Leadership Transition:
Is Internal Leadership Development the Key?

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I dedicate this Capstone Research Report to my parents who have always believed in me.
Abstract

Most organizations in the nonprofit sector do not have a succession plan or strategy in place. Leadership succession and transitioning is often left as an afterthought. Whether that is consciously or unconsciously, it is a big mistake. This research report outlines current nonprofit sector shifts in leadership that help to create a sense of urgency for nonprofits to begin thinking about succession planning. The ultimate goal is a successful leadership transition. Organizations must be proactive about leadership change instead of waiting for a crisis to occur. It is never too early to start planning. This research uses qualitative and participatory observations to analyze two leadership transition models. The first is based on External Hiring of Leaders and the second is a model based on Internal Leadership Development. The data analysis, recommendations, and implications argue that a model based on Internal Leadership Development results in the best long-term outcomes. This report begins a longer conversation about how nonprofits can begin to cultivate, help develop, and support younger and emerging, Black, Indigenous, People of Color (BIPOC) leaders.

Keywords: Leadership, succession planning, leadership transition, internal development of leaders.
Acknowledgments

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Lastly, I would like to acknowledge the Multicultural Institute (MI), the place where I have grown professionally and personally over the last 10 years. Working in the nonprofit sector is not easy but working for this nonprofit organization has made every second count. A special thank you to Padre Rigoberto Calocarivas, MI’s Founder and current Executive Director. Thank you for taking me under your wing, for trusting me and my vision, and for coaching me all these years into a soon-to-be Executive Director. You saw the nonprofit leader in me before I did. For that I will forever be grateful.
# Table of Contents

List of Tables and Figures........................................................................................................... vii
Section 1. Introduction.................................................................................................................. 1-2
Section 2: Literature Review........................................................................................................ 2-8
Section 3: Methods and Approaches .......................................................................................... 8-11
Section 4. Data Analysis ............................................................................................................. 12-23
Section 5: Implications and Recommendations ......................................................................... 24-27
Section 6: Conclusion .................................................................................................................. 28
References..................................................................................................................................... 29-30
Author’s Bio................................................................................................................................. 31
List of Tables and Figures

Figure 1: Executive Transition Timeline.................................................................6
Figure 2: Take Stock and Take Action.................................................................7
Table 1: Considering a Leadership Transition.....................................................12
Table 2: External Hiring of New Leadership Model.............................................17
Table 3: Internal Leadership Development (ILD) Model......................................20
Figure 3: Internal Leadership Development (ILD) Model....................................24
Section 1. Introduction

In the nonprofit sector, it is common for organizations to experience staff change and constant turnover at different levels. Although all turnovers can be difficult, leadership transitions often come with the most challenges, regardless of the organizational size and capacity. This is because very few nonprofits plan ahead and create a plan for succession and transitioning of top leaders, let alone other positions in the organization. These challenges can increase or decrease depending on the organization’s current stage of the transition. Is it a founder or a long-term leader retiring from the organization? Is it a quick transition resulting from a situation gone wrong? Or is it just a transition of leadership? Whatever the case may be, when dealing with a leadership transition, an organization needs to identify the correct transition plan, dedicate the appropriate time required for it be successful, and most importantly identify and cultivate the best successor to lead. As American writer and management expert, Thomas J. Peters, so properly states, “Leaders don’t create followers; they create more leaders.”

While there are many leadership transition theories and models in the nonprofit and for-profit sectors alike, this research report further examines and analyzes two specific leadership transition models. The first model is one focused on internal leadership development and the other on external hiring of leadership. The report explores the advantages, the disadvantages, and/or the challenges of both leadership transition models, as well as the effectiveness that come with each model. Data was collected through a literature review, expert interviews, and participatory observation. The literature review helps provide an up-to-date description of what the nonprofit sector leadership demographics look like, while the expert interviews provide the point of view of current nonprofit executive directors, a Foundation director, and a leadership development trainer. Lastly, the participatory observation provides my own insight from a personal perspective on the internal leadership development model. The data concludes various themes outlining the advantages and disadvantaged to both leadership transition models.

Finally, the implications and recommendations of this research report highlight a 5 phase Internal Leadership Development Model. It will be referred to as the ILD model throughout the report. This model will cover unique opportunities that come with cultivating future leaders from within an organization and discusses the various organizational needs that one should consider in
order to follow it. Final recommendations showcase best practices to cultivate and develop leaders from within and ultimately, successfully complete a leadership transition focused on an ILD model. Overall, this research report argues that with the right plan, the appropriate time, and the tailored resources, a transition model based on internal leadership development is the key to a successful leadership transition.

Section 2: Literature Review

Sector Shift in Leadership Demographics
In order to make an argument towards the best leadership transition model one must first understand the present leadership demographics. In current times the nonprofit sector has witnessed a shift in leader demographics with most of the founding and long-term leaders who began their careers in the 1960s and 70s departing their positions (Kunreuther, et al., 2013). This means there is and will be more vacancies in the top leadership levels. According to Kunreuther and Corvington, in collaboration with the Anne E. Casey Foundation (2007), study after study show that there is an ongoing leadership crisis with roughly 75% of executive directors/CEOs planning to leave their jobs within the next 5 years and 10 years. “As Baby Boomers leave, the sector will approach an important turning point ripe with both challenges and opportunities that will ultimately lead to a different type of sector, with a new kind of leadership in the decades to come” (Kunreuther and Corvington, 2007, p.1-5). The implications of this turnover to come will lead to drastic results as a rough estimate, of half-million executives leaving their positions in the next 15 years after having founded the organizations or been there for decades (Kunreuther, et al., 2013).

One of the main challenges that comes with this sector shift in leadership is the gap created between those that are exiting their nonprofit executive roles and the new talent available to replace them (Kunreuther, 2005). This supports the fact that with leaders leaving their leadership positions there is also a growing need to foster and prepare a new generation of leaders in the nonprofit sector. This new shift in leadership comes with an increased interest to identify new emerging leaders in the nonprofit sector. A study done by the Anne E. Casey Foundation resulted in recommendations on leadership transition and closing the leadership gap
by investing in younger leaders and cultivating Black, indigenous, people of color (BIPOC) leaders (Kunreuther, 2005). Preparing new leaders can make it viable for founders and long-term leaders to leave.

