By Tom Adams, Director of Succession and Sustainability at Raffa, P.C.

Are executive transitions complex and challenging? Certainly. Anytime a group of volunteers with varying understanding of the work and direction of the organization are asked to manage the departure of the current executive, define expectations for a new executive, hire that person and get off to a positive start, there are challenges. When one manager hires one employee, the odds of a good hire are mixed. When a group of volunteers makes a hiring decision, the odds of success go down. And if some of the leaders have been part of a founder or long-tenured executive departure, there is often an expectation the transition will be difficult. It does not have to be this way.

Do executive transitions need to be full of surprises, misunderstandings and negative consequences for the organization and its work? DEFINITELY NOT.

Over the past twenty years, a field of professional consulting services has developed a body of knowledge and experience which dramatically improves the odds of a positive executive transition. The following actions by boards and executives increase the odds of a successful transition:

1) **Prepare the organization for executive transition years ahead of its occurrence. All organizations will experience executive transition at some point.**
   
   *Here are actions that help prepare the executive and the organization:*
   
   a) Conduct a sustainability and succession review to determine organizational strengths and challenges and bench strength and gaps in board and staff leadership.
   
   b) Support the executive –particularly if a founder or long-tenured executive – in learning about successful executive transitions and personally (emotionally and financially) preparing for what's next.
   
   c) Develop a written executive or transition agreement with the executive that clarifies expectations during and after transition.

2) **Pay attention to both the search and the transition.**

   Many boards get really focused on the search and finding the right person. This is logical and makes sense. Experience demonstrates that attention to the pivots or important transition issues are equally important. There are search firms who attend mostly to the search, and there are search and transition firms who attend to both. Most nonprofits are better served by attention to both transition and search.

3) **Preserve time and leadership attention for onboarding the new executive.**

   Preparing for and successfully hiring a new executive takes time, focus, and commitment from board and staff. It is human nature to pull back after the new executive is hired. How
relationships begin often contributes to how they end. Attention to the welcome and orientation, relationship building and defining clearly mutual accountability between the executive and board further enhance the odds of a productive tenure for a new executive.

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