

Succession Transition Framework for Founder-Led, All-Volunteer Boards and Agencies

A reflective guide for releasing leadership and reweaving stewardship developed by Pure Momentum Consulting for the 2025 Board Empowerment Program of the Community Foundation for Monterey County.

1. Introduction & Intent

Dear Founder,

This guide was created for *you* — the one who said yes long before there was a structure, a staff, or even a clear path. The one who gave your nights and weekends, your spirit and strategy - your whole heart - for the sake of a mission that mattered.

Now, you're discerning how to let go or how to hand something off that doesn't feel fully finished. Or how to take your hands off the wheel when people around you are asking, "But who will drive?"

This document is here to help you *pause, reflect and release* with clarity and care. It's also here to help your board grow into a truer form of stewardship, even if it's messy, emotional or not quite unanimous. You're not failing...you're listening.

You're not abandoning the work. You're blessing what comes next.

Purpose of This Guide

- To support you in a leadership transition even if everything isn't perfect
- To offer grounding when it feels risky or premature to step back
- To help your board navigate the change with structure, reflection and integrity

Guiding Truths

- Leadership transitions are evolution, not endings.
- You don't need full organizational readiness to begin — just truth.

- You deserve spiritual and emotional closure.
 - Your board needs space to grow even if they don't feel ready yet.
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2. Founder Readiness: Letting Go Amid Imperfection

Sometimes the organization's next chapter can't begin until you release your hold on the current one, not because you're clinging, but because you're still carrying more than your share.

You're allowed to let go before it's all tied up in a bow.

You're allowed to trust your internal readiness, even if the external conditions aren't perfect.

Reframing the Timing

Your timing might be based on:

- Emotional exhaustion or burnout
- A spiritual release or inner clarity
- The realization that staying longer could stagnate the agency or harm your wellbeing
- The need to redirect your energy toward healing, rest, or new callings

Letting go is not giving up.

Letting go is part of your legacy.

Founder Reflection Prompts

These are for you to help you hear *yourself* more clearly and not to justify anything to anyone else. Let these questions guide your journaling, your release, and your preparation.

- What am I carrying right now that no longer belongs to me?
- Where is fatigue, grief or resentment showing up in my leadership?
- If I waited until "everything felt ready," what fear would I be protecting?

- Who am I beyond this organization? What's calling to me next?
 - What do I need to say, do or bless to feel complete in this role?
 - How do I trust that the mission won't collapse even if it trembles a bit?
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3. Board Support: Holding the Transition with Integrity

Your board may have many feelings about your stepping back, and that's okay. Members may be confused, caught off guard or unsure of your successor. They may also feel scared, guilty, or deeply loyal to *you*, not just the mission.

This is normal. Rather than silence those feelings to goal is to create space for them to emerge in a way that leads toward trust. You are not responsible for carrying everyone's discomfort, but you *can* model how to name it and move through it.

Safe Group Discussion Prompts (for Board Meetings)

These questions help the board reflect together. Consider introducing them during a retreat or dedicated transition meeting.

- What are we afraid might happen with this transition?
- What are we trying to protect and why?
- Where are we clinging to control instead of trusting our shared capacity?
- What support do we need to step into fuller leadership?
- How can we honor the Founder's contributions while affirming new leadership?

Encourage honesty without blame. Let grief and hope sit side by side. This is part of honoring the *relational* nature of succession — not just the logistical one.

Private 1:1 Reflection Questions

For board members who you sense may be resistant or upset about your transition or your chosen successor, consider having private conversations first. These should be gentle, grounded and clear:

- What concerns do you have about this transition or the person I've named?
- What would help you feel more confident or secure about what's next?
- Where do you feel unseen, unheard or left out of the process?
- What part of this change feels personal or emotionally charged for you?
- If you could wave a magic wand, what would you want this transition to look like?

Remember: your job is not to convince. Let their truths be spoken without letting them dictate yours.

4. Leadership Naming and Succession Integrity

You may already have someone in mind (a new Board President, an Interim ED or a trusted steward). And not everyone will agree. Leadership should evolve. If it didn't, the agency would always rely on your specific way of doing things.

That's okay. This isn't about popularity. It's about alignment. If your choice is rooted in care for the mission and a desire for continuity (not control), you are on the right path.

If There's Pushback

- Don't rush to change course to avoid conflict
- Invite transparency — not triangulation or gossip
- Stay centered in the mission: What does the organization *need* next?

You are allowed to say:

"This person isn't me, and that's the point."

Supporting the New Leader

Whether you're appointing or the board is voting, help create a container that will support the new leader without hovering.

Consider:

- A Founder letter of blessing or verbal affirmation
- A clearly defined role for yourself (if you're staying involved)
- An invitation for the new leader to ask for support *only when needed*

Help your board understand:

The new leader will need room to find their own rhythm. Grace and accountability must walk together.

