

INDEX

A

Accenture, 239
Accountability: founder's, 59–61; setting up
 between board and executive, 162–163
Action planning notes and commitments, 322
Adams, Tom, 61
Advocates, 225–226
Age diversity. *See* Generational diversity
Alcoholics Anonymous, 46, 47–48
Alignment: during Prepare phase, 144–145;
 human resources, 232–237; staff, 144–145, 201;
 succession planning for organizational, 201
Alliance for Nonprofit Management, 294
American Hospital Association, 87
Anger, 38–39, 44
Annie E. Casey Foundation, The, 12, 65, 81–82,
 106, 107, 114, 132, 133, 281, 284
Applegate, B., 83
Appreciative inquiry, 40–41
Asakura, V., 83
Associated Black Charities, 88, 91
Audits. *See* Sustainability audits

Authority: establishing in Prepare phase, 143;
 founder's, 59–61

B

Baby Boomers, 104, 106, 107, 109
Backlund, A.N., 58, 59
Barner, Robert, 239, 240, 244
Beattie, Melody, 48
Beliefs, 46
Bench Strength (Barner), 239, 240, 244
Bench strength reviews, 236, 250–255, 267
Berger, Dorothy, 243
Berger, Lance, 116–117, 243, 251, 257
Berthoud, Heather, 84, 100
Block, S. R., 60
Board of directors: adopting emergency backup
 plan, 185; aligning, 144–145, 201; attitudes
 about diversity, 319–320; challenges of
 generational diversity for, 107; choosing interim
 executive, 71, 136–137; choosing succession
 planning terms, 174–175; conversations about
 diversity with, 95–96; cultivating and educating

- members of, 167; decision making during Pivot phase, 151–152; defining role in succession policy, 186; developing emergency backup plans, 181–185; diversity and inclusiveness of, 94; emotions surrounding leadership transitions, 33–35; ensuring clarity between new executive and, 161; finding diversity champions, 92–94; focus of questions for, 26; generational diversity on, 112–113, 118; how to use this book, 23; increasing racial and ethnic diversity of, 95–102; initiating accountability between executive and, 162–163; planning for founder succession, 67; readiness for executive's departure, 199–201; reviewing emergency backup plan, 182, 185; risks during executive transitions, 158–159; salaries of, 30–31; selecting and supporting leaders of color, 97–98; serving on search committees, 138–139; shaping priorities for new executives, 139–140; starting sustainability strategy sessions, 208–210; supporting leaderful organizations, 263–265; supporting new executives, 139, 162; sustainability actions for, 21
- Bolt, J., 226
- Book clubs, 266
- Boundary setting, 48–49
- Bozeman, B., 226
- Bridges, William, 17, 34
- Bridgespan Group, 12
- Brinckerhoff, Peter, 103–105, 107, 109, 111, 112, 118, 119
- C**
- Candidates: defining characteristics of, 153–154; hiring, 153, 154–155; making offer to, 155–156
- Capacity-building providers, 25, 26
- Career mobility, 10
- Carnegie, Dale, 47, 227–228
- Center for Applied Research, 26
- Center for Creative Leadership, 50, 225, 239
- CEO. *See* Executives; Leaders
- Championing diversity, 92–94
- Change: creating pull for, 25–26; difficulties transitioning to generational diversity, 109–110; emotions around, 29–32; fear of failure associated with, 36–37; financial fears and, 36; incremental organizational, 267; physical exercise and, 45; preparing for, 172; sadness and withdrawal, 37–38; stages of grief and, 44–45; transition vs., 135
- Charan, Ram, 225, 245
- Chief Executive Transitions* (Tebbe), 127, 128–129, 137, 152–153, 285–287, 288–291
- Coaching, 67, 162, 226, 266
- Coaching* (Bolt), 226
- Collins, Jim, 228
- Communications: about race, 89–91; alleviating fear, 138–139; announcements about departing executives, 143; announcing emergency backups, 184; conversations with board about diversity, 95–96; difficulties with generational diversity, 110; during executive transition management, 213; plan for new executives, 290; skills needed for search committees, 137–138; sustainability actions for, 21; when facilitating diversity, 101; writing position profile and search plan, 145–146; writing succession policy, 185–186, 207–208
- Community: generational diversity of service recipients, 119; generational makeup of, 118; impact of economic and racial disparities on, 88
- CompassPoint Nonprofit Services, 10–12, 133, 134, 205, 226, 281, 284, 294
- Competency: assessing, 223–225; defining cultural, 234–235; requirements for leader positions, 233
- Consultants: assessing fit with organization, 295–296; finding, 294–295; when to hire, 292–294
- Consumers: influence of racially diverse, 87
- Cooperrider, David, 40
- Corvington, Patrick, 107
- Covey, Stephen R., 119, 223
- Cross-training plan for leaders, 185
- Cultural competency: assistance from consultants in, 294; defining, 234–235
- Customers: profiling primary, 94
- D**
- Daring to Lead* (CompassPoint Nonprofit Services), 11, 13, 134, 173
- Demographics: racial and ethnic, 85–86; using during executive searches, 97
- Denver Foundation, 82
- Departing executives: ambivalence of, 197; departure announcements for, 143; maintaining departure plans, 213–214; preparing board for change, 199–201; readiness for departure, 198–199; relationships with, 135–136