**Lack of Diversity at the Top**

The leadership pipeline gap continues to grow as you get to the top. Daring to Lead, a national study indicated that the majority of Executive Directors, representing 80% of participants were white (2006). Additionally, in terms of individuals in leadership positions, the average age of leaders was 50 years old and 75% were white (Bell, et. al, 2006). In a 2017 report titled Leading with Intent, Board Source shares similar results from a national survey where 89% of respondents identified as white. With over a decade of surveys constantly resulting in less than 20% of nonprofit executive leaders identifying as people of color (Board Source, 2017). Similarly, the Center for Effective Philanthropy (CEP), conducted a survey with 15,000 executive director respondents from their database. It was concluded that a large amount of 75% identified as white executive directors and almost 60% identified as female (Buteau, 2019). They went a bit further and also concluded that there was a trend between the size of organizational budgets and the demographics of the executive director. The larger the organizational budget the whiter male leaders they found in executive director positions (Buteau, 2019).

In addition to this racial gap we see a new generation of leaders rising. Not only can there be a difference in leadership styles, but there is also a difference in the reasons why these leaders join the nonprofit sector. According to Hannum et. al, past research in the report Emerging Leaders, shows that “younger people (regardless of generation) are more likely to change jobs than are older people.” Another trend from Hannum, K.M. et. al (2011) describes that:

Baby Boomers run the organizations, and Millennials are the new hires who are making a lot of noise. Gen Xers have to make sure the work gets done, while managing the conflicts between the people at the top (primarily Baby Boomers) who know how they want things done. The new hires (primarily Millennials) think they know how things should be done and are frustrated that they can’t get the organizations to shift to do work in the way they think would be most effective. (Hannum, K.M. et. al, 2011, P.16)
Thus, hand in hand is the point of views about the sector and mission work may be different. Through a novel titled *Generation X* by Douglas Coupland (1991), he begins a larger conversation about generational differences. He claims that:

GenXers were characterized as “slackers”; materialistic, independent, technologically savvy; serious about work but resistant to micromanagement, distrustful of government and transitional institution; without loyalty to employers (and thus likely to job hop); and interested working to live (not living to work), while expecting a high standard living (Kunreuther, 2005, p.6).

New generations can spearhead changes in the way work is done. Nevertheless, there is truth in the fact that there is a shift occurring in philanthropy in which foundations and funders are noticing the smaller organizations that give the younger, diverse, and emerging leaders opportunities to lead younger organizations and institutions. Through his philanthropic community foundation experience, Mauricio Palma, shares that:

So, as we shift our view, from the focus that we’ve had before, and you pay attention to what’s going on, on the periphery, with smaller organizations making less than a million dollar on a yearly basis, which, by the way, represent the majority of the organizations in our community, I did a brief assessment, and looking at what was going on 10 years ago…. And now….as we're paying attention to this organization, you see younger leaders like yourself, stepping up, providing support to institutions that are either emerging institutions, or transitioning institution, which is interesting, because now the younger leaders are also part of younger institutions. And younger institutions, meaning that they haven't been there for 30 years, they're not celebrating the 50th anniversary….We're talking about emerging organizations that are maybe three years old, all the way up to five years old, are within that category. And [we’re] also paying attention to organizations that are led by people of color with greater intentionality (M. Palma. Expert Interview 2, April 8, 2021).

This shift in focus is important to put into context when thinking about who the leaders are that the current nonprofit sector is hiring externally and internally to lead organizations.
Succession Planning before a Leadership Transition

This leads to the topic of succession planning and leadership transition. A smooth transition and successful departure of a leader is a result only when there is a well thought out plan. When considering the transition of a leader, organizations often jump into transitions without having any type of succession planning in place. In this report, I argue that having a succession plan is extremely crucial in the beginning stages. According to the definition of the Chartered Institute of Personnel and Development (CIPD), “Succession planning is the process of identifying and developing potential future leaders or senior managers, as well as individuals to fill other business-critical positions, either in the short- or the long-term” (2020).

The current shift in leadership demographics make succession planning that much more important for organizations to consider early on. Succession planning can help develop leaders at all levels. Organizations can focus their succession plan on either specific positions or individual staff members. However, the Board of Directors and the staff alike must be in favor of this succession plan. Tom Adams in The Nonprofit Leadership Transition and Development Guide, argues that, “To broaden support (or build it if nonexistent), the board should discuss both the risks of failing to plan and the benefits of planning” (Adams, 2010, p.178). Adams names three main risks of not planning ahead, (1) sudden or an unprepared departure of a leader, (2) not finding the best new Executive Director to lead, and (3) an organization becoming stale and out of touch because a leader does not transition out (Adams, 2010, p.179). He continues to argue that to be successful an organization must, “make annual, ongoing investments in growing new leaders, managers, and bench strength.” (Adams, 2010, p.179). Ultimately, immediate benefits can be new talent and energy, sustainable leadership roles, and greater retention and internal advancement, resulting in a sustainable organization (Adams, 2010, p.180-181). Thus, succession planning must be in place before a leadership transition can begin.

Leadership Transition Models

The leadership transition that an organization embarks in will vary due to the reason for the transition. In his book, Chief Executive Transitions: How to Hire and Support a Nonprofit CEO (2008), Dan Tebbe identifies five classic types of transitions:

- Type 1- Sustained Success:
Organization is well led and is performing well or exemplary.

- **Type 2- Underperforming Organization**
  Organization is performing poorly, or work has gone stale.

- **Type 3- Turnaround**
  Organization went through a mismanagement or a scandal.

- **Type 4- First Hire**
  Organization is a start-up or is shifting from volunteer based to hiring an Executive Director for the first time.

- **Type 5- Hard-to-Follow Executive**
  Organization is facing the departure of a founder or long-term leader (7 or more years).

These types of transitions show that sometimes the departure of a leader can be drastic or a continuation of succession.

Knowing the type and reason for the transition will help the organization engage in the best transition model possible. Then the timeframe for the transition will vary on the organization and its goals. Most leadership transition timelines include main steps often explained as: (1) Succession Planning, (2) Preparation, (3) Searching and Pivoting, and (4) Thriving and Support (Board Source, 2009). Figure 1 is an example of an executive transition timeline supported by Board Source.

**Figure 1: Executive Transition Timeline**

Source: *Chief Executive Succession Planning, Chief Executive Transitions, Board Source 2009*
Here you will see that succession planning is identified as a fundamental first step. These styles of timelines are usually focused on external hiring as the main step in completing its leadership transition.

