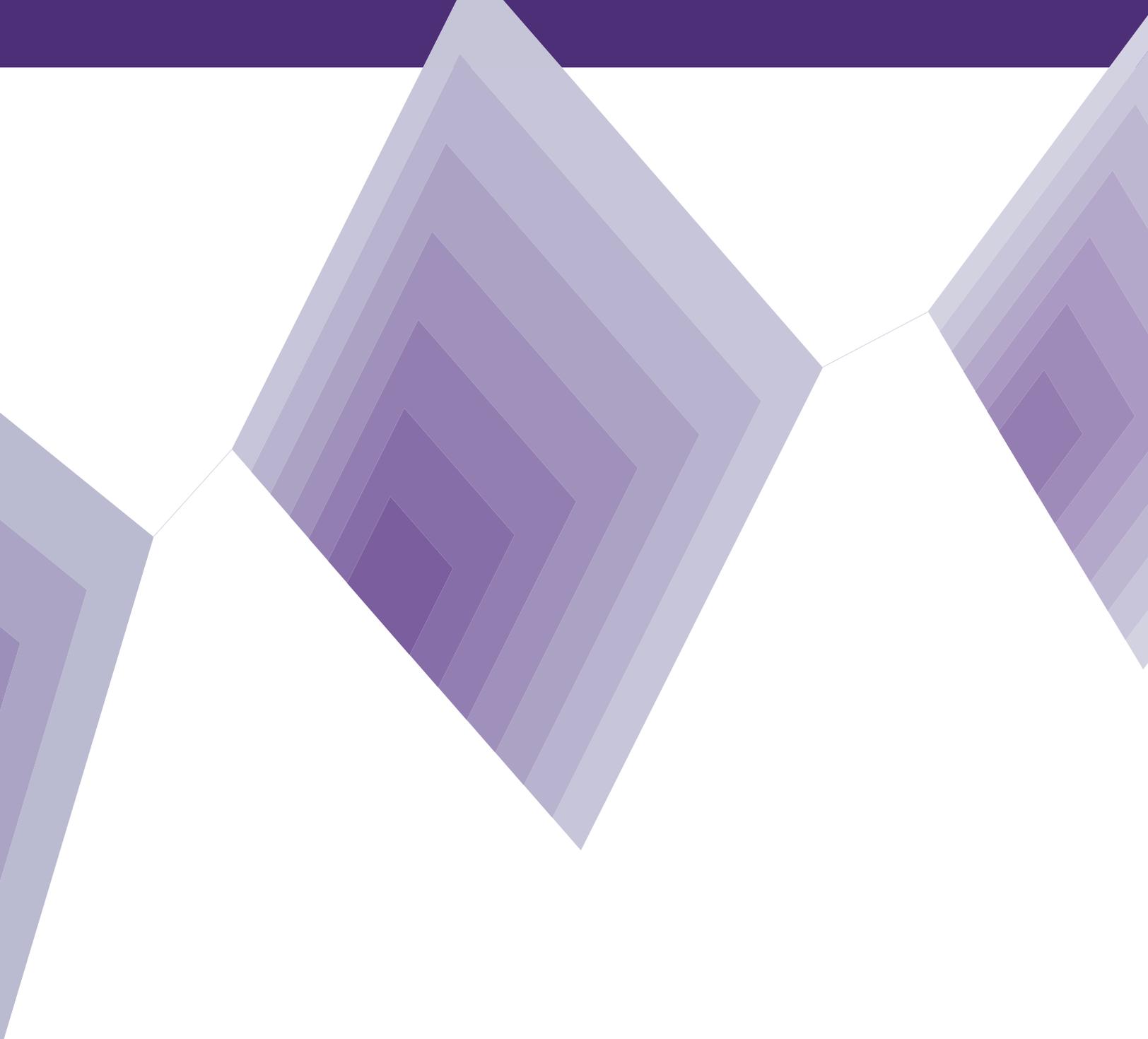
**NEXT SHIFT**  
Beyond the Nonprofit Leadership Crisis

**WORKING ACROSS GENERATIONS**  
INSPIRING THE FUTURE OF LEADERSHIP

**WHAT'S NEXT?**  
Baby Boom-Age Leaders in Social Change Nonprofits

*Inspiring Activism in the Nonprofit Community*

*Inspiring Activism in the Nonprofit Community*



To offer feedback comments, questions, or examples of your work in this area, please contact us:

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Or visit the websites of the project partners:

Partnership for Immigrant Leadership and Action  
National Community Development Institute  
Movement Strategy Center

[www.pilaweb.org](http://www.pilaweb.org)  
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