- Departure-defined succession planning: about, 69–70, 189–192; alignment in, 201; benefits of, 194–195; directors' readiness for executive's departure, 199–201; executive readiness for departure, 198–199; failures in, 197; Implement phase in, 196, 210–214; increasing diversity during, 99–100; maintaining departure plans, 213–214; phases of, 195–197; Plan phase in, 196, 208–209; Prepare phase in, 196, 197–201; reflection questions for, 215–216; Review phase in, 196, 201–208; success factors in, 192–194
- Depression, 45
- Detachment, 47
- Difference, The* (Page), 80–81
- Directors. *See* Board of directors
- Diversity: achieving, 102–103, 118–120; assistance from consultants in, 294; attitudes about, 319–320; challenges increasing, 89–92; championing racial and ethnic, 92–94; defined, 77, 82; defining practices supporting, 234–235; differences among generations, 103–107; difficulties with generational, 109–110; diversity inventory, 318–320; effectiveness of racial, 85–88; exploring in Prepare phase, 145; focusing on organizational mission, 96; improvements with generational, 108–109; inclusiveness and, 82–84; inequities in race, class, and ethnicity, 84–85; lack of leadership, 13–14; leaders for addressing racial disparities, 86–87; making organizational priority, 167; in nonprofit workforce, 9; outcomes of increasing, 81–82; racial and ethnic demographics, 85–86, 97; redefining nonprofit executives for younger leaders, 120; reflection questions for, 121–123; within leaderful organizations, 77–82. *See also* Generational diversity
- E**
- Education: effect of leadership diversity on, 86–87; executive, 266; nonprofit management programs, 310–311; search committee and director, 167
- 8th Habit, The* (Covey), 119
- “Either/or” choices, 6–7
- Embracing Cultural Competency* (St. Onge and others), 83–84, 222
- Emergency backup plans: about, 174; communicating, 184; completing, 177–178, 185; as component of succession plan, 187; designing cross training for, 185; detailing executive's functions in, 183; determining backup staff, 183–184; developing, 181–185, 207–208, 265; for founders, 68–69; generational diversity and, 113–114; hiring consultants to assist, 293–294; for leaders of color, 98–99; racial and ethnic diversity in, 94; templates for, 182–183
- Emotional check-in barometer, 321
- Emotional Intelligence* (Goleman), 42
- Emotions: associated with transitions, 135; cultivating self-awareness of, 50–51; effect of, 29–32; emotional check-in barometer, 321; excitement, fear, and anxiety, 35–39; founder's, 61–62, 133; frustration and anger, 38–39; grieving, 44–45; handling individual and group responses, 39–50; joy and peace, 39; leadership programs addressing, 50; managing with emotional intelligence, 42–44; perceiving, 42–43; physical exercise and, 45; reducing anxieties, 175–177; reflection questions on, 51–52; resiliency rituals managing, 49–50; sadness and withdrawal, 37–38; spiritual or religious practices addressing, 45–46; surrounding transitions, 33–35; Twelve Step wisdom for, 46–49; understanding and managing, 43. *See also specific emotion*
- Employees: founders as, 59; generational diversity of, 118; leadership diversity and retention of, 87–88; meeting with before accepting transition position, 73; number of nonprofit, 8–9
- Ethnic diversity. *See* Diversity; Leaders of color; Racial and ethnic diversity
- Every Person Culture, 116, 117
- Excitement, 35–36
- Executive Consulting for the Nonprofit Sector, Inc., 284
- Executive Service Corporation, 284
- Executive transition management (ETM): about, 127; accountability between board and executive, 162–163; benefits of, 133; characteristics of successful transitions, 132–134; coaching supporting, 67, 162; decision making about transitions, 140–142; defined, 17; development of, 125; ensuring clarity between new executive and board, 161; examples of, 70–71, 126–127; generational diversity in, 112–113; implementing, 212–214; increasing racial and ethnic diversity, 95–102; key transition decisions, 134–136; management