**Preparing for a Transition**

According to Keller and Meaney, “Studies show that two years after executive transitions, anywhere between 27 and 46 percent of them are regarded as failures or disappointments (Keller and Meaney, 2018). This proves that preparing for a transition is just as important as executing the transition. In their article titled “Successfully Transitions to New Leadership Roles”, Keller and Meaney, make a case for organizations to consider two important steps of preparing for leadership transition, “taking stock and taking action” (2018). They suggest paying attention and recognizing how important it is for leaders to first gauge performance, culture, relationships, and capacities of an organization before taking action to change or enhance what is in place. Consequently, the article makes the case that there is five dimensions of leadership that a leader must consider: the strategy and operation of the business or function, the culture, the team, the leader, and other stakeholders that need to be managed. Figure 2: Take Stock and Take Action, below, illustrates their recommendation.

**Figure 2: Take Stock and Take Action**

Leaders should think about mounting a transition in two equal steps: first take stock, then take action across five dimensions.

**Source:** McKinsey & Company, Keller and Meaney, 2018
What else should one be paying attention to during this phase of planning a transition? Tom Adams makes the argument that, “There are three interconnected keys to this phase: executive readiness, board readiness, and executive-board-staff alignment about the process” (Adams, 2010, p.197). Executive readiness refers to the amount of work the executive has done in favor of transition out. Board readiness centers around the question on how much and whether or not the board is ready for the departure and change of leadership. Finally, the last key of this phase includes the executive, board and staff alignment. This includes being transparent about the purpose of the transition and the values that the Board of Directors wants to continue even after the transition.

**Research Questions**

The literature review led to the main question of how a Leadership Transition Model focused on internal leadership development compared to other transition models. The research questions guiding this Capstone report include:

1. What are the advantages and disadvantages to developing and hiring internal talent for leadership positions?
2. What are the advantages and disadvantages that come from hiring and onboarding leaders externally?
3. How do they compare? What is the ideal model to follow?

**Section 3: Methods and Approaches**

This research report uses qualitative data from semi-structured interviews and my own personal participatory observation. Semi-structured interviews were conducted with four experts: two were current nonprofit executive directors, the third was a foundation director, and the fourth was a leadership development trainer. Together they brought over 130 years of leadership experience to this research. This experience includes all years in which they carried out leadership positions supervising and managing programs, initiatives, and nonprofit organizations. With my own input to the qualitative data, I add an additional 10 years of nonprofit experience and seven years of leadership expertise.
Expert Interviews
Experts interviewed include professionals in different positions that were directly connected to or involved in the leadership transitions. All interviewees were Latina women and Latino men that I am somehow connected to through my employer, the Multicultural Institute (MI) or through my academic journey at University of San Francisco. Interviews conducted were semi-structured meaning that they started off with general questions that shifted or changed due to each interviewee. By the end, each interview was tailored to the experience of the expert. The general questions included the following:

1. How many years of experience do you have in leadership positions?
   a. Can you please describe your current leadership position?
   b. Were you externally hired or internally developed for the position?
2. What is your experience with the leadership transition processes?
   a. Can you please describe that experience?
3. What are the advantages that come from hiring and onboarding leaders externally?
   a. What disadvantages/challenges come from hiring and onboarding leaders externally?
4. What advantages come with internally developing leaders?
   a. What disadvantages/challenges can surface from developing leaders internally?

Three of the four interviews were conducted via Zoom with only one conducted and completed in person. Each interview took from 45 minutes to an hour to complete. Notes and voice transcripts were used to report back and analyze the findings. All interviews were coded and analyzed to gather the most information possible to answer the main research questions.

The four interviewees included the following nonprofit experts: Rigoberto Calocarivas, PhD and the Founder and Executive Director of the Multicultural Institute (MI). The interview with Rigoberto Calocarivas was unique to this report because he is the leader who instrumented and planned the transition plan that I am currently a part of. He is referred to as Expert Interview 1. The second interviewee was Mauricio Palma, the Director of Initiatives and Special Projects, of a well-known donor-advised, community foundation in the Santa Clara County. He is referred
to as Expert Interview 2. The third was Dr. Sonia Manjon, PhD, the Executive Director of a leadership development center that helps strengthen leaders and organizations in the Bay Area. I would like to point out that during the transcription and analyzing of the video recording there was an issue with the Zoom recording, and it was different to hear what information was shared. Dr. Manjon’s quotes and general advice was primarily gathered through physical notes taken by me. She is referred to Expert Interview 3. Lastly, V.V. who will remain anonymous throughout the report, is an Executive Director from a health and human services organization. She is referred to Expert Interview 4.

Participatory Observation

In 2010, I began my professional nonprofit work at the Multicultural Institute (MI). Working with MI has provided me with many professional development opportunities. Through the years, I obtained two different director positions across two MI programs. When the opportunity came up, I was offered the Associate Director position. As Associate Director for over five years, I was fortunate to receive ongoing mentorship and was developed into a grant writer, development director, program supervisor, and an institutional leader. At the same time that I was promoted to the Associate Director position, MI’s ED and Founder, Rigoberto Calocarivas, developed his succession plan.

Having a succession plan is rare in the nonprofit sector, so for him to develop and update MI’s succession plan was an important step in the right direction. It has been an honor to be a young Latina woman in a leadership position of this magnitude. I have experienced two years of transition, professional development, and growth. Through this report I am a co-expert. My own experience proves that a transition model based on internal leadership development results in a successful and fruitful transition. I was able to partake in the planning process, preparation and brainstorming phase, and currently in implementation of MI’s leadership transition.

Through this process, I have learned what I consider best practices for emerging leaders developing their skills. I have been fortunate to be fully emersed in the leadership transition at MI. For the past five years, I have experienced and been part of the quarterly Board of Director meetings, I have supervised programs, and program directors, and just as importantly I have represented MI institutionally in City, County, and stakeholder meetings. Some of the other best
practices of the last two years which have been a crucial part of the transition plan include, delegation of Executive Director duties, opportunities to represent MI institutionally by partaking in interviews, news articles, and hosting events on MI’s behalf. This transition encouraged me to embark in my journey at the University of San Francisco to pursue my Master of Nonprofit Administration degree after graduating with my Bachelor’s Degree in Sociology from the University of California Berkeley six years prior.

