

2026

LIT Needs Assessment Report



GLB Institute for Health Equity and Social
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GLB Institute for Health Equity and Social Justice

Leaders in Transition (LIT) Pilot

Needs Assessment Report

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Prepared by The Academy at GLB Institute

Executive Summary

Leadership transitions are a predictable stage of every organization's life cycle, yet for Executive Directors and CEOs of color, particularly Black nonprofit leaders serving historically marginalized communities in the San Francisco Bay Area, these transitions too often become organizational crises rather than planned moments of renewal. The Leaders in Transition (LIT) Pilot, a six-month initiative under The Academy at GLB Institute, is designed to interrupt that pattern by meeting mature leaders at the pre-contemplation stage of transition and attending to personal needs before organizational ones.

This needs assessment, conducted between April 2025 and April 2026, drew on four complementary sources: a literature review, semi-structured key informant interviews with eight African American nonprofit executives, who averaged 15 years in leadership; an online survey of nine Bay Area Black nonprofit leaders; and two focus groups with members of the LIT Advisory Circle. Together, these sources surface five convergent findings that shape the pilot's design:

- **Resource insufficiency is structural, not incidental.** Leaders framed under-resourcing as a racialized funding problem affecting Black-led organizations, not a personal compensation issue.
- **Well-being harm runs deeper than leaders acknowledge.** Survey self-reports minimized harm while interview disclosures revealed hypertension, panic attacks, sleep apnea, depression, and marital strain — evidence of normalized chronic stress.
- **Mission and community keep leaders in place, for better and worse.** A sense of calling sustains leaders but can also hold them in roles past the point of sustainability.
- **Transitions are most successful when intentional, and most are not.** Leaders described reactive exits, unprepared boards, and organizational collapse when succession fails.
- **Racial identity must be centered as strategic foundation.** Respondents called for an explicitly race-conscious, culturally rooted framework rather than a race-neutral capacity-building model.

These findings translate into five curriculum pillars for the LIT pilot: (1) Systemic Funding Equity and Organizational Sustainability, (2) Leader Well-Being and Health, (3) Peer Network and Community Infrastructure, (4) Succession Planning and Organizational Transition, and (5) Culturally Grounded Leadership Philosophy. The sections that follow detail the methodology, findings, and recommendations that support each pillar, along with implications for the broader field of nonprofit leadership development.

Background and Purpose

The LIT pilot was developed in response to a consistent pattern observed across Bay Area nonprofits: Executive Directors and CEOs of color leaving their roles without transition plans, resulting in leadership vacuums, lost institutional knowledge, and, in some cases, organizational closure. These outcomes are particularly devastating for organizations serving communities that experience the greatest disparities in health and the social determinants of health, because those organizations are often the only community-rooted infrastructure addressing those disparities.

GLB Institute's distinctive contribution to this problem is an approach that prioritizes individual leader needs before organizational transition planning. Traditional succession models begin with the organization: identifying successors, building transition timelines, and communicating with stakeholders. LIT begins earlier, at what the transtheoretical model of change calls pre-contemplation, before a leader has decided to leave, while the questions on their minds are personal, not procedural. Can I afford to leave? What would I do next? Who am I outside this role? These questions must be addressed before organizational transition planning can succeed.

This needs assessment was designed to answer three questions that shape the pilot's design:

- What do Black nonprofit leaders in the Bay Area actually experience in their roles, and what conditions drive their decisions to stay or leave?
- What personal and structural support do they need to transition well?
- What design principles should anchor a transition-support program that centers their needs?

The findings reported here reflect the experiences of a specific population: Black Executive Directors and CEOs in the Bay Area, whose voices have been systematically underrepresented in mainstream leadership transition literature. While the LIT pilot was initially framed to serve leaders of color broadly, the data gathered focused specifically on Black leaders, and the findings should be understood in that context. Expansion to additional communities of color will require complementary data collection.

Methodology

The needs assessment used a mixed-methods design combining four complementary sources: a literature review, key informant interviews, an online survey, and two focus groups with members of the LIT Advisory Circle. Triangulating across these sources strengthens confidence in findings that converge across methods and surfaces productive tensions where methods diverge. The Advisory Circle focus groups served a distinct role from the interviews and surveys. Whereas the latter captured leaders' experiences, the focus groups translated those experiences into concrete design guidance from seasoned advisors.

Literature Review

Two complementary literature reviews informed this assessment. The first synthesized peer-reviewed and practitioner research from 2000 to the present on senior nonprofit executives of color, with attention to thriving conditions, burnout, transition pathways, and structural inequities (drawing on Building Movement Project's Race to Lead series, the Annie E. Casey Foundation, BoardSource, the Bridgespan Group, the Center for Effective Philanthropy, Candid, the Stanford Social Innovation Review, and Nonprofit Quarterly, among others). The second focused on best practices for facilitating adult African American learning, drawing on Afrocentric pedagogical frameworks, culturally responsive teaching, and research on cohort and peer learning models (including Sheared, Collins, Gay, Hammond, Smith, and Dortch & Chen). One targeted web search in April 2026 supplemented the existing reviews with the most recent data on Black-led nonprofit funding patterns. Together, these sources framed both the design of the interview and survey instruments and the interpretation of findings.

Key Informant Interviews

Semi-structured qualitative interviews were conducted with eight African American nonprofit executives (three men, five women) who averaged 15 years in their leadership roles, with tenure ranging from 8 to 33 years. All participants were current or recently transitioned Executive Directors, CEOs, or Founders of organizations serving historically marginalized communities in the Bay Area. Interviews were analyzed thematically, with each theme assigned a "dose" score reflecting how many of the eight interviewees touched on that theme.

Online Survey

Nine Bay Area Black nonprofit leaders completed a 37-item online survey. The survey covered reflections on leadership experience, organizational functioning, transition readiness, and well-being, combining Likert-scale items, multi-select questions, and open-ended prompts. Respondents ranged in age from 40 to 60+, with 6 aged 60 or above. Tenure in current role ranged from 3 to 33 years.

Advisory Circle Focus Groups

Two focus groups were convened with members of the LIT Advisory Circle in February and March 2026 to translate the interview and survey findings into concrete program design recommendations. Participants included Omowale Satterwhite, CEO of Leadership Incorporated; Kimi Watkins-Tartt, Public Health Director of Alameda County Public Health Department; and Alicia Dixon, Principal and Founder of A Dixon Advising. Each participant brings deep experience either leading transition support programming for executives of color or leading large public-serving institutions through transition themselves. Discussions were facilitated