- teams for, 67–68; phases of, 113; positive beginnings with, 135, 159–161; preparing organization for, 65–66; process overview, 276; questions for sustainability audit, 305–308; reflection questions for, 168–169; relationship with departing executives, 135–136; retaining new executives, 140; supporting new executives, 162; types of transitions, 127, 128–129. *See also* Leader development; Pivot phase; Prepare phase; Talent management; Thrive phase; Transitions
- Executives: actions during Implement phase for, 212–214; choosing succession planning terms, 174–175; departure-defined succession planning, 69–70; detailing key functions of, 183; emotions about transitions, 33–35; finding interim, 284; founder, 53–56; hiring consultants when leaving, 293; how to use this book, 22–23, 23–24; interim, 71, 136–137, 281–283, 284; leading turnarounds, 56, 59; managing transitions of, 70–71; preparing board for departure, 199–201; readiness for departure, 198–199; redefining nonprofit, 120; relationship with departing, 135–136; resiliency rituals for, 49–50; sabbaticals for founders, 68; sadness and withdrawal of, 37–38; searching for, 152–153; using talent management comparative matrix, 312–313; welcoming new, 139. *See also* Candidates; Founders; New executives
- Expanding Nonprofit Inclusiveness Initiative (ENII), 82
- F**
- Failure: fear of, 36–37; in founder transitions, 55
- Fast Company*, 226
- Fear: about increasing diversity, 100; alleviating, 40–41, 138–139; detachment from, 47–48; excitement and, 36; of failure and reputation, 36–37; financial, 36; loss of power, control, or status, 37
- Feeney, M. K., 226
- Finances: budgets for leadership development, 268–269; financial fears, 36; leader's money issues, 48; nonprofit operating costs, 12–13; phased retirement of founders and, 66; reviewing during succession planning, 205; sample entry plan for, 289; sustainability actions for, 21. *See also* Salaries
- First Hire transitions: about, 129; examples of, 131; Pivot phase examples in, 157; Prepare phase examples in, 148; Thrive phase examples for, 165–166
- Following the Leader* (Redington and Vickers), 63
- Founder syndrome, 56, 58, 62
- Founder Transitions* (Adams), 61
- Founders: about, 53–56; ambivalence of leaving, 61–62, 133; associated with white privilege, 56; authority and limited accountability of, 59–61; continuing contact with organization, 62, 65–66; defined, 55; departure-defined succession planning for, 69–70; developing sustainability review and audit, 69, 203–207; emergency backups for, 68–69; entrepreneurial characteristics of, 60; executive sabbaticals, 68; hiring consultants when leaving, 293; how to use this book, 22–23; identity enmeshed with organization, 61; involuntary transitions of, 56; letting go of leadership, 63–64; management teams to succeeding, 67–68; phased retirement of, 66; preparing the way for succession, 63, 64–65; succeeding, 72–73; understanding role of, 57–59; vision and passion of, 59, 108
- Fraser, Brian, 49
- Frustration, 38–39
- G**
- Gen@, 105
- Generation X, 105, 106
- Generational diversity: developing younger leaders, 114–118; differences among generations, 103–107; diversity inventory for, 318–319; education and awareness increasing, 111–112; encouraging, 266; ensuring on board of directors, 112–113; improving effectiveness with, 108–109; redefining nonprofit executives, 120; reflection questions for, 121–122; reviewing age and tenure of board leaders, 94; steps toward, 118–120
- Generations* (Brinckerhoff), 103–105, 112, 118
- GenY, 105
- Gilmore, Tom, 153
- Goals: leader, 223–225; succession planning, 174
- Goleman, Daniel, 42
- Good to Great* (Collins), 228
- Governing boards. *See* Board of directors
- Grantmakers for Effective Organizations, 228
- Grantmakers in Health, 85–86
- Greatest Generation, 104

