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June 20, 2013

Dear Friends,

A few weeks ago we did a series on founder syndrome. This week, we are providing more resources to help with planning leadership transitions, especially for organizations led by their founder.

Every founder knows that if their organization is successful, at some point, it will need to be led by someone new. Founders, and their boards, can plan in order to ensure that these transitions are smooth and successful. Whether a founder is planning on leaving in 2014 or 2024, it is never too early to start planning. We hope these tools can start your organization thinking and preparing in order to ensure its long-term sustainability.

Sincerely,  
The Firelight Team

*(Open for Applications) WHEAT Trust Fund*

*(Call for Nominations) The Drivers of Change Awards*

*(Resource) Questions for Self-Reflection: Am I Still the Leader This Agency Needs?*

*(Resource) A Succession Readiness Checklist*

*(Resource) Founder Transitions: Creating Good Endings and New Beginnings, A Guide for Executive Directors and Boards*

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(Open for Applications) WHEAT Trust Fund

As an African Feminist Women's organization, the The Women's Hope, Education and Training (WHEAT) Trust is committed to the values of empowerment and education of grassroots women. WHEAT strives for a world in which there is social justice, equality and respect for human rights for women. It is their vision and responsibility to contribute to a society where all women have access to education, training and sustainable incomes, and it is our function to channel the support of others to help achieve that. WHEAT's mission is to mobilise financial resources to support local, rural and national initiatives led by grassroots women, which will lead to the achievement of this vision.

What we fund

WHEAT funds are available to women-led community based organisations (CBOs) that are making advancement in the following areas:

- HIV and AIDS
- Sustainable income for women
- Gender based violence
- Refugee women and migrant rights
- Lesbian women's groups
- Environmental sustainability

What we do not fund

- Organisations whose aim is to convert people to a religion or to evangelise
- Organisations that have links to political groups/organisations
- Government departments
- Terrorist activities
- Academic organisations and/or institutions
- Women's organisations that are not led by women.

Criteria for the review of grant applications.

Preference will be given to women's groups/organisations that meet the following criteria:

- Women from rural and peri-urban areas
- Women-led grassroots organisations that cannot yet access formal funds
- Groups/organisations that are making a contribution in the development of women's rights
- Women-led grassroots organisations that commit to using the grant for the development of the organisation
- Women-led grassroots organisations that are able to prove the impact of their group/organisation to the development of the community
- Women-led grassroots organisations that are sustainable

How to apply for a grant: Applications are accepted on a rolling basis

Interested organisations are asked to send applications to:

- P.O Box 18046, Wynberg, Cape Town, 7824
- Or by fax 021 797 2876
- Or you can send a "please call me" on 082 6932805
- Or email: [grants@wheattrust.co.za](mailto:grants@wheattrust.co.za)

Application forms will be accepted in English

WHEAT Trust will send a confirmation receipt of the application via post and it should be received within 30 days

The outcome of the application will be communicated via post and should be received within approximately 90 days after receipt of confirmation of receipt of application letter.

Potential applicants are also welcome to call the office in order to clarify any information (021 762 6214).

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(Call for Nominations) The Drivers of Change Awards

**Done something great? Shout about it!**

The Drivers of Change Awards celebrate bold initiatives that are working to change the systems that keep people in poverty in southern Africa - whether by businesses, governments, civil society groups, or individuals. Their example inspires us to do things differently so that our efforts can be more effective, especially by working together with others. Nominations for the award are invited from all southern African countries.

**Who can enter?**

- Corporations with corporate social investment (CSI) programmes or corporate foundations, attached to a company or where the grantmaking programme is run by a self-governing foundation separate from the founding corporation
- Independent foundations and trusts, community foundations, grantmaking NGOs and trusts, family foundations and grantmaking trusts and private foundations
- Individuals from any sector across business, civil society or government who have played a significant role in developing new, innovative and inclusive approaches to anti-poverty and development work
- Government or intergovernmental agencies, programmes or initiatives that create new possibilities and develop new models for policy engagement in the national and regional policy spheres. Ministries, government departments, parliaments or parliamentary forums are included.

The Drivers of Change Awards are presented in partnership with the Mail & Guardian's Investing in the Future Awards.

Submit nominations at [investing.mg.co.za](http://investing.mg.co.za). Entries close on **27 July 2013**.

For more information contact Shekeshe Mokgosi at +27 11 318 1012 or [smokgosi@southernafricatrust.org](mailto:smokgosi@southernafricatrust.org).

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(Resource) Questions for Self-Reflection: Am I Still the Leader This Agency Needs?

*If you are a founder or executive director, you might be questioning whether or not it is time to leave your position. Thinking through and responding to these questions can help you to assess your personal readiness to leave. They can also help you to assess whether your organization would be ready for your departure. Honest answers can help you to plan what actions you can take to prepare both you and your organization for a leadership transition.*

### **1. My On-Going Effectiveness**

- In what ways will this agency be changing over the next five years? What skills will it take to lead those changes? Do I have them?
- Are there new things I suspect this agency should be doing for its constituents that I just don't have the energy or interest in taking on?
- What level of excitement do I feel most mornings on my way to the office? What new skills or better ways of doing my job have I developed over the past couple of years? Am I eager to learn and improve my skills?
- Do I continue to be effective in building the leadership and management skills of my direct reports? What new duties or responsibilities have they taken on in the past two years?

