



WOMEN OF COLOR EXECUTIVE TRANSITIONS

A TRANSITIONS STUDY WITH PARTICIPANTS IN THE WOMEN OF
COLOR LEADERSHIP RISING PROGRAM A COHORT-BASED
EXPERIENCE FUNDED BY THE FORD FOUNDATION'S BUILD PROGRAM

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INTRODUCTION

Executive transitions have been happening in nonprofits since these institutions were deemed 501c3's in the 1950s. In the late 1990's and early 2000's foundations began to fund research into best practices for organizations whose executive leadership was changing. Some of the most extensive nonprofit executive transition studies were published in 2004¹ and 2009² and provided an in-depth investigation into the challenges organizations, boards, and foundations faced and laid out a model for managing transitions effectively. This research was also informed by a national survey of 2,000 executive directors. Anticipated executive director exits featured most prominently in the resulting write ups and studies and made the argument that the most critical issue at hand was the upcoming change in the guard from baby boomers to Generation X.

- Transition toolkits, written by nonprofit consultants, emerged in the early 2000s and in the 2010s and organizations like Building Movement Project led research into alternative transition methods such as extended overlap³.
- The target readers for these publications were primarily board executives and foundation professionals.
- It is notable that concepts like racial and gender equity were absent from these studies. It wasn't until 2019 that a large study was conducted on the implications of race and gender on nonprofit leadership. But it was the political uprisings in response to George Floyd's murder which catalyzed the nonprofit field to put resources and time into the critical examination of their complicity in racial injustice.
- As organizations began to seek more diversity in their leadership, leaders of color were being recruited to take on roles for which they had been qualified but rarely trusted to fulfill.

¹ <https://www.aecf.org/resources> Tom Adams and multiple authors. Commissioned by Annie E. Casey Foundation

² Managing Executive Transitions: A Guide for Nonprofits. Tim Wolfred

³ <https://buildingmovement.org/reports/the-long-goodbye-advice-how-tos-and-cautionary-tales-for-extended-leadership-exits/> Frances Kunreuther and Stephanie Clohesy

METHODS

The leaders who were interviewed for this report are all current or former executive directors and women of color: Black, Latinx and Asian. They are participants in the Women of Color (WOC) Leadership Rising program, a cohort-based experience funded by the Ford Foundation's BUILD program. The program supported executive directors, identifying as women of color as at least one of their significant identities, who were part of recent executive transitions.

In 2019, with the support of the consulting team (Viveka Chen and Anushka Fernandopulle), Dr. Zuri Tau, of Social Insights Research, provided an evaluation of the program's effectiveness as well as a writing workshop for the leaders. In 2022, she was hired to conduct a study with six of the leaders utilizing in-depth interviewing as the data collection method.

- For this study, participants were interviewed twice for 60-90 minutes.
- These interviews were conducted on zoom
- The recordings were transcribed and analyzed from August to October of 2022.
- In November 2022, preliminary findings were shared with the participants for validation purposes. They provided comments and additional insights before a webinar with Ford Foundation stakeholders in November.
- In January of 2023, this report was provided to the participating EDs for review and final validation.

Dr. Tau presented an overview of the findings and moderated a discussion with five of the six leaders about the research. These findings will be presented in the following sections.

STUDY FINDINGS

FINDING 1: Executive transition experiences for Ford Build participants varied widely

Transition experiences vary widely because implementation & preparation for transition varies.

- Executive director transition best practices are not widely understood in the field. There are resources, however many of them are outdated and most lack an equity lens. The Executive Directors who participated in this study worked with boards that approached the process in varied ways. Some organizations hired consultants to support the transition, others spent most of their energy preparing donors for the transition and on recruitment. An ED observed that in executive transitions, organizational resources are often unevenly split between the exit of the outgoing leader and entry of the incoming leader, with less energy given to the needs of the incoming leader.
- The level of staff, board, and former ED engagement varies. Because each nonprofit's circumstances are unique, most organizations did not rely on toolkits or pre-packaged resources that are available online.