- Greene, Bob, 84, 100
 Grieving, 37–38, 44–45
 Group emoting, 41–42
- H**
- Hard-to-Follow Executive transitions: about, 127, 129, 133–134; Pivot phase examples in, 157–158; Prepare phase examples in, 148–149; Thrive phase examples in, 166
 Heraclitus, 172
 Hero leaders, 13, 116, 117
 High performers, 242, 243, 252, 254
 High potentials, 238, 242, 243, 252, 254
 High producers, 238
 Hinden, Denice Rothman, 134
 Hiring: candidates, 153, 154–155; interim executives, 281–283, 284; leaders, 131–132; preparing plan for, 145–146; using sustainability plans, 210
 Hirschorn, Larry, 26
 Holder, Eric, 89–90
 Human Performance Institute, 49
- I**
- Immelt, Jeff, 172
 Implement phase: executive actions during, 212–214; phase in departure-defined succession planning, 196, 210; sustainability actions during, 210–212
 Inclusiveness: defined, 82; defining practices supporting, 234–235; including in annual operating plan, 101; in leaderful organizations, 77; making organizational priority, 167; in nonprofit workforce, 9; planning transitions for long-term, 96–97
 Informal leaders, 5
 “Interim Executive Directors” (Wolfred), 281, 284
 Interim executives: about, 71; benefits of, 281–283; commitment to leaderful organization, 264–265; roles of, 136–137; where to find, 284
 International Coach Federation, 226
 Interviewing candidates, 153, 154
 Inventories: attitudes about diversity, 319–320; diversity, 318–320; leader’s personal and professional, 314–316; questions about organization, 317
Investing in Leadership (Enright), 228
- J**
- Jackson, Jesse, 237
 Jones, Karen Gaskin, 222
Journal of Leadership & Organizational Studies, 14
 Joy, 39
 Jung, Carl, 116
- K**
- Kim, Helen, 106, 107
 Kouzes, J. M., 224
 Kübler-Ross, Elisabeth, 44–45
 Kunreuther, France, 106, 107
- L**
- Landmark Education, 50
 La Piana, David, 94
 Lawler, Edward, 243
 Leader development: actions advancing, 229–237; aligning human resources to, 232–237; assessing competencies and goals, 223–225; benefits of investing in, 227–229; coaching and, 67, 162, 226, 266; commitment of top leaders for, 230–231; consulting assistance in, 294; defined, 175; examples of, 219–221; executive transition management and, 70, 114–115; facilitating diversity in, 101–102; finalizing ongoing plans for, 256–257; initiating talent management system, 229, 236–237; knowing and mitigating blind spots, 227; learning opportunities for, 309–311; making priority, 217, 235–236; mentors and advocates supporting, 225–226, 266, 282; modeling behaviors in transitions, 168; personal mission statements, 223; personal strategies for, 221–222, 291; planning for, 172; putting succession plan in place, 231–232; reflection questions for, 257–258; reflective process for leaders, 222; succession planning and, 187; work groups for, 249–250, 266
 Leaderful organizations: changing incrementally to, 267; defined, 14; departure-defined succession planning in, 214–215; diversity and inclusiveness within, 77–82; examples of, 15–16, 261–262; founder’s contributions to, 62–65; how to create, 265–267; importance of transitions for, 16–17; individual paths to, 269–270; leadership development in, 17–18, 64–65, 217, 268–269; leadership sustainability planning in, 174; organizational support of,