**Ethics and Possible Biases**

When I speak about my own participatory observations, I am referring to my experience that I have gained through MI’s current transition plan. I acknowledge that there are some limitations with my observations that include my own biases and point of views towards how successful this transition has gone for me. I also want to point out that I am currently experiencing the last six weeks of this transition model which means that there can still be some lessons and best practices learned until then. When it came to interviewees, sampling was not random as I specifically reached out to individuals that I know, that I have some sort of connection with, and that I am aware of that have been in some sort of leadership transition. They are considered a convenient sampling group. I am also acknowledging that I had a recording issue with Dr. Sonia Manjon’s interview Zoom recording which limited my references to her expertise and comments to findings analyzed through my notes only.

**Research Aspirations and Future Benefits**

This research aspires to be a template and boiler point model that can be easily followed and used by other nonprofit organizations. Specifically, nonprofit organizations with budgets ranging from $500,000 to a 1-million-dollars can benefit from this research. This report provides recommendations on the development of internal talent that can also help create career ladders within organizations. Hopefully, this work will inspire organizations (regardless of size and capacity) to invest time and energy in developing leaders from within. Finally, this report aspires to make a case for organizations to identify emerging leaders and Black, Indigenous, and People of Color (BIPOC) leaders through the use of this model. This report is also a starting point for future articles and reports on this model.
Section 4. Data Analysis

Before the data gathered could be analyzed in support of or against a leadership transition, it was important for me to first understand what each expert thought about leadership and transitions in general and how it related to the literature. To better understand and compare the three data sources: literature, expert interviews, and my own participate observations, a compare and contrast analysis was completed. Three main areas were identified to divide findings and recommendations for this section: Considering a Leadership Transition, External Hiring of New Leadership, and Internal Leadership Development.

Considering a Leadership Transition

Table 1: Considering a Leadership Transition, is shown below. It was created to facilitate a clear overview of the main themes found throughout my analysis on leadership in general. It was not a surprise to find that the experts interviewed saw leadership as a vocation and act of working with others for a similar mission and passion. M. Palma summarizes this opinion by saying, “Leadership is beyond the title. Leadership is taking advantage of those opportunities to make the case on behalf of the work that you believe is critical” (M. Palma. Expert Interview 2, April 8, 2021).

Table 1: Considering a Leadership Transition

<table>
<thead>
<tr>
<th>What is leadership?</th>
<th>Literature</th>
<th>Interview Experts</th>
<th>Participatory Observation</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ A function not a person.</td>
<td>▪ True vocation and passion.</td>
<td>▪ Mentoring and working with others.</td>
<td></td>
</tr>
<tr>
<td>▪ Set of learnable skills.</td>
<td>▪ More than a title.</td>
<td>▪ Collaboratively guiding a mission, passion, or purpose forward.</td>
<td></td>
</tr>
<tr>
<td>▪ Diversity and inclusivity.</td>
<td>▪ Advocating for others.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Versatile way of leading others.</td>
<td>▪ Working with others to accomplish a mutual goal.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ “Good will is not enough.” - R.C.</td>
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</tr>
</tbody>
</table>
| Model to Follow | Chief Executive Timelines.  
|                | “A planned out and evaluated strategy should be in place before any transitioning.” - K.S., M.M  
|                | “One-size fits all” approach is not effective.  
|                | Unique and tailored model that best fits the organization.  
|                | Inclusive process including the staff, BOD, and external stakeholders.  
|                | Internal development of key leadership.  
|                | Cultivation and promotion of young and BIPOC leaders.  
|                | Internal leadership development model based on identifying, developing, and cultivating current organizational leaders.  
| What to Consider in the Process | Transition timelines are usually focused on external hiring as the main step. - B.S.  
|                | Examine the leaders available in the org at the time of transition.  
|                | Have a communications plan and BOD support.  
|                | Include the community served by the organization as much as possible.  
|                | Funding support available.  
|                | Issue of Equity and Equality.  
|                | Board of Directors role.  
|                | Processes in place at the organization.  
|                | Capacity building strategies for all staff members.  
|                | Ongoing cultivation of leaders during and after the transition.  
|                | Funding support for leaders and existing staff.  
| Recommendations | “Take stock and take action” – K.S., M.M.  
|                | “Brainstorming of the future of the organization moving forward with new leadership” – L.W., L.L.  
|                | Offer Executive Coaching before, during, and after.  
|                | Have finances in a good place before transitioning.  
|                | Invest in leadership long term.  
|                | Humanize leadership.  
|                | Mentoring/coaching opportunities for leaders.  
|                | Go back to past funders for financial support.  
|                | Do not expect new leaders to follow the same processes in place.  
|                | Inclusivity and transparency.  
|                | Invest internally in leadership development.  
|                | Create and follow a clear purpose for transition.  
|                | 3 plus year transition plan.  
|                | Transition Planning Committee.  
|                | Paid educational, skill training, and coaching opportunities for leaders.  
|                | Cultivation and incentives to stay through the transition.  

**Inclusive Model**

When asked in general terms about what model is best to follow, all sources advocated for inclusive models regardless of whether they were external or internal development models. Inclusive models were described as including and keeping the current staff, Board of Directors, external stakeholders, and also the community served in mind while making decisions. How transparent is the process? Do the Board of Directors and staff team feel comfortable with the change that is about to happen? In many ways inclusivity comes hand in hand with transparency. Having a well-thought-out plan allows for both inclusivity and transparency.

Tom Adams states, “...the simplest way to align board, executive, and staff is to talk about what each values about the work of the organization and the importance of sustaining those values” (Adams, 2010, p. 201). In my personal experience with MI, the transition including the Board of Directors along with the staff team was part of this inclusive model. We were not only notified but also integrated into each of the transition steps and decisions. Rigoberto Calocarivas shared in his interview that his hope was to:

Create and follow an all-inclusive model, that brings staff, the board, and key staff that are part of the transition always on board. The whole idea of [you] participating in the board meetings was precisely so that you would know what happens first. And you have had that experience as well. (R. Calocarivas, Expert Interview 1, April 5, 2021).

I was able to participate in these conversations and became part of spaces that I didn’t necessarily need to be as Associate Director but eventually would be as Executive Director. This was crucial to my transitioning into this new role.

