

# In Support of Those Who Take the Leap

## Lessons on Leadership Transitions from the Open Society Foundations' New Executives Fund

In 2019, with the help of organizational strengthening consultants Martha Farmelo and Victoria Wigodzky, the Open Society Foundations' New Executives Fund launched an internal learning project to explore the deep knowledge and experience that has accumulated within its community of executive leaders. This project resulted in a report entitled *In Support of Those Who Take the Leap: Lessons on Leadership Transitions from the Open Society Foundations' New Executives Fund*. The following excerpt is taken from that report.<sup>1</sup>

### Top Advice for New Executive Directors from Their Peers

In light of the challenges and opportunities described in the report, this section offers new Executive Directors advice from their peers, inspired by a variety of sources.<sup>2</sup> The report authors believe these lessons are a welcome input to any incoming Executive Director in just about any organization around the globe.

#### **Remain Clear that *You Can Do It!***

- Take a deep breath! It will be hard, but you can make it. Listen to and trust yourself, your instincts, vision, and purpose. Remain confident in your decisions. You were hired for a reason and you are already good enough
- The challenges are real and every Executive Director will have their unique challenges.
- The work can be discouraging and frustrating. To be transformative, be internally driven and keep your head up.

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1 The section excerpted here is Top Advice for New Executive Directors from their Peers (from Part One, Section E). The full report and related materials will be made available at the [Publications](#) section of the Open Society Foundations website. To contact the New Executives Fund, email [nef@opensocietyfoundations.org](mailto:nef@opensocietyfoundations.org).

2 The first of these sources is a short document entitled "Advice and Tips from the New Executives Fund Community to a New Executive Director" that the New Executives Fund compiled from eight grantees in late 2017. In addition, during a participatory exercise at a November 2019 Executive Director convening in Barcelona, Spain, the approximately 44 directors in the room were asked to identify the single most important thing they wished someone had told them when they started their tenure. Finally, input is incorporated from Executive Directors surveyed and interviewed on their biggest learning associated with the New Executives Fund initiative and lessons that they would take to future jobs.

- Extend yourself some grace. The first year is tough! And it does get better. For Executive Directors of color inheriting an organization founded and/or run by a white leader, the struggle will be more difficult. You will be held to a higher standard.<sup>3</sup>
- Keeping a healthy personal and mental health life is important for you and for the organization.
- Have a Plan B-Z. Prepare for the worse (it will come—and go), but always work, hope, and create for the best.
- Get comfortable with the uncomfortable. There will always be more things to do than time or resources allow. Be OK with not getting it all done at once.
- Own that organizations are a living and breathing thing. Make the changes your own.

### ***Strategies for Proper Orientation and Getting Started***

- Many Executive Directors do not experience any orientation process whatsoever. If there is no orientation process in place, request it.
- Engage the board and staff to join you in designing and planning a comprehensive and participatory orientation before your start date. This process reaffirms support for your vision as incoming Executive Director.
- There is no honeymoon period, so the best thing to do is focus on thinking about and organizing your own priorities and identifying areas where you need support, and where you will get it within a limited timeframe.
- Understand fully the organization you receive. Ask all the questions you need! Knowing exactly where you are starting will help you plan and get where you want to be.
- Get the “nasty” stuff done as quickly as possible, whether or not the organization is at risk: letting go of staff, finances, structure, legacy problems, changing the board.
- It is OK to take some time and space at the beginning to learn, be thoughtful and communicate why you are doing things in a particular way. There is so much pressure to set unrealistic benchmarks and achieve them all in three months, or everything will fall apart. You do not have to prove yourself in the first three months or get everything right in the first year.

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3 Authors' note: this would also apply to other leaders from historically marginalized or oppressed groups inheriting an organization founded and/or run by a person from the dominant culture or group in a given context.

### ***Make Time to Reflect and Gather Information***

- Create a personal work plan for the first six months and gather data to inform the direction you'll take.
  - Protect time and space to think, reflect, meditate, and work with friends. You do not need to be available to all people at all times.
  - Meet your partners and beneficiaries.
  - Get on top of the budget.
  - Conduct a participatory organizational development assessment, for self-awareness and shared vision.
- Especially if you are an external hire, figure out how to understand organizational culture and get an honest assessment and diagnosis.
- Start slow to go fast. Most of us inherit crises where often we have to act quickly. If we do not know it and cannot see it, that is a big risk.
  - Always be ready to listen, even if you are itching to jump in. Have patience for self-reflection and for challenging yourself and others within the NGO sector.

### ***Implement Your Vision for the Organization***

- Do not lose your vision. Know where you want to take your organization and be clear and transparent about it. Recognize that you will have to fiercely believe in it to move it forward. But do not forget that your plans will require constant adaptation. Be open to input and help along the way.
  - Understand that not everyone on the staff or board is necessarily walking in the same direction as you are as Executive Director. It is your job to get everyone on the same page, heading to the same point and in the same direction.
  - Include participatory processes so that others take ownership of changes.
- Balance internal and external needs, program and organizational priorities, strategic and operational work.
  - Learn the importance of strategic focus, teamwork and inclusivity, while not losing sight of the organization's vision of outreach and global impact.
  - Innovate and take calculated risks, no matter how unconventional.
  - Be aware that implementing your vision often changes not only the organization, but will also likely impact you personally, deepening and widening your life perspective.<sup>4</sup>

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<sup>4</sup> This was shared by someone who implemented a vision that incorporated a lens of diversity, anti-oppression, and racial justice into the organization's internal and external work.

