

## MWCC Executive Transition



### Right into it

#### Advance Notice

- We had months and months initial heads-up
- Couple month notice of actual departure

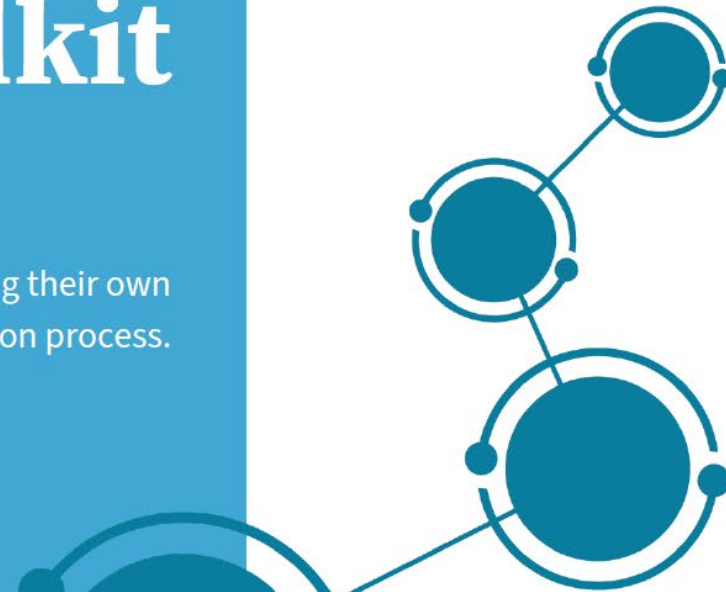
#### Team

- Immediately convened available EC, GC and others
- What needed to happen
  - Timeline
  - Hiring – position description, logistics
  - What to get from ED before departure
  - External and internal messaging. Get ahead of it
  - Intentional, thoughtful process

# Montana Nonprofit Association

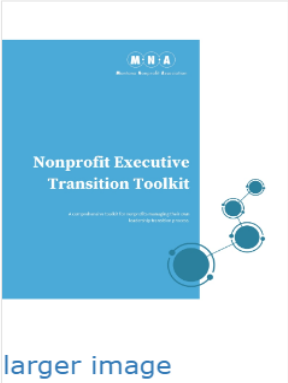

## **Nonprofit Executive Transition Toolkit**

A comprehensive toolkit for nonprofits managing their own  
leadership transition process.



https://mtnonprofit.app.neoncrm.com/np/clients/mtnonprofit/product.jsp?product=9

## Transition Toolkit



larger image

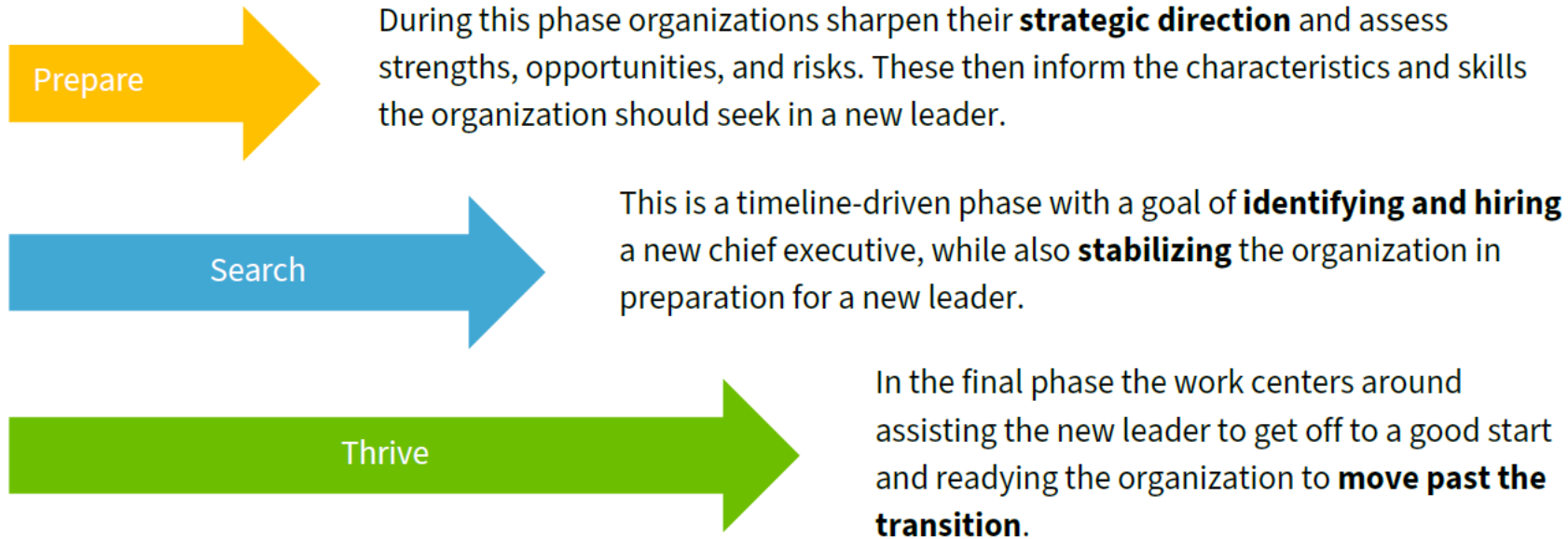
Type: Publications  
Price: \$45.00

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### Description

Facing an executive or leadership transition? Want to be prepared for one down the road? Our Transition Toolkit is finally here! And, it's free for MNA Members, thanks to a generous sponsorship from First Interstate BancSystem Foundation.



Underlying this model is a recognition that *people* are involved, not just organizations. Staff, board members, and the departing leader all care about the outcome and will have their own emotional journeys as part of the transition. A thoughtful planning process allows the people who serve your mission to move through the phases of transition, potentially even re-energizing the organization in the process.

- Key point above being "thoughtful". This is an opportunity.
- Opportunity to remind board members why they serve, what the orgs goals, vision and mission are, what it means to have a strong org.
- Don't want to dump more of a mess than necessary on new ED.
- This is a perfect opportunity for self-assessment of the org, board and staff, and for the board to work closer with non-ED staff than they have previously.
- Really is an opportunity. Take it. Time to stop everything (as much as possible) and reassess.

Question everything (without going too deep into every weed patch). There are a lot of assumptions buried in “how things are done”, some more correct than others. If you’re planning something outside the norms, great! But consider checking on the labor laws etc. associated with it...

Really a huge opportunity. For any board member willing to be more involved, it's a perfect way to get engaged and make a difference in an org. We rarely take the time to slow down and start from "why". Opportunity to re-assess strategy and direction, to decide if it's time for a different kind of leader (maybe, maybe not, but is important to consider).

Anyone involved in the transition will gain a far deeper understanding of the org, how it operates, how it interacts with its members/community than the average board member.

Can't stress the benefit of the MNA Toolkit enough. There's no need to follow it exactly; everyone's process will look different. But it turns a murky, nebulous, intimidating "where do we even start??" process into something manageable. Take what you need, then with consideration, leave the rest.