**Mentoring and Coaching**

A common theme that appeared as a common recommendation in Table 1 was that of coaching and mentorship for a leader before, during, and after the transition. Dr. Sonia Manjon confirms that, “Many emerging leaders do not have mentors and they have to learn as they go, so offering mentoring opportunities is important.” (S. Manjon. Expert Interview 3, April 10, 2021). I agree and support this statement, as someone that has been mentored and coached for years. I was given the opportunities to learn side by side with the Executive Director which is a rare shadowing and learning opportunity. I am now currently benefiting from Executive Coaching as
part of the last phase of MI’s transition process. R. Calocarivas advocated for the notion of transferring of knowledge and tools acquired as a key part of transferring leadership opportunities and skills. He states, “I found ways to transfer my own responsibilities, the knowledge that I had, the tools that I have acquired, the connections that I have, and share my values and expectations to the [you] and the staff.” He ends the topic on coaching by saying that “One has to be intentional about creating opportunities, and coach individuals that have the potential to really grow in terms of a leadership role.” (R. Calocarivas, Expert Interview 1, April 5, 2021). This of course does not happen overnight. As he explained, this has been a coaching practice of his for many years.

**Funding**

Interviewee V.V in her interview stated, “A leadership transition is not effective if all the pieces are not in place and working together before, during, and after the transition” (V.V, Expert Interview 4, April 23, 2021). This includes funding. Funding was an important area of consideration identified in both the literature and in the interviews. It is obvious that one cannot plan a transition without keeping in mind the finances. Are the financials in the best place possible? And most importantly, is there funding available for the transition to occur? Organizations often see staff development and leadership transitions as one of their last needs on the list. This is especially true when there are financial hard times, when budgets are cut, or when new funding sources are not coming in. However, there are creative ideas about how to expand available funds. Some organizations set aside funds specifically for this activity. Most host events to raise the funds needed, and others ask for sponsors or support from specific donors, foundations, or important stakeholders involved (Adams, 2010, p. 268).

As part of a philanthropic foundation, Palma made an important argument about funding support, “A lot of times, organizations don’t go back to foundations that have supported them in the past. If foundations consider the earlier investments as critical for the future of the institutions, then there are ways for funding support” (M. Palma, Expert Interview 2, April 8, 2021). This is especially true for organizations that are not used to asking for capacity building, operating, and/or staff support. But how meaningful would it be to go back to past funders and receive support for something so critical as a transition? In MI’s case, Palma and the foundation
he represents were the first to intentionally and directly support the different phases of its leadership transition.

Like many other organizations, MI did not consider asking for help in the years that this process was in place. Leadership development and capacity building were mainly subsidized through unrestricted funds. Slowly, more foundations and funders are realizing that staff and leadership development is important and show more interest in helping nonprofits better define existing and new capacity building efforts. In his interview, M. Palma shared that MI became the model used to help develop a capacity building pilot with five other organizations that are going through the exact same leadership transition process as MI (M. Palma, Expert Interview 2, April 8, 2021).

Other Recommendations

Other important recommendations are listed in Table 1 including the importance for brainstorming for the future and envisioning how the organization can strengthen and evolve. There was also the idea and conclusion that the “one-size-fits-all” approach to development is not effective. Bonner and Obergas explain in their Nonprofit Leadership Development report that after various interviews and sharing of development experiences, it became evident that pure differences in people make it so that unique and tailored developmental experiences need to be created and offered. These differences can include their personality, learning styles, experience and their backgrounds (N.D., p.21). Apart from these differences related to people come the differences related to the organization itself that make it difficult for an “one-size-fits-all” approach to work for all.

External Hiring of New Leadership

As mentioned before, this report explores the advantages and disadvantages to both an external hiring of leadership and an internal development of leadership model. Opinions vary and so does the literature. Overall, an organization’s choice to externally hire new leadership also has its own advantages and disadvantages. Table 2: External Hiring of New Leadership Model, summarizes some of the main arguments, listed as advantages and disadvantages, to externally hiring new leadership. In general, I found more literature outlining, following, and advocating
for an external hiring of leadership model than I did a model on internal leadership development. My interviews were split in opinion. A noteworthy quote from Calocarivas on this topic, reads, “External hiring process works but not for key leadership” (R. Calocarivas, Expert Interview 1, April 5, 2021).

### Table 2: External Hiring of New Leadership Model

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Expert Interviews</th>
<th>Participatory Observation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Can be a DEI opportunity for the organization.</td>
<td>• Diversified knowledge</td>
<td>• New talent for the staff team.</td>
</tr>
<tr>
<td>• Can bring visibility to the organization.</td>
<td>• Creative and different ideas/solutions.</td>
<td>• New energy and outside perspective.</td>
</tr>
<tr>
<td>• Way to strengthen the organization.</td>
<td>• Fresh perspective.</td>
<td>• Shift the organization and culture in a better direction.</td>
</tr>
<tr>
<td>Disadvantages</td>
<td>• Fill current voids in the organization.</td>
<td>• Can modernize the organization.</td>
</tr>
<tr>
<td>• If the new leader does not have a visible trajectory, it might take time to get stakeholders, staff, and board to accept new leadership.</td>
<td>• Cost and resources may not be available.</td>
<td>• Can limit inclusivity.</td>
</tr>
<tr>
<td>• Diversity of leaders available or interested may be limited.</td>
<td>• Can require a lot of time.</td>
<td>• Limits low-term shadowing opportunities.</td>
</tr>
<tr>
<td>• Wages for already developed leaders are higher.</td>
<td>• Risk not finding the right person.</td>
<td>• Hiring might be done too quickly.</td>
</tr>
<tr>
<td></td>
<td>• New hire must adapt to the culture and internal procedures.</td>
<td>• A person not dedicated to the mission of the org. can be hired.</td>
</tr>
<tr>
<td></td>
<td>• New leader expected to follow processes in place.</td>
<td>• Shift the organization and culture in a direction not aligned with the mission.</td>
</tr>
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</table>

### New Ideas and Creativity

The most common theme found in both the literature and in interviews which is also listed in Table 2, was the belief that an external leader could come with new and fresh ideas. External hires could also bring more creativity and diversified knowledge. This was definitely an advantage to this model. In her interview, V.V. states, “I've had some external hires that I've been very impressed with because they come with diversified knowledge. They come with
different solutions. They come with a fresh perspective, and some people are really creative” (V.V. Expert Interview 4, April 23, 2021).

There was also a sense that external hiring of a leader could help with the “renewing” process of an organization. Calocarivas stated, “If one is not careful, if one is not renewing the team constantly, then you may create a stale environment where people basically just do what they have to do like any other job” (R. Calocarivas, Expert Interview 1, April 5, 2021). This new hiring of external leadership could be a time for brainstorming of new ideas and a new direction.