270–271; practices supporting, 262–263; stakeholders role in, 271; support for, 263–265

Leaders: actions for, 322; attitudes about diversity, 319–320; attracting racial and ethnic, 84–103; benefits of investing in, 227–229; blind spots of, 227; boundary setting, 48–49; capacity of current, 250; championing diversity, 92–94; coaching for, 67, 162, 226, 266; competencies and goals of, 223–225; creativity and innovation of, 9; cross-training plan for, 185; cultivating emotional self-awareness, 50–51; dealing with staff emotions, 41–42; defined, 218; defining transitional pivot, 149; detachment from fear, 47–48; determining transition help needed, 141–142; developing racially diverse staff, 87–88; development strategies for, 221–222, 291; differences in generational, 106; emotions of, 32, 33–39, 42–44, 321; encouraging leaderful organizations, 263–265, 269–270; exaggerated expectations of, 13; executive transition management to develop, 166–168; generational diversity of, 10, 14, 107, 266; hero, 13, 116, 117; hiring, 131–132, 166–167; impact of emotions on, 29–32; informal, 5; initiating performance reviews, 233–234, 268–269; investing in transitions of, 1–8; learning opportunities for, 309–311; making people competitive advantage, 243–244; mentors and advocates for, 225–226, 266, 282; perceiving emotions, 42–43; personal mission statements of, 223; positional, 5; positive beginnings for, 135, 159–161; preparing new, 245–246; professional inventories for, 314–316; putting succession plan in place, 231–232; questions for individual, 26; relationships with departing, 135–136; resiliency rituals for, 49–50; self-assessments by, 222; setting diversity policies, 234–235; succeeding founders, 72–73; superkeeper, 243, 251, 252; supporting leader development, 230–231; time or money issues for, 48; training emerging, 236–237. *See also* Leaders of color; Younger leaders

Leaders at All Levels (Charan), 225, 245

Leaders of color: addressing racial disparities, 86–87; challenges in increasing, 89–92; developing nonwhite staff leaders, 87–88; emergency backups for, 98–99; leadership opportunities for, 77–82; recruiting, 91; retaining, 99–100; selecting and helping

succeed, 97–98; supporting organization's mission, 96

Leadership: age-diverse, 109–110; budget to develop, 268–269; building on mission, 175–176; challenges in nonprofit, 10–14; developing in leaderful organizations, 17–18; diversity in, 13–14, 77–82; importance of transitions in, 16–17; letting go of, 63–64; nonprofit advantages for, 8–10; programs on, 50; succession planning by founders, 62–65; sustainability planning for, 174–176

Leadership Challenge, The (Kouzes and Posner), 224

Leadership Learning Community, 225

Leadership Lost (CompassPoint Nonprofit Services), 11

“Let it begin with me” principle, 47

“Live in the day” principle, 47

Loehr, Jim, 49

Lominger International, 224, 227

Lore, Nicholas, 224–225

M

Making Leadership Change (Gilmore), 153

Managance Consulting, 133–134

Management teams, 67–68

Managers: attitudes about diversity, 319–320; emergency backups for key, 98–99; facilitating diversity, 101–102; how to use this book, 23–24; performance reviews by, 233–234, 268–269; talent development for, 245

Managing Executive Transitions (Wolfred), 293

Mayer, J. D., 42

McIntosh, Peggy, 85

McLaughlin, T. A., 58, 59

Meditation, 46

Mentors, 225–226, 266, 282

Millennials, 105, 106

Mission: achieving with staff and volunteers, 246–248; clarifying, 248–249; developing personal statement of, 223; focusing diversity on organizational, 96; reviewing, 175–176

Money problems, 48

Moss, M. K., 83

Mother Teresa, 13

Moving Beyond Founder's Syndrome to Nonprofit Success (McLaughlin and Backlund), 58