The executive director's transitions had distinct characteristics across 5 indicators:

Internal/External hire	Short/Long ED overlap	Supportive/Unsupportive board	Prepared/Unprepared board	Solo ED/Co-ED
<ul style="list-style-type: none">• Four of the six study participants were internal hires who had been with their organizations for at least 5 years. Only two EDs were external hires.	<ul style="list-style-type: none">• Five of the six ED's were involved in transitions where the exiting ED overlapped for 90 days or less. One organization had over a year of overlap and the former ED is still consulted by the current ED.	<ul style="list-style-type: none">• Five of the six ED's had supportive boards. One of the six reported extreme difficulty balancing the demands of her job while proving herself to the board and navigating biased assumptions about her capacity as a WOC in leadership.	<ul style="list-style-type: none">• Boards may be supportive but unprepared to meet the challenges of an executive transition.• The participants indicated that their boards were at various levels of readiness. Those whose boards were prepared (as indicated by resourcing coaches) reported better experiences.	<ul style="list-style-type: none">• Four of the six EDs were solo EDs and two were co EDs. The co ED model presented different challenges, however the benefits to each individuals' flexibility, ability to share labor, and access to a built in support system were significant advantages.

FINDING 2: Study participants had singular transition experiences that were influenced by 6 key factors:

1. Organizational Culture and Structure

EDs who reported the most satisfying and successful transitions worked in a culture where they were able to try new things, operate from an equity lens, and prioritize work/life balance. EDs who reported the most challenging transitions described their organizational culture as struggling to practice racial and gender equity and as being a workplace where people struggle to trust each other.

Some ED's were solo leaders in a traditional hierarchical structure, while others were in a co-ED structure with an emphasis on shared leadership or leading as a solo ED with a tight-knit admin team. Those who were in a co-ED role spoke of how beneficial the structure was to their adjustment to a new role and managing the inherent strains of an executive transition

2. Board Support

EDs who reported the most satisfying and successful transitions had supportive boards. Support was defined as feeling that their judgement was trusted, that they were empowered to make decisions, and that they were respected for their position, experience and expertise. EDs who reported the most challenging transitions described their decisions being undermined, not being recognized for organizational successes, and being publicly criticized. An ED shared that their board chair would over scrutinize her work and presentations, and despite some of the board expressing support for her and recognizing this harmful behavior, it continued unchecked for months.

3. Staff Support

EDs who reported the most satisfying and successful transitions had staff who were invested in their success. The EDs described these staff as accepting their leadership, being willing to do things their way (as opposed to the way the outgoing ED may have done them) and practicing healthy conflict management. EDs who reported the most challenging transitions described their decisions being

undermined, feeling distrust from the staff, and struggling with unpredictable and unreasonable staff demands. One ED explained that after she was hired, she recognized her staff were in a “wait and see posture” and she often heard “this is the way we do things around here.” It took time for them to trust her. Another ED, who was an internal hire, explained that the staff’s support of her selection made all the difference “Knowing that they trusted me made it easier for me to focus on strategizing around the work.”

4. Transition Resourcing

Transition resources were different for each organization represented in the study. Some of the EDs had personal coaches but for a short time, others had an organizational consultant but no paid one-on-one support for example. ED’s highly valued their transition coaches and indicated that more resources were needed to ensure at least 9-12 months of coaching support. They also explained that staff coaching and board coaching were equally as important.

5. Social/Political Context

One of the EDs explained that she started her role as the pandemic was unfolding and Trump started pushing forward harmful legislation. The political context as well as current events impact how a leader fulfills their role, how much support and resources they need, and the amount of stress they experience in their role. Political context should be considered as an element that can have a major impact on an executive transition.

6. Executive Director's Identity

Race, gender, hair texture, skin color, accent, and sexuality are all factors that influence how an organization’s staff and board will interact with an executive director. Prevailing anti-black stereotypes, patriarchy, habits of the myth of white supremacy, and systematic racism all impact women of color leaders. These impacts are compounded in the lives of people who experience multiple marginalized identities.

FINDING 3: Successful transitions require outside help.

Study participants highlighted the importance of consultants to successful transition outcomes. This included individuals like:

- Executive Transition Consultants
- Executive Coaches
- Staff Trainers
- Diversity Equity and Inclusion (DEI) Professionals

One of the organizations in the study, had a coach for the incoming ED, the board, and the staff to help manage the transition. The ED of that organization reported high levels of satisfaction with the transition experience. In contrast, another ED's organization did not secure a consultant and seemingly because she was an internal hire, assumed less resources would be needed to support a healthy transition. This was not true, and the ED eventually brought in a coach to facilitate the process.