**Much Needed Diversity and Talent**

This model can be especially helpful when organizations are looking to diversify their staff team, invest in emerging BIPOC leaders, and/or fill current voids in the organization. Now more than ever, younger emerging leaders are looking for opportunities to lead and share their ideas. By looking to hire individuals that are looking to grow alongside an organization that aligns with their own passions, an organization can make transitions a time for them to shift its culture or modernize aspects of the organization as needed. I personally believe in the importance of hiring individuals who have the cultural competency to serve and lead an organization and the people it serves. Hiring externally can help if that’s not in place.

When talking about the advantages of hiring externally for diversification of an organization and its leadership team, I would like to point out an important argument. Patricia St. Onge, et.al., authors of Embracing Cultural Competency: A Roadmap for Nonprofit Capacity Builders, observe that organizations recruit leaders of color who are “bicultural” and comfortable navigating the dominant culture which does nothing to address current systems of oppression that also exist in the nonprofit sector (St. Onge, et.al., 2009 p. xxiv). So, hiring externally to superficially address issues related to lack of diversity is not enough. Hiring tokens of diversity is not enough. An organization must be ready to take on the internal and external challenges that may come with finally becoming a multi-cultural organization.

**Cost and Time**

A common disadvantage that came up as a common theme was the idea around cost and time. Hiring externally can be costly for an organization that may or may not have a budget for
leadership transitions. Directing funds solely for externally hiring of a new leader may limit the funding available for development and support for current staff. As Palma mentioned in his interview, “Leadership can fail when investments aren’t made to support existing staff” (M. Palma, Expert Interview 2, April 8, 2021).

Organizations may also end up spending more than available in hiring externally. Costs only continue to increase as one considers the time associated to the learning curve of a new hire. Rowe, et.al, coauthors of Leader Succession and Organizational Performances argue, “…. that new leaders take time to lead the organization to reconstruct (learn) new ways to do things here. We argue that new leaders need time to also accumulate organization-specific knowledge before they can take actions that will positively affect performance” (2005, p. 202). This is part of the learning curve that may take months to a year for the new leader to fully integrate.

Resistance and Unwanted Change

There might be some resistance with an external leader, and it might take some time to get stakeholders, staff, and the Board of Directors to adapt to a completely new person. This can especially become the case if the hiring is done too quickly or if it is not done in an inclusive way and does not keep the current staff, its organizational culture and its mission in mind. An organization runs the risk of hiring a person not dedicated or interested in the mission and values of the organization. This can result in an unwanted shift in the organization culture and mission. In his interview, Calocarivas states that when organizations hire externally that run the risk of, “….being mostly interested in whatever the business and organization gains from the knowledge of the external individuals that they hired” and not so much what is best for the organization (R. Calocarivas, Expert Interview 1, April 5, 2021).

I argue that the most successful way of combating this risk and that of hiring the wrong person is to build a leadership pipeline focused on internal leadership development well before a transition occurs. In an article titled Groom to Grow, the co-authors argue that, “Two of the most important decisions a board can make are choosing who the next leader’s going to be and making sure that leader is set up for success (Tuomala, et.al., 2018). Co-authors Tuomala, Yeh, Smith, and Milway make a case for not only grooming the new leader, but also, “…. groom your stakeholders—staff, donors, partners, and board—to accept new leadership” (Tuomala, et.al.,
They discovered that, “the best way to forge this acceptance was to give the rising stars carefully structured chances to shine before they assumed the mantle of authority” (Tuomala, et.al., 2018). Only then will stakeholders feel more comfortable with the new leadership.

Internal Leadership Development

Although I found most literature about transition models focused on external hiring of leadership, I did find common themes related to internally developing leaders. One of the reoccurring themes that the interviewed experts agreed on, and that I also experienced in my own participatory observations, is that there are more positive advantages to an Internal Leadership Development (ILD) model compared to model focused on hiring externally from outside the organization. Table 3: Internal Leadership Development (ILD) Model, summarizes some of the main themes and arguments. These themes are listed as advantages and disadvantages to an ILD model and are also based on a literature review, the expert interviews, and my own participatory observation.

Table 3: Internal Leadership Development (ILD) Model

<table>
<thead>
<tr>
<th></th>
<th>Literature</th>
<th>Expert Interviews</th>
<th>Participatory Observation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
<td>• It can be easy to get stakeholders, staff, and board to accept internal leadership.</td>
<td>• Internal know how and experience with organizational culture.</td>
<td>• Familiarity of the organizational culture.</td>
</tr>
<tr>
<td></td>
<td>• There is a desire to assume formal leadership roles.</td>
<td>• Talent and potential leaders are readily available.</td>
<td>• Longer standing relationship with existing staff, internal and external stakeholders.</td>
</tr>
<tr>
<td></td>
<td>• Commitment to the organization and mission exists already.</td>
<td>• Opens opportunities to incorporate collaboration between staff and future leader in the transition.</td>
<td>• Commitment and passion for organization’s mission is there.</td>
</tr>
<tr>
<td></td>
<td>• Developing internal leaders and capacity building is fundable.</td>
<td>• Funding support can be accessible due to existing partnerships.</td>
<td>• Easier learning curve.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Collaborative model of transitioning.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Less costly for the organization.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Transferring of information is easy.</td>
</tr>
</tbody>
</table>
**Disadvantages**

- Possibility of turn-over during the transition is high.
- Possibility of not enough time given to transitioning ED to transfer the networks.
- Lack of new and creative ideas.
- Can take a long time and resources to develop leaders.
- Could limit expansion.
- Biases towards areas of growth.
- Leader can leave before the transition is complete.
- Can cause tensions among existing staff.

**Internal Knowledge and Learning Curve**

A ILD model allows for a continuation of certain values while also creating an opportunity for an organization to grow and expand in a new but mission connected way. Although, each case will be different for each organization and its specific needs, I argue, along with this data, that the ILD model results in more beneficial outcomes long-term. This is especially true for organizations of budgets at 1 million dollars or less who may not have a set aside budget for leadership development. There is already an internal know-how and organizational culture knowledge that comes with internal leaders. V.V. states that, “Being familiar with an organization with their policies, with their procedures, with their culture, with their philosophies with their mission statement, I think that's absolutely necessary for success” (V.V., Expert Interview 4, April 23, 2021). There are many positives that come when there is already full commitment to the organization and its mission.