“Multi-Faceted Look at Diversity, A” (Berthoud and Greene), 84

N

NeighborWorks America, 12, 132–133, 140
 Neutral periods, 34–35
 New executives: ensuring clarity between board and, 161; hiring, 131–132, 153, 154–155, 166–167; importance of Thrive phase for, 142; initiating accountability between board and, 162–163; offering support to, 162; retaining, 140; risks during transition to, 158–159; sample entry plan for, 288–291; welcoming, 139
 Nonprofit organizations: allowing leader to let go, 63–64; bench strength and talent reviews for, 250–252, 267; choosing consultants, 295–296; continuing founder's contact with, 62, 65–66; developing younger leaders, 14, 107; entry plan for new executives, 288–291; exaggerated leader expectations in, 13; financial fears in, 36; finding consultants, 294–295; focus of questions for, 26; founder syndrome in, 56, 58, 62; generational differences and, 103–107, 119; generational diversity of service recipients, 119; impact of emotions on, 29–32; increasing diversity in, 89–92, 96, 167; incremental change in, 267; investing in leaders, 227–229, 232–237; making process decisions about transitions, 140–142; organizational reviews within, 139–140; people as competitive advantage in, 243–244; people as disposable commodities in, 12; practices supporting leaderful, 262–263; preparing for founder succession, 65–66; questions about, 317; role of founders in, 57–59; romanticizing private sector models, 13; strategic planning for, 94–95; succession planning in, 1–8, 172–173, 177–181; support of leaderful organization, 265–267, 270–271; sustainability in, 12–13; talent management for, 237–240; transitions strengthening, 7; writing succession policy, 185–186, 207–208. *See also* Founders

O

Obama, Barack, 13, 80
 Organizational Development Network, 294–295
 Organizational strengthening: clarifying future priorities, 152; difficult choices during, 151–152; in Pivot phase, 149–150; transition issues arising during, 150–151

P

Pacifica Graduate Institute, 116
 Page, Scott E., 80–81
 Passion of founders, 59, 108
Pathfinder, The (Lore), 224–225
 Peace, 39, 45
 Pearson, Carol, 116
 Peer support groups, 266
 Performance reviews, 233–234, 268–269
 Perls, Fritz, 36
 Personal mission statements, 223
 Pivot phase: about, 142, 149; examples of, 156–157; illustrated, 276; organizational strengthening in, 149–150; steps in, 278–279; transitions to generational diversity and, 113
 Plan phase: about, 208–209; for departure-defined succession planning, 196
 Planning. *See* Succession planning; Departure-defined succession planning
 Positional leaders, 5, 217
 Posner, B. Z., 224
 Prayer, 46
 Prepare phase: about, 142; board and staff alignment in, 144–145; for departure-defined succession planning, 196, 197–201; examples of, 146–149; exploring diversity considerations, 145; illustrated, 276; steps in, 142–144, 277–278; transitions to generational diversity and, 113

R

Race Matters Initiative, 81–82
 Racial and ethnic diversity: challenges increasing, 89–92; championing, 92–94; controversy over, 84–85; demographics and, 85–86, 97; diversity inventory for, 318–319; improved effectiveness with, 85–88; preparing for, 90; recruiting leaders of color, 91; reflection questions for, 121–122; strategic planning for, 94–95; transition strategies increasing, 95–102. *See also* Diversity; Leaders of color
 Rath, T., 224
Ready to Lead (CompassPoint Nonprofit Services), 10, 11, 13, 106, 114
 Redington, E., 63
 Relationships: with departing executives, 135–136; in founder transitions, 72–73; new executive's building of, 158–159
 Religious practices, 45–46