The EDs explained that external support serves the following purposes:

- Normalizing transitions
- Providing reassurance for staff close to the outgoing leader
- Providing tools for managing conflict
- Teaching practices to support incoming leadership
- Identifying organizational challenges (culture/policies/etc.) that may make it difficult for new ED to thrive

FINDING 4: Women of Color leaders have overcome major social barriers before becoming executive directors.

Study participants have developed high levels of resilience over years of overcoming challenges such as structural and institutional racism, poverty, xenophobia, sexism, and anti-blackness. These experiences provide women of color EDs with a unique perspective on the challenges their communities are facing. Yet, high

resilience does not equal higher resistance to the effects of stress and injustice. Organizations who want to hire and retain BIPOC leaders should:

- 1: Implement policies to make it possible for EDs to prevent burnout (for example; funding mental health, services, funding for non-medical wellness expenses, paid vacations, etc.)
- 2: Actively examine how the cultural norms that are accepted in the organization may promote inequity in their workplace (e.g., hire a consultant firm to support organizational change, conduct an equity assessment, request ongoing feedback about how BIPOC women experience office culture)
- 3: Create opportunities for ongoing learning about structural and systemic barriers for BIPOC leaders as well as creating a more equitable workplace

FINDING 5: Women of Color leaders have unique experiences that differ from their white or male counterparts and benefit from affinity groups and programs that provide peer and professional coaching and support.

WOC EDs encounter cultural norms that set expectations for how they should show up in their role, and these expectations are gendered and racialized. All the EDs in this study reported ongoing challenges with managing biased expectations regardless of the racial makeup of their organizations. One ED described herself as having “No room to stumble”. Another described being impacted by negativity bias from staff and board. Others report that they are expected to provide mothering or practice caretaking in their leadership, an expectation that doesn’t exist for their male counterparts.

All the EDs in the study noted that having coaching and a cohort of women of color navigating similar experiences made their transition easier. One ED shared “Having an ED of color community has been the most helpful practice that has allowed me to sustain in this position”.

CONCLUSIONS

Additional participant reflections

#1. Power Differentials must be navigated: "The 'Us versus them' mindset begins so quickly, Suddenly I'm 'them'. Managing new power differentials is a challenge. There is now so much power behind our words that wasn't there before. Brainstorming becomes a directive when before they were just my ideas."

#2. Executive transitions are hard even when you have been a part of the organization for a long time. "I spent 6 months just uncovering everything I didn't know even though I had been in the organization for years...challenges that only admin knew about became my responsibility. It was like peeling an onion."

#3. Staff concerns should be centered in transitions: "Staff feel like they have a lot to lose in the transition. I experienced several people leaving because they were closely aligned with the ED. And there was power hoarding and gatekeeping by those who held it before the transition based on people's insecurities and fears. We could have given people more reassurance in advance if we knew this was an issue."

#4 Outgoing ED's can set the transition tone. "The role of an outgoing ED should include creating space for incoming ED's to create a pathway for change. They should be messaging 'change is good and important and I trust these people to lead this new chapter' instead of 'everything's going to be okay'."

#5 The board's role shouldn't be underestimated in transitions. "Within a transition, a healthy consistently supportive board is important, an unsupportive board is toxic. Boards should educate themselves on transitions and be sure that there are resources for incoming leaders."

#6 Foundations should actively play a role in supporting transitions through funding, fellowships, and examination of reporting expectations: "Foundations seem to be listening and cognizant of how their behaviors

have aligned with habits of white supremacy. Funders can get ahead of the fear that transitions mean a loss of funding. Show a commitment to the organization and not just the ED.”

#7 Identity is paramount to transition experience: Understand that the ED’s identity influences their pay, treatment, and overall leadership experience. “Colorism and anti-blackness influence people’s ideas of capability to lead and make it even more challenging for Black women in ED positions.”

Future Opportunities

Post the uprisings and national racial reckoning of 2020, nonprofits boards and foundations will continue to seek out leaders of color, many of whom will be women, to lead their organizations on the long and steady journey to social justice. The injustice and systemic barriers these leaders encounter don’t disappear inside of our institutions. The six current and former executive directors who participated in this study have taught us that transitions are inevitable and that they are harder than they should be for women leaders of color. More research, targeted programs like BUILD, and the provision of ongoing resources to support these leaders is a tangible investment in the changes Ford is working for.