Older nonprofit leaders struggle alone with making the decision to step down

By Michelle Gienow

Cassandra Flipper has led Bread & Roses, a San Francisco arts group, for 33 years. She’s about to turn 70, and says that now is a good time for a change, both for her and her nonprofit. Her board is making plans for leaving, and Ms. Flipper has attended a retirement-planning seminar for nonprofit executives. Even with such preparations, however, she says the path from being a CEO to whatever comes next is poorly defined for senior nonprofit leaders like her who are ready to move on.

Older nonprofit leaders, she says, “have to manage the process carefully.” But, she adds, “when and how to even start the process of managing the process—unfortunately, that’s just a best guess.”

Many other veteran nonprofit CEOs are also struggling to figure out when to retire, a new study finds—and most of them are not getting much support or guidance from their boards or fellow chief executives because the subject of stepping down is generally considered taboo.

“Leaving well is a leadership function that we don’t prepare for or even feel comfortable talking about,” says Frances Kunreuther, co-director of the Building Movement Project. The New York group helped conduct in-depth interviews of 40 nonprofit leaders from a broad range of organizations as a follow-up to a study a year ago of more than 300 executives who were 55 or older. The project is intended to help nonprofits navigate a staggering exodus of their leaders in the next decade or two as baby boomers—some of whom started and now lead many of the nation’s charities and foundations—decide to step down.

“Right now, leaving is a case-by-case process each person is inventing themselves as they go, because as we all lack a basic outline, much less best practices, of how to approach it.”

Maureen Flaherty never even considered retirement age and created more flexibility to accommodate veteran workers who want to contribute to a cause without the burden of full-time leadership. But older leaders and their boards say it’s not easy to find the time to plan for departures, says the study.

“Nonprofit boards and leaders can be so stressed and busy getting everyday mission work done that long-term exit planning simply doesn’t happen,” says Phyllis Segal, vice president of Civic Ventures and one of the authors of the new study.

“It’s Time to Go”

One consequence of a failure to talk about retirement in the nonprofit world is that it can be hard to figure out when is the best time to go.

In the study, nonprofit leaders who had retired or were getting ready to say they could tell it was time when they began lacking the energy and enthusiasm for work they once enjoyed.

Many said they were worn out by the draining double demands of constant fundraising and the stresses of building a donor base.

And sometimes leaders may decide it’s better to quit while they are ahead.

Alene Valkanas, now 72, retired seven years ago from a 20-year career running what is now known as Arts Alliance Illinois, an advocacy group.

Although she found herself worn down physically and emotionally, she commuted to the office in Chicago from the home she shared with her husband in Michigan, she was hitting a peak professionally. Her organization was in good financial shape, and a national arts-advocacy award had been created in her name.

“I thought to myself, It doesn’t get better than this—it’s time to go,” she says.

Ms. Valkanas prepared for her exit by identifying and then serving as a mentor to her successor, Elizabeth Sala.

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Some Leaders Fear Their Organizations Will Falter Without Their Guidance

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organization through a process to refresh its image, changing
its name from the Illinois Arts Alliance and creating a new
logo and other marketing materials that would help Mr. Joy
differentiate the organization from the one she ran.

“I realized in the 20 years I’d been leading it, I had become so
personally identified with the organization that it was going
to be difficult for my succes-
sor to lead effectively after me,” Ms. Valkanas says. “I’m happy
to say that he is now doing fabu-
ously well.”

Time and Money

The report shows that plan-
ning for a new step after step-
ping down is key to a successful
exit, both for organizations and
for the departing leaders. Non-
profit veterans who left their
jobs without at least a short-
term plan in place reported feel-
ing “lost” and “unsettled.”

Ms. Valkanas notes that al-
though nonprofit leaders tend
to be self-reliant people, leav-
ing can be an especially lonely
process. Support is crucial, she
says, and she suggests reaching
out to peers—both those who
have completed their depar-
tures and those who are still in
their jobs but looking to leave—
for perspective and guidance.

Leaders in the new study who
had already made an exit said
they sought help from thera-
pists or coaches, support groups,
and other sources like churches,
friends, and family members.

Sometimes the unsettl-
ing a departing leader has is
related to monetary concerns.

More than three in four of the
leaders interviewed were con-
cerned about how sound their
financial situation would be af-
ter stepping down.