- Replacement planning, 172
- Reputation fear, 36–37
- Resiliency rituals, 49–50
- Retaining: employees, 87–88; leaders of color, 99–100; new executives, 140
- Review phase: completing basic succession planning in, 207–208; organizational review in, 203; overview of, 201–203; phase in departure-defined succession planning, 196; sustainability audits in, 206–207; sustainability review in, 203–206
- Reviews: annual emergency backup plan, 182, 185; bench strength, 236, 250–255, 267; board leader age and tenure, 94; initiating performance, 233–234, 268–269; leader's personal and professional inventories, 314–316; between new executive and directors, 162–163; organizational, 139–140, 143–144; sustainability, 69, 187, 203–206, 209–210; talent, 250–252, 267; types of organizational, 203
- Rockport Institute, 225
- Rodriguez, Robby, 106, 107, 114
- Rosenberg, S., 60
- Rouson, B., 83, 222
- ## S
- Sadness and withdrawal, 37–38
- Salaries: compensating younger leaders, 120; during executive sabbaticals, 68; frustration at low, 30–31; interim executives, 283; leadership, 11–12, 30–31, 120; recruiting leaders of color and, 91
- Salovey, P., 42
- Search committees: broadening social networks, 97, 153; clarifying candidates' characteristics, 153–154; cultivating and educating members of, 167; focusing both on transition and search, 141; hiring candidates, 153, 154–155, 166–167; importance of Pivot phase for, 142, 149; making offer to candidates, 155–156; preparing position profile and search plan, 145–146; retaining new executives, 140; selecting, 137–138; social networking time needed, 154; steps for, 152–153; using demographics during searches, 97
- Seeing the Future with 20/20 Vision* (Grantmakers in Health), 85–86
- Seibert, Al, 49
- Self-care, 32
- Seven Habits of Highly Effective People, The* (Covey), 223
- Silent Generation, 104
- Social contracts, 161
- Social networking: broadening, 97, 153; racial and ethnic diversity and, 91; time needed by search committees, 154
- Spiritual practices, 45–46
- Srivastva, Suresh, 40
- St. Onge, Patricia, 83–84
- Staff: aligning, 144–145, 201; attitudes about diversity, 319–320; clarifying mission-strategy-people connection, 248–249; as competitive advantage, 243–244; determining for emergency backups, 183–184; emotions of, 41–42; fear of failure, 36–37; involving in search committees, 138–139; racial diversity of, 87–88; salaries of, 30–31; shaping priorities for new executives, 139–140; talent management for, 236–237, 245, 246; treating as disposable commodities, 12. *See also* Employees; Volunteers
- Stakeholders: how to use this book, 25; involving in search committees, 138–139; reflective questions for, 26; role in leaderful organizations, 271; shaping priorities for new executives, 139–140
- Status, 37
- Stevens, Sue, 60
- Strategic planning: finalizing leader development and talent management plans, 256–257; focusing on leadership, 144–145, 235–236; for founder succession, 67; for racial and ethnic diversity, 94–95
- Strengths Finder 2.0* (Rath), 224
- Succeeding founders: board-planned successions, 67; board support for new executives, 73; departure-defined succession planning, 69–70; developing leaders for, 70; ensuring successful transitions when, 74–75; founder's preparations, 63, 64–65; management teams for, 67–68; reflection questions on, 74–75. *See also* Leaders of color
- Succession planning: benefits of departure-defined, 194–195; coaching supporting, 67, 162, 226, 266; completing plan, 177–178, 231–232, 265; components of succession plans, 187; consultant help in, 293–294; defined, 17, 173; departure-defined, 69–70; developing succession policy, 185–186, 207–208; developing younger leaders,