5. Final Blessing & Releasing Charge

As you cross this threshold, may you know:

You are not leaving your legacy behind but instead *releasing it into new hands*.

You are not erasing your imprint. Rather you are opening the door for others to write the next chapter.

And you are not losing your seat at the table. You are choosing a new seat that reflects who you are now.

Take a deep breath.

Say the thing that needs to be said.

Write the letter.

Make the call.

Bless the successor.

And walk forward with your head high, not because everything is perfect, but because you listened.

And that's how stewardship begins.

Founder and Board President Succession Transition Guide *Instructions for the Founder of a Volunteer-Led Organization*

Purpose & Intent

This guide is designed to walk you, as the Founder and current Board President, through a healthy and structured leadership transition. You've been carrying both governance and operational leadership in an all-volunteer organization. Whether you're preparing to release both roles or step back from the board while continuing operations, this plan will help you:

- Release your role(s) with clarity and grace
- Support board and organizational continuity
- Reduce confusion and conflict during the handoff
- Honor your legacy while opening space for future leadership

You do not need to have everything "perfectly ready." This is about shared stewardship and thoughtful transition.

Section 1: Choose Your Succession Path

Path A: Appointing the Next Board President

If you are appointing the new Board President directly:

- Confirm your authority to do so (check bylaws or precedent)
- Communicate the *why* of your decision clearly to the board
- Offer private conversations to board members who may have strong feelings
- Invite the board to affirm the appointment with a symbolic and documented resolution

Path B: Holding a Vote for the Next Board President

If the board will vote on your successor:

- Help define eligibility and criteria for nominations
- Support the board in setting a clear and fair voting timeline
- Encourage pre-vote conversations to reduce tension during the meeting
- Prepare for the emotional tone regardless of the result (even if it's not your chosen candidate)

Section 2: Clarify Your Level of Release

You are invited to name clearly: *Am I releasing both my governance and operational leadership roles or just the Board President role?*

Full Step Back: Releasing Both Roles

- Begin preparing others to carry forward the operational responsibilities
- Identify and support any volunteer leaders who can hold parts of the day-to-day
- Acknowledge your own feelings around legacy and loss
- Prepare for a ceremonial or symbolic full release (letter, ritual, board blessing)

Partial Step Back: Stepping Down as Board President but Continuing Operations

- Define your new role (e.g., Operations Lead, Interim Director, Founder-Operations)
- Work with the new Board President to clarify decision boundaries
- If needed, create a written MOU between you and the new President
- Model mutual respect and clear communication in your tag-team period

Section 3: Prepare the Board for the Transition

- Normalize that some board members may react strongly or emotionally
- Be proactive in how you share the transition: thoughtful timing, clear framing
- Host a board conversation or retreat to reflect, grieve and align
- Use 1:1 meetings if needed to support high-influence board members who need extra context
- Invite curiosity, not consensus.

Section 4: Tag-Team Transition Timeline (3-Month Map)

If Full Step Back:

- Month 1: Founder present in meetings as ceremonial support, not decision-maker.
- Month 2: Board President fully leads, Founder steps away entirely.
- Month 3: Optional legacy ritual or handoff ceremony.

If Partial Step Back (Founder Still in Operations):

- Month 1: Joint visibility in meetings; clear distinction of governance vs. operations roles.
- Month 2: Founder leads operations only; Board President manages board agenda and communication.
- Month 3: Begin formalizing long-term structure (e.g., consider hiring or developing ED pathway if needed)

If you're continuing operational work: remain visible in your role but defer to the Board President for governance matters.

Section 5: Communications Plan

Internal

- Use a prepared announcement script to introduce the transition
- Be transparent about your decision and new role
- Clarify who does what going forward (Founder vs. Board President)

External

- Send a joint message from you and the new President to donors and partners
 - Honor your ongoing involvement (if applicable)
 - Position the transition as a strengthening, not a loss
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Section 6: Support Structures for the Road Ahead

For You as Founder

- Allow yourself to grieve and celebrate
- Consider coaching or support during the shift
- Be honest about your capacity if you're staying involved in operations

For the New President

- Offer orientation materials and your insights
- Give them space to lead their way
- Encourage them to get peer support or board mentorship

For the Board

- Conduct a debrief 3–6 months post-transition
 - Consider capacity needs for replacing your operational work
 - Create space for board members to reflect on lessons and legacy
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Final Note

You are not "leaving" the mission — you are leading in a new way. This transition honors your past and protects the future. Whether you step out fully or stay involved in operations, your clarity and care will ripple through the organization for years to come.

You're allowed to let go, even if some pieces are still unfinished.

And you're allowed to stay involved, with new boundaries, rhythms, and rest.

This is your next act — not your exit.