### ***Shifting Organizational Culture***

- Early on, define the work culture you want to create.
- Understand the organizational culture of the staff before you try to change it. Do not dismiss it, and understand why you want to change it.
- Organizational culture shift takes a very long time. Pre-existing personal dynamics can be unseen and difficult to unpack. Navigate them with humility and patience with people and the process.
- Find the balance between freedom and flexibility on the one hand, and order and control on the other.
- Change is hard and can be painful and bring up a lot of emotions. The stress

and emotional side of organizational change can be overwhelming, especially for an introvert. It is important to set your own boundaries as Executive Director and not become a martyr who is overwhelmed and overwhelming for others in the organization, especially if you belong to the community you serve. Do not merge into the organization, which can lead to burnout.

- Make timely succession planning an integral part of your organizational culture. Leadership transitions and succession planning should be part of the DNA of the organization (whether the funder asks for it or not).

### ***Address Staffing Issues and Letting People Go***

- Top priority is getting the right people on the bus: move first and foremost on that. Do not try to do too many jobs at once and hire the people you need right away. Get on top of other staffing issues: dysfunctions, unhappy staff, staffing gaps, etc. Be aware of toxic behaviors that can impact the organization and your ability as Executive Director to implement your vision.
- Hire top-level leadership first, to help set the tone for the vision you want to realize.
- Understand emotional intelligence and prioritize that in hiring and internal dynamics. Screen for it in interviews.

- Recognize amazing talent within the organization and take care of them to retain them.
- Meet with each staff person regarding their work, ambitions, and suggestions for focus areas for the first six months. Keep career development in mind. Figure out individual staff's strengths and weaknesses, so you know how to empower them.
- Cultivate a team environment.
- Everyone waits too long to let someone go. Move quickly. Letting someone go who needs to go is a better decision for you and the organization than keeping them in.

- Letting someone go can be done in a responsible and compassionate way so that the person can move on to something that is good for them and also for the organization. Letting people go can be challenging in some

contexts with very good employment laws. Those laws are important, and we [Executive Directors] must learn to balance that [with what the organization needs].

### **Connect to the *Support You Need***

- It is not enough to know about the mission of your organization or to be an issue expert. Being an Executive Director requires management skills that may be very challenging: human resources, finances, managing governance and boards, reaching out to stakeholders, dealing with the media, etc. Identify areas in which you need help and find support, training, and coaching soon for areas that you need to strengthen. Invest in skill development for yourself. It is OK to ask for help!
- This can be a lonely job, so make connections. Develop or find a support network where you can be

honest about your challenges and go for advice: a group of peer Executive Directors to share common experiences, a coach, people within your team and board, etc. Even informal, more intimate networks. These connections will hold you.

- Find other Executive Directors early on and hold them close! You must build an Executive Director peer network, even if you have to do it on your own. Connect to them in a group, or one-on-one, and maintain that connection or network for advice and support. Talk to them about institutional challenges, not just program work.

### **Regarding Your *Board of Directors***

- If you do not have or cannot generate agreement with the board, get out. Boards are often the reason why Executive Directors leave.<sup>5</sup>
- Spend a good amount of time with your board the first year; it will pay off later. Bring board and staff together. Talk to your board members, especially the chair or president. Understand the board's roles and responsibilities and move toward alignment. Assess the board's skills for supporting the organization, and be sure to pay attention to culture fit, not skills alone.

- Board members have varying interests and strengths. Learn what those are and why they are on the board—then be strategic in how to get what you need from them.
- Be aware that board renewal and restructuring—to accompany changes in staff and organizational culture—take a lot of time and effort. Do not underestimate the time and effort required to transform your board!

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<sup>5</sup> Executive Directors mentioned particular discrepancies or misalignment with the board regarding fundraising responsibilities and expectations; vision; and program and strategic focus, among others.

### **Ensure *Freedom from Your Predecessor***

- [Take necessary steps to] ensure that the previous Executive Director lets go!
- In some cases, a predecessor can remain in the scene (and become a real

obstacle or difficult person to manage), even years after the new Executive Director takes over.

### **Build Your *Donor Relations***

- Understand that fundraising is as much about building relationships as it is about the specifics of your program.
- Meet one-on-one with every funder and major donor within the first 60 days.
- Transitions create significant costs: ask your closest donors to increase their giving significantly just to maintain the same level of service. Be honest about the challenges.

- Communicate with your donors that innovations require a financial push to materialize.
- Be an excellent steward of the organization's resources with self-discipline, focused on real institutional funding. Do not go after unsustainable initiatives [even if they generate short-term project funding].
- Share with your donors that philanthropy can play a big role in helping new leaders take risks, grow, and develop.

### **Remember to *Communicate Success***

- Celebrate the win, again and again. Tell the story of what the change is.