- 114–118; factors in successful departure-defined, 192–194; founder's ambivalence to, 61–62, 133; generational differences and, 113–114; leader development and talent management for, 70, 101–102; for leaders, 1–8; letting go of leaders, 62–65; management teams for, 67–68; need for, 171–172; preparing the way for, 63, 64–65; questions for sustainability audit, 305–308; reducing anxiety during, 175–177; reflection questions for, 188, 215–216; risks and benefits of, 178–181; sabbaticals and, 68; sample sustainability audit, 297–304; steps in, 174; terms for, 174–175; time required for, 173; tips for leaders succeeding founders, 72–73; types of, 172. *See also* Departure-defined succession planning; Emergency backup plan
- Succession policy: completing, 177–178, 231–232, 265; as component of succession plan, 187; developing with consultants, 293–294; writing, 185–186, 207–208
- Superkeepers, 243, 251, 252
- Support Center of New York, 284, 294
- Surrender, 47
- Sustainability audits: developing, 69, 206–207; example of, 297–304; questions for, 305–308
- Sustainability reviews: about, 69; as component of succession plan, 187; creating, 203–206; outcome of, 209–210
- Sustainability strategy sessions, 208–210
- Sustained Success transitions: about, 127, 128; examples of Prepare phase in, 146; Pivot phase examples for, 156; Thrive phase examples for, 164
- T**
- Talent, 218
- Talent management: assessing current leader capacity, 250; balancing focus of, 245; bench strength and talent review process, 250–252, 267; clarifying mission-strategy-people connection, 248–249; comparative matrix for, 312–313; as component of succession plan, 187; consulting assistance in, 294; defined, 174, 175, 218; empowering work groups for, 249–250, 266; examples of, 219–221, 240–243; facilitating diversity in, 101–102; finalizing ongoing plans for, 256–257; generational diversity in, 114–118; importance in succession planning, 70; initiating, 229, 236–237; launching program for, 248–252, 254–257; making people competitive advantage, 243–244; questions for focusing, 244; reflection questions for, 258–259; relevance of, 237–240; report format for, 254; training emerging leaders and staff, 236–237; volunteers and, 246
- Talent Management Handbook* (Berger), 116–117, 251, 257
- Tebbe, Don, 127, 128–129, 133, 137, 152–153, 285–287, 288–291
- Teegarden, Paige Hill, 134
- Third Sector New England, 294
- Thrive phase: about, 142; examples of transitions in, 164–166; illustrated, 276; steps in, 279–280; transitions to generational diversity and, 113
- Time-debting, 48
- Time requirements: budgeting for leadership development, 268–269; for social networking, 154; for succession planning, 173
- Timelines: for new executives, 288–291; transition, 285–287
- Transition committees, 150, 151–152. *See also* Search committees
- TransitionGuides, 91, 133–134, 140, 196, 276, 285–287, 295, 297–304, 305, 309–322
- Transitions: announcing, 143; board planning for founder, 67; change vs., 135; determining help leaders need for, 141–142; developing leaders during, 166–168; diversity strategies for, 95–102; emotions about, 33–35, 46–49, 61–62, 133, 135; ensuring successful founder, 74–75; executive coaching for, 67, 162; facilitating positive beginnings, 135, 159–161; focusing on search and, 141; frustration and anger during, 38–39; grieving and, 37–38, 44–45; hiring consultants for, 293; involuntary founder, 56; key decisions in, 134–136; managing executive, 70–71; modeling leader development in, 168; opportunities in, 16–17; phases in, 34; planning for inclusiveness with, 96–97; process decisions about, 140–142; retaining new executives, 140; risks during, 158–159; sample timeline for, 285–287; selecting search committees for, 137–138; successful, 132–134; types of, 127, 128–129. *See also* Pivot phase; Prepare phase; Thrive phase
- Tropman Report*, 112

Turnaround transitions: about, 127, 129; examples of, 130–131; founder-like qualities of executives in, 59; involuntary transitions and, 56; Pivot phase examples for, 157; Prepare phase examples for, 147; Thrive phase examples for, 165

Twelve Step wisdom, 46–49

U

Underperforming Organization transitions: example of, 130; executive transitions for, 127, 129; Pivot phase examples for, 156–157; Prepare phase examples for, 146–147; Thrive phase examples for, 164–165

Up Next (Kim and Kunreuther), 106

Urban Institute, 14

U.S. Census Bureau, 85

V

Vergara-Lobo, A., 83

Vickers, D., 63

Vision of founders, 59

Volunteers: generational diversity in, 118; as part of talent system, 246

W

“We the Leaders”, 14

Welch, Jack, 172

Welcoming new executives, 139

“White Privilege” (McIntosh), 85

W.K. Kellogg Foundation, 125, 132

Wolfréd, T., 281, 293

Work groups, 249–250, 266

Workforce Diversity and Inclusion Compact (Nonprofit Workforce Coalition), 111

Working Across Generations (Kim, Kunreuther, and Rodriquez), 106, 114

Y

Younger leaders: attracting and developing, 110–111; factors deterrents to age-diverse leadership, 109–110; redefining nonprofit executives for, 120; salaries for, 120. *See also* Generational diversity