

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 Wigodzyk, 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.¹

Executive Summary

As a rule, transitions in executive leadership are a critical moment in the life of an organization, presenting risks but also an enormous window of promise and opportunity—especially when the incoming leader is a first-time or less experienced director. Yet, the field of philanthropy provides insufficient support to help grantees undergo these transitions in ways that leave organizations and their people strengthened and thriving.

Between the years reviewed by this report (2013-2020), the Open Society Foundations' New Executives Fund (NEF) has supported 121 newly appointed Executive Directors around the world with two-year unrestricted funding and peer learning opportunities, including an annual grantee convening. The New Executives Fund's mix of flexible funding and community support is in line with the idea that organizational resilience is a function of multiple elements and resources. This report provides learnings on the impact of the New Executives Fund to date, as well as more general insights on the opportunities and challenges presented by leadership transitions, and how these might be impacted by such

¹ The section excerpted here is the Executive Summary of the report. 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.

funding. It centers the experiences of the Executive Directors themselves, with input from some of their board and staff members, Open Society Fellowship nominators, and New Executives Fund staff.

This summary contains the highlights of the findings and offerings culled from the study participants. The report contains key messages for the donor community on leadership transitions and on philanthropic culture and practices more broadly. Donors are invited to ask themselves: if you are 100 percent honest about what might apply to you or your organization, what learnings, reflections, questions, and concerns do you take away? What actions, large or small, might you consider taking as a result of this reflection?

What is at Stake

Support for leadership transitions is not a luxury or an add-on, but a critical, unattended necessity and a major opportunity to strengthen individual organizations and the social justice field as a whole.

The opportunities presented by leadership transitions include things like innovative thinking; expanding relevance and impact; reorganizing around structural inequality and affected communities; enhanced funding; and rapid changes spurred by adverse conditions. The challenges are also enormous: general stress and feeling overwhelmed from internal and external pressures; financial sustainability and crises; needed shifts in organizational dynamics; entrenched white supremacy and other oppressive cultures; staffing—including retention, hiring, and letting people go; or recouping visibility and relevance.

The New Executives Fund was created originally in response to the lack of attention to and support for leadership transitions and the enormous costs for individuals, organizations, and the field of nonprofit social change more broadly. The flipside of this need is the opportunity to address leadership transitions with a variety of forms of support.

While, of course, subject to improvements, the New Executives Fund has been extraordinarily effective in addressing the challenges of leadership transitions, making a positive difference in the lives of dozens of Executive Directors and their organizations. But there is much more need than it can begin to meet, and it cannot do so alone. There could be dozens of New Executives Funds and/or actions within the donor community to “mainstream” sensitivity to, and support for, leadership transitions as an integral part of overall mandates and grant making.

What Executive Directors Need Most

New Executive Directors need support as they face promise, hopefulness, and opportunities, while also experiencing intense levels of stress and multiple constraints that those of us who have never been in their shoes cannot easily imagine. What do they need most?

1. New Executive Directors need funders to understand and pay special attention to leadership transitions, and to step right up to the plate with tangible and intangible support.

One Executive Director we spoke with said, “Recognize your power! A donors’ response to a leadership transition can make or break that transition.”

Funders must build “transition-thinking” into their programs. Executive Directors also need donors to step forward with solid financial and other types of support instead of delaying or cutting funding, or any other form of “waiting and seeing.” **They need funders to open doors**—to potential new donors and to other organizations and leaders—and to share tools and resources for leadership transitions and other organizational challenges, especially adapted to the Global South.

2. Unrestricted funding is critical—as is trust in new Executive Directors.

Unrestricted funding is rare yet critical for the flexibility for Executive Directors to take the organization in exciting new directions; address internal and external challenges, foreseen and unforeseen; and focus on their own development, staff development, or other organizational strengthening efforts. “The biggest expectation for this study is to plant that seed in other donors,” said one Executive Director. This is about changing the culture of philanthropy. Executive Directors want donors to understand the problems of project funding and trust them to be good stewards of funds and to make tough decisions, while remaining accountable.