Many said they were sup-
porting family members, such
as grandchildren or elderly par-
ents, and it affected their deci-
sion about retirement.

Continuing to Give

But even financially comfort-
able leaders interviewed by the
researchers expressed anxiety
about having to develop a differ-
cent identity once they separated
from their job.

Kathy Cloninger, who in 2011
retired as leader of Girl Scouts
USA (with a pension for life) af-
after more than 30 years with the
organization, says she carefully
planned her departure.

And yet, she adds, “I had a nag-
ning core worry no one would
listen to me once I was no longer the leader, that my
impact would be less. And if so,
then what would I do with this
body of knowledge I’ve built and
the passion I still have to make
the world better for girls and
women?”

A year and a half after leav-
ing, Ms. Cloninger says she is
still adjusting to no longer hav-
ing the bully pulpit of her na-
tional leadership role. But she
has also identified ways she can
continue contributing to her
cause—for one thing, by taking
on a new role as vice chair of
the board of the National Coun-
cil for Research on Women.

“You don’t have to invent a
whole new emeritus you,” she
says. “The work you’ve already
done stays part of you even as
you chart your new course.”

“The Leadership in Leaving”
is available free on the Web
site of the Building Movement
Project. The report, the second
of four, will be followed by one
late this year on what nonprofit
leaders expect to do after retire-
ment, and the last one in early
2014 will provide a final sum-
mmary and recommendations. Go
to: buildingmovement.org.

Mary Dickey has retired
from her position as Vice
President for Communication
at Odyssey Networks, the
non-profit multi-faith media
organization, to focus on her
work with various New Jersey
non-profits, including
Bridges and Family Promise.

Dickey became a consultant
to Odyssey in 2001 and
joined the staff in 2006.

TECHNOLOGY

The Atlanta Symphony Orchestra raised more than
$13,000 in a month to digitize its archives.

Web Drive Succeeds for Atlanta Symphony

RUNNING A KICKSTARTER CAMPAIGN helped the Atlanta Sym-
phony Orchestra raise money to preserve its archives and
attract new supporters.

The orchestra has boxes and boxes of video and audio tapes,
photographs, and other documents that it needs to catalog and
digitize. New to Kickstarter, the organization started small. It set
out to raise $5,000 to convert three videos of Robert Shaw, the
group’s acclaimed former music director, leading the symphony in concert
and to buy a scanner and digitize 1,000 photographs.

The group met its fundraising goal in just two days; by the end
of the 30-day campaign it had raised $13,590. Of the 130 people
who contributed, 105 were new donors.

Turning to the public through Kickstarter offers a great way to
gain “immediate feedback” about donor interest in a project, says
Stanley Romanstein, CEO of the Atlanta Symphony Orchestra:
“You can tell very, very quickly whether it’s going to take off!”

For more information: Go to: kickstarter.com.

Text Donors Will Give More. Poll Finds

DONORS who give via text message would like the option of
making larger gifts through their mobile phones, accord-
ing to a survey of more than 20,000 text-message donors.

Eighty-five percent said they would be willing to give $25 to
$50. Mobile contributions are now limited to $10 each.

The survey found that people who make donations via text mes-
sage also give using other methods. Online giving ranked high-
est as the donors’ preferred method of giving, followed by special
events and text messages.

Forty-two percent of survey participants reported annual con-
tributions of more than $250. And roughly 85 percent said that
making a small gift via text message would not make them less
likely to make a larger donation through another method, such as
online or by direct mail.

The study was sponsored by the mGive Foundation, the chari-
table arm of a Denver company that provides text-message fund-
raising services.

To get there: Go to: mgive.org.

Knight Seeks Ideas to Improve Health

INNOVATIVE PROJECTS that use data and information to help im-
prove public health will share $2-million in the next Knight
News Challenge.

Officials at the John S. and James L. Knight Foundation say
they hope to be surprised by the ideas submitted, but they gave
several examples of the kinds of projects they expect to see.

Among them: efforts to let people track their personal informa-
tion and combine it with public data to make more informed
choices about their health.

Knight, which focuses on journalism and media, worked with
the Robert Wood Johnson Foundation, the California HealthCare
Foundation, the Bill, Hillary & Chelsea Clinton Foundation, and the
Health Data Consortium to design the program.

The foundation will accept submissions September 3-17.

For more information: Go to: knightfoundation.org.

—NICOLE WALLACE