### **2. Personal Barriers to Leaving: If it became clear to me that I should consider leaving my job, what personal barriers would I encounter?**

- Can I conceive of a career move that would potentially excite and re-energize me? Or do I assume I'll be bored and without meaning in my life?
- Do I fear I could not get another job because of my age? Do I have the skills for a different kind of job?
- Am I financially constrained? Do I not yet have enough set aside to retire or to work fewer hours and at a lower salary?
- Are the professional identity and status I have in this job so critically important to me that I don't want to give them up?
- Am I concerned about leaving some things undone in the agency? Do I believe there is no one out there who can do this job as well as I can or could do it even adequately? Would the agency go into decline without my leadership?

### **3. Organizational Barriers to Leaving**

- Would staff and board resist my decision to leave? Might they even feel angry or abandoned?
- Would I be leaving the agency in less than good shape? Are some key managers under-skilled and dependent on my close guidance?
- Is the management team unable to run the agency for a significant period of time without me?
- Is the board up to managing a leadership transition?
- Are there funders and major donors whose support I assume is dependent on my presence?
- Are there key relationships held by me alone?

*This self-reflection tool comes from Building Leaderful Organizations: Succession Planning for Nonprofits, written by CompassPoint Nonprofit Services. The full publication can be accessed at the following link:*

[http://www.compasspoint.org/sites/default/files/docs/research/526\\_buildingleaderfulorganiza.pdf](http://www.compasspoint.org/sites/default/files/docs/research/526_buildingleaderfulorganiza.pdf)

(Resource) A Succession Readiness Checklist

*When the following conditions are in place, an agency can expect a relatively smooth transition to new leadership whenever it might occur. An agency might determine which elements below are lacking in its current operations and then create a “succession plan” or “capacity building plan” that prescribes activities and timelines for filling the gaps. The agency is then ready for leadership transitions, foreseen or unforeseen.*

- A strategic plan is in place with goals and objectives for the near term (up to three years), including objectives for leadership talent development.
- The board evaluates the executive director annually on general performance and achievement of strategic goals.
- The board, based on its annual self-evaluation, is satisfactorily performing its major governance jobs—financial oversight, executive support and oversight, policy development and strategic planning.
- The executive’s direct reports, based on annual evaluations, are judged as solidly skilled for their positions.
- The top management cohort, as a high performing team:
  - Has a solid team culture in place in which members support one another and can reach decisions as a group efficiently and harmoniously;
  - Shares leadership of the organization with the executive in having significant input to all major agency decisions;
  - Can lead the organization in the absence of the executive; and
  - Has authority to make and carry out decisions within their respective areas of responsibility.
- Another staff person or board member shares important external relationships (major donors, funders, community leaders) maintained by the executive.
- A financial reserve is in place with a minimum of three months’ operating capital.
- Financial systems meet industry standards. Financial reports are up to date and provide the data needed by the board and senior managers responsible for the agency’s financial strength and viability.
- Operational manuals exist for key administrative systems and are easily accessible and up to date.
- Top program staff members have documented their key activities in writing and have identified another staff person who can carry their duties in an emergency.

*From CompassPoint Nonprofit Services:*

[http://www.compasspoint.org/sites/default/files/docs/724\\_successionreadinesscheckl.pdf](http://www.compasspoint.org/sites/default/files/docs/724_successionreadinesscheckl.pdf)

*CompassPoint has a section on their website with these and other tools related to executive transitions. Scroll down to the section on Succession Planning:*

<http://www.compasspoint.org/et>

(Resource) Founder Transitions: Creating Good Endings and New Beginnings, A Guide for Executive Directors and Boards

This guide provides concrete steps and a process that founders can use to manage their departure. The guide states that a well-planned leadership transition, especially by a founder or long-time executive director, often takes 18 months to 3 years. This is ample time to build capacity among key staff and board to keep the organization alive and thriving, through the leadership transition and beyond. The guide provides several short case studies of successful executive transitions at US-based nonprofit organizations.

This guide is part of a series of executive transition guides provided by the Annie E. Casey Foundation on their website:

<http://annie.e.caseyfoundation.org/KnowledgeCenter/PublicationsSeries/ExecutiveTransitionMonographs.aspx>

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As part of the Firelight Foundation's Capacity Building Program, Firelight provides "Newsflashes" to share relevant resources and information with our active grantee-partners via weekly emails and via post on a monthly basis. We hope that by facilitating access to information for grassroots, community-focused organizations, programming for children and families, as well as organizational development, is enhanced. Past editions of the Firelight Newsflash can be found on our website:

<http://www.firelightfoundation.org/resources/newsflash/>.

We welcome your comments, feedback and ideas for upcoming Newsflashes at [newsletter@firelightfoundation.org](mailto:newsletter@firelightfoundation.org).

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