The idea of not having to spend months to a year training a new leader of an organization sounds pretty appealing in my opinion. This learning curve often leads organizations to hire too quickly as a way to avoiding the time spent in recruiting when there is a training time needed. Often organizations resort to hiring interim executive directors in the meantime they hire the right person, which again can increase costs and time spent with the transition. The use of an interim director can have a variety of benefits including specialized skills and expertise related to a new vision or change management (Adams, 2010, 281-283).

Knowing that MI could have hired an interim director but chose to invest time for my own development as its next leader makes me feel honored and fortunate. I do believe that there are many advantages to being part an organization for so long and together growing and evolving with it. My own learning curve has been minimal, as the opportunities for development and growth were provided to me and those that were not available through MI, I took action on. A
direct example of that being my pursing of this graduate degree in Nonprofit Administration. Dr. Manjon shares that, “There is internal organizational knowledge and there can be less of a learning curve with internal leaders” (S. Manjon, Expert Interview 3, April 10, 2021). Having the knowledge of the ins and out of an organization, its current culture, and current relationship with the Board of Directors, stakeholders, and the community served is a huge advantage for the incoming leader.

**Wider Acceptance**

Another common theme illustrated in Table 3 is the fact that with internal development there is wider acceptance of new leadership. It’s a common belief that it is easier for the current staff, the board of directors, stakeholders, and partners to accept and adapt to leaders they already know. Based on my experience, I have realized how this transition has increased internal organizational opportunities to strengthen collaboration between MI’s staff and the Board of Directors. I am fortunate to have cultivated long standing relationships with the existing staff and thanks to my current position, also with internal and external stakeholders.

This trust that I have built with them has helped in my own leadership development and overall buy-in. According to Roueche, et al., employee trust in the leadership increases employee buy-in for proposed ventures, including transitions. This also facilitates the development of communication systems within an organization (p. 9). These communication systems are instrumental when making organizational changes or implementing actions, and they come easier when the leader is from within the organization (Roueche, et.al.,1989, p.6-9).

**Possible Increased Funding Support**

The majority of the topics covered are in favor of a ILD model. They suggest that an ILD model can be easier and more affordable for organizations, and most importantly, it can ensure that the chances for the new leadership to be successful are higher. Again, this can be mostly true for organizations with a budget of 1 million dollars or less. Keeping in mind, interviewee Mauricio Palma’s statement about organizations not going back to foundations that have supported them in the past, it is argued that developing internal leaders is a very fundable ask. Funding support can be accessible and available due to existing partnerships and relationships with stakeholders that
care about capacity building and staff development. I can argue that my own internal development has been quicker and less costly for MI than if they would have hired someone externally.

I also want to point out that Palma’s experience and my own are not all encompassing of the whole philanthropic sector. There is still vast resistance from foundations when it comes to funding organizations led by people of color. According to Buteau “the Fund the People’s 2019 “Talent Justice” report found that executive directors of color are more likely than their white counterparts to state that foundations take a “wait-and-see” approach to funding—a practice during executive transitions in which foundations wait to fund an organization until they see that the incoming executive performs well” (2019). This is an issue when most organizations led by people of color are mostly smaller organizations that rely on foundation support. This unfortunately means there is still a lot of work to do for organizations that have people of color leading as it hinders transitions and leadership in general.

Some Disadvantages

Even though the ILD model is the one that I am advocating for, I acknowledge that there are some identified disadvantages in the data. These disadvantages are mostly case by case and circumstantial in my opinion. In contrast to to external hiring where the thought was that new leadership would bring new and fresh ideas, the counterargument is the possibility that internally developing leaders could limit the creativity and evolution of an organization. There are also often biases that come with internal leadership transitions that include not being able to identify what areas the organization and one as a leader can improve on because of internal biases or comfort level. Some organizations can also be stuck in existing ways.

For organizations that are stuck in their own ways, it’s important to acknowledge this situation. Manjon argues that, “Each ED is different; processes should not be in place when he/she/they arrive” (S. Manjon, Expert Interview 3, April 10, 2021). It is important to understand Dr. S. Manjon’s point that with new leadership, internal or external, comes the fact that this new leader will come with her/his/their own ideas, techniques, and processes. This could bring a sense of tension among existing staff, but it is important as new leaders and existing staff to be open to new or different ideas.
Section 5: Implications and Recommendations

This research has led to a clearer understanding of leadership transition models and best practices for those considering embarking in leadership change. It also has started a surface level finding of current existing literature around internal leadership development. The research is a solid starting point for a deeper dive into future research around this topic. Even though there are limitations and the number of expert interviewees was not extensive, my own participatory observations and the findings in this research have allowed for a thorough analysis. This analysis has resulted in what I am calling the Internal Leadership Development (ILD) model.

Figure 3 below shows the ILD model I am proposing. The ILD model serves as a template that can be tailored to an organization’s needs. The model follows 5 phases that include:

- Phase 1: Decision and Planning
- Phase 2: Preparation
- Phase 3: Exploration and Planning
- Phase 4: Internal Leadership Development
- Phase 5: Conclusion and Beginning

The 5 phases are to be completed from 1 to 4 years depending on the organization’s current timeframe for its transition.

Figure 3: Internal Leadership Development (ILD) Model

*Transition Planning Committee (TPC)*

Created by Mina Cervantes, 2021
**Phase 1: Decision and Planning**

This is by far one of the most important phases as it will create the foundation for the whole transition process. As I have stated early on in the report, succession planning is crucial for any and all transitions to be successful. As Tom Adams states, “At a minimum, good succession planning includes the development of positive language and attitudes about succession, good emergency backup plans, a succession policy, an organizational culture that encourages the growth of new leaders and adequate preparation for the planned departure of an executive” (Adams, 2010, p.173). Succession planning as the foundation for any transition is even more important given that many organizations rarely talk about succession and worse do not plan for it. MI had a four-page succession plan in place three years before starting its two-year transition process. Talking about a transition for that long has been an advantage in this case because a founder is retiring.

This phase also requires the organization to identify the best timeframe and timeline for its transition. This is most important because the transition timeline should consider the reason why the transition is occurring. Many reasons for a transition may be taking place. Will a founder or long-term leader be retiring? Is a new Executive Director changing careers? Or is this an emergency due to a fired employee or a leader’s death? Regardless of the reason, the transition plan and timeline should be tailored to the reason.

