

# Leadership Transition: Is it Worth the Leap?

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# Understand Why You Want to Make a Change

**Remember change is hard -  
even if it's for the better**

## Ask Yourself:

- ▶ Am I unhappy in my position on a consistent basis or is it just situational - 80/20 Rule?
- ▶ Am I still aligning with my nonprofit's mission?
- ▶ Is it time to live in a different location?

## Ask Yourself:

- ▶ Do I need or want to make more money?
- ▶ Do I want to a slower pace or a job with more challenges?
- ▶ Do I feel underappreciated?  
(welcome to nonprofit)

## Ask Yourself:

- ▶ Is my dissatisfaction within myself?  
Remember wherever you go, that's where you end up
- ▶ Should I take a sabbatical?

# How to Search

- ▶ Online search engines - Indeed, LinkedIn, ZipRecruiter, etc
- ▶ Headhunters/Search Firms (Armstrong McGuire, State Non-profit sites, Work for Good, Idealist, National Council of Nonprofits, ExecuNet, The Moran Company)
- ▶ Networking (BRI)
- ▶ Decide where you want to be and take the initiative to make contact
- ▶ Get professional help with your resume - especially if it's been a while since you updated it
- ▶ Prepare yourself for a more intensive interview process

## Before Accepting the Position:

- ▶ Review organization's Guidestar profile - especially 990's
- ▶ Check out the salary of key positions on the 990
- ▶ Review the organization's social media pages and website.

## Before Accepting the Position:

- ▶ Request the following - personnel policies, bylaws, operating procedures, accounting policies, latest financial statement, and recent board minutes
- ▶ Board members can often times be unaware of a financial mess - Review at least two prior year audit reports
- ▶ Inquire about funding mandates



## Before Accepting the Position:

- ▶ Do social media and LinkedIn searches on employees and board members (because they will be doing it on you)
- ▶ Try to ascertain if an internal staff member applied for your position. This can make for some dicey dynamics and you will want to be prepared.

# Be sure and negotiate an employment contract which should include:

- ▶ Compensation
- ▶ Duties
- ▶ Benefits
- ▶ Time off
- ▶ Moving expenses if necessary
- ▶ Professional Development needs (Blue Ridge!)
- ▶ Termination for Cause
- ▶ Severance
- ▶ Do not sign until you have a lawyer review
- ▶ Advocate for yourself!

# Once in Your New Leadership Position:

- ▶ **Do not** opt for the bull-in-a-china shop approach.
- ▶ Give yourself a little time before you change policies. Find about the history of policies first.
- ▶ Remember you will have staff that have been there longer than you and they will be adjusting to the transition in leadership with a lot of unknowns.
- ▶ Take your time and get to know each of your key staff.
- ▶ Consider conducting a DiSC assessment with key staff.

# Once in Your New Leadership Position:

- ▶ Make sure you conduct regular staff meetings.
- ▶ Work to get to know your board chair and schedule regular meetings with them. Find out what they expect from you as a leader of the organization. Providing Joan Garry's book - *Non-profit Leadership* can really help.
- ▶ Make yourself known in the community - a PR should be completed announcing you in this new position.

## Once in Your New Leadership Position:

- ▶ At the beginning, focus on asking questions rather than giving directives. LISTEN LISTEN LISTEN!
- ▶ Make sure you have a circle of support outside of your organization that understands your situation
- ▶ Be prepared - staff will leave, usually in the first two years of a transition. This is not unusual.
- ▶ Consider utilizing a professional coach - this can be worked into your employment contract.
- ▶ Give yourself time to love your new job. You will have lots of moments where you wonder if you did the right thing.