3. **New Executive Directors need psychological safety and empathy.**

Financial support is a powerful and highly needed vote of confidence, but it is not enough. **Executive Directors also need emotional support, including empathy and patience, and to feel accompanied as they take bold steps and make difficult decisions. Grantmakers need to inquire on that level and ensure that they feel prepared to make that an integral aspect of the scope of their support.**

As one Executive Director stated: “Reassurance is a two-way street: it is not only the new Executive Director’s job to reassure you; it is also the donor’s job to reassure the new Executive Director.” Incoming Executive Directors request that donors provide honest feedback early on, and be mindful of the level of pressure that Executive Directors are under.

4. **New Executive Directors need each other for peer learning and support.**

New Executive Directors expressed a pressing need for opportunities to network with their peers to know that they are not alone in facing their difficulties, that all Executive Directors face similar issues, and that they learn from their peers how to foresee and address organizational and personal challenges. As a rule, Executive Directors highly value convenings focused on collective problem solving and relationship building. Funders can convene sessions for grantees, sponsor sessions at conferences, or create other mechanisms to encourage peer-to-peer connection and learning.

Diversity, Equity, and Inclusion and “Historic Firsts”

Focusing on diversity, equity, and inclusion around leadership transitions, as in all philanthropy, is a must. From a framework of justice and equity, **funder decisions about whom they choose to support (directors and organizations), what levels of support are provided to whom, and how they interact with their grantees all matter deeply and require thoughtful examination.** This shows up in everything from overall and relative grant size among grantees to the eligibility and selection criteria for supporting new executives. **The choice to support a critical number of what the New Executives Fund refers to as “historic firsts”—the first Executive Directors to come from communities historically excluded from leadership,** such as women and trans people of color, first-generation immigrants, or persons from certain ethnic groups—**can have real impact on those individuals and in the field.**

Top Advice for New Executive Directors from Their Peers

Participating Executive Directors shared their top advice for their peers. Just a few highlights:

- **Listen to and trust yourself.** Remain confident in your decisions. You are good enough!
- **Take time to reflect and learn.** You do not need to prove yourself in the very first months.
- **Be clear on your vision.** Believe in it fiercely and use participatory approaches to get others on board.
- **Understand the existing organizational culture early on and define the change you seek, why, and how.** Know that organizational change takes time.
- **Address staffing issues head on and do not be afraid of letting people go.** Retain the amazing talent.
- Get the skills and connect to the support you need. **Find other Executive Directors and hold them close!**
- Spend time with your board. **If you cannot generate agreement with the board, get out.**
- **Build relations with your donors early on.** Tell them what you need.

Selected Questions for Further Reflection

Based on the report findings, the authors invite the donor community to reflect upon what it would look like to mainstream support for leadership transitions across their grant-making mandates and structures. Likewise, how might some of the contributions that are the hallmark of the New Executives Fund (unrestricted funding, peer connections, etc.) be achieved by different donors without necessarily replicating the New Executives Fund model per se?

Donors could also reflect on how they might best meet Executive Directors' needs for non-financial support. What orientation or training, if any, should foundation staff receive in order to effectively and responsibly play a supporting, empathic role focused on relationship building beyond funding? Finally, donors could also think deeply about the imperative and the opportunity for transforming the landscape of social change leadership by targeting transition resources for “historic firsts” or, more broadly, directors from groups directly impacted by structural inequality—and the implications of not doing so.

As authors, we have learned an enormous amount from all the voices we heard and have been both inspired and humbled by the experience. We are deeply thankful for everyone's generosity of thought and spirit—especially the Executive Directors—throughout this initiative. We are grateful to New Executives Fund staff for their guidance, collaboration, and trust. We hope the report leaves readers with energy, motivation, and a sense that executive leadership transitions are healthy and can be experienced and supported in ways that are life-giving and that build and strengthen our movements for profound social change.