**Phase 2: Preparation**

Phase 2 is all about purpose and support. Once the organization determines the reason of departure, the organization should identify the purpose for the transition. It is also crucial to start gaining the support needed to start a transition plan. This is where the inclusivity and collaboration part of the transition comes in. How involved is the Board of Directors? Is the current staff aware? Both the Board of Directors and the staff will be a crucial part of the transition, so it is important to include them in the process from the beginning. Communicating this internally and making it a common and frequent conversation topic can help with buy-in and support early on. The other important step during this phase is the creation of a Transition Planning Committee (TPC). MI created a TPC made up of former board members and the executive committee of the current Board of Directors. This was especially helpful to MI
because it brought back individuals that had historical knowledge of MI and included those currently involved in MI.

**Phase 3: Exploration and Planning**

During this exploration and planning phase, it is recommended to allow the TPC to conduct an assessment of where the organization is at, what are some needs, and shared values. MI successfully conducted an internal organizational assessment that helped guide the transition needs and strengths. This was also crucial for Board and staff buy-in because staff felt listened to and instrumental in the transition process. This was mainly due to the fact that they were asked about possible leaders from within. This step alone will help the Board of Directors and the Executive Director in identifying current staff who are interested in developing into the Executive Director or leadership roles. Once the results of the assessment are gathered, an organization can more easily develop the remaining steps of the transition plan and can move to Phase 4.

**Phase 4: Internal Leadership Development**

In my opinion, Phase 4 is also one of the most important phases of this ILD model. During this time, the organization already knows of the individuals interested who are a good fit for the leadership role and they must identify the capacity building opportunities needed. These are individualized trainings, skill building, and institutional opportunities for this individual to best develop into the role. Some of these activities include (1) opportunities to shadow the Executive Director, (2) leadership integration such as attending stakeholder and Board of Director meetings, (3) cultivation of the team, (4) looking for and securing capacity building funding for the transition focused on internal leadership development, and (5) creating an interim leadership role in which the developing leader can slowly partake in more Executive Director duties and privileges. In my leadership development experience with MI, I was provided all of these capacity building opportunities. In many ways, it has made me feel more connected to and invested in MI and its mission.

**Phase 5: Conclusion and Beginning**

The conclusion phase is also the beginning phase. In this last phase it is important to go back to the assessment completed by the TPC and make sure that all the areas of growth
identified are addressed. The organization should make sure that there is no sense of uncertainty and confusion during this phase. Ongoing support in the way of executive coaching for the new leader is important as well as ongoing staff development moving forward. During this phase, the Board of Directors and the exiting Executive Director should decide the role that they want her/him/they to take part in after the exit date. Will the founder or long-term Executive Director serve on the Board of Directors? Will a special consulting or advisory role be created? It is advised to include the incoming Executive Director in this process if there are implications after she/he/they take on the new position. Finally, a communication must go out to all stakeholders, supporters, and the community served. This is a great opportunity to further fundraise if the organization has not been doing so throughout the transition.

**Additional Recommendations**

In addition to this model completing this research has allowed me to identify some additional recommendations when considering a leadership transition.

1. **Develop & Cultivate Leaders from Within:** Create a culture of learning and cultivate new leaders internally.
2. **Invest:** Continue to invest in the team and emerging leaders long-term.
3. **Create Opportunities:** Encourage personal and team growth as well as create leadership development opportunities throughout the organization.
4. **Humanize Leadership:** Recognize the dignity and worth of your team members by valuing their skills, showing appreciation, and encourage a space of belonging.

Overall, the goal is to create a safe space where staff will want to learn and facilitate a career ladder that engages leaders and helps them develop into higher positions that allow them to move beyond where they started.
Section 6: Conclusion

This research came about because of my own experience in a leadership transition. I began asking questions around leadership transition models and whether or not other organizations were also thinking about them. The general answer is not really. Most organizations do not have a succession plan in place, let alone a transition plan in mind. This is a terrible mistake. Especially when other questions come into play when thinking about transitions. What about leadership transitions by race and ethnicity and age? How are we as part of the nonprofit sector investing and encouraging younger emerging BIPOC leaders to take on higher positions in organizations? These are only two of many crucial questions that must be addressed.

The process of researching leadership transitions models and the best practices out there allowed a better understanding and answers to the main research questions that came with this report. There are indeed disadvantages and advantages to both the external hiring of leadership model and an internal leadership development model. However, with this report I have laid out some reasons why an internal leadership development model will yield the most long-term success. The model represented in this report provides recommendations and suggestions for additional best practices that may not have considered for organizations thinking about or participating in leadership transitions. This analysis provides a starting point for organizations to begin thinking about and putting a leadership transition model in action.

I realize that there were limitations to this report, including limited literature gathered, expert interviews, and my own biases developed from my personal experience. Further research should be done to understand ways to internally develop leaders because this was a main argument of my report. What are best practices and where should organizations spend most of their time and energy in when it comes to internally developing staff? Another main question that arises from this report is if an organization does want to follow an internal leadership development model, what are the best ways to identify leaders from within? Overall, it is in the best interest of any organization to develop its internal staff team, regardless of whether or not it is for a leadership transition. The benefits can be endless.
References


Mirna is a young Latina with a demonstrated history of 10 years working in the nonprofit sector. She is a daughter of Mexican immigrants and is rooted in her Mexican culture and traditions. She is currently the Associate Director of The Multicultural Institute, a community-based nonprofit organization addressing the Latinx Immigrant community's issues in three counties of the California Bay Area. Mirna's interest and determination for strategies and projects focused on Latinas in Leadership began five years ago when she was promoted to her leadership position. Her promotion was the first step of the organization’s leadership transition plan. She has climbed the career ladder within this organization which has allowed her to grow as a professional and develop into a young leader. Her personal and first-hand experience have shaped her career and life passion for participating in programs and services tailored towards the immigrant community. Mirna is an experienced team leader with a proven ability to make and maintain networks and relationships with donors, stakeholders, community partners and staff. She is an active listener with excellent verbal and written communication skills who thrives in deadline-driven and creative environments. Her work experience centers Community Outreach to the day laborer and domestic worker community, Direct Service to monolingual Spanish speaking immigrant adults, Nonprofit Administration and Development, Donor Cultivation, and Grant Writing and Contract Management. Mirna has a Bachelor's Degree in Sociology from the University of California Berkeley and is currently pursuing a Master of Nonprofit Administration at the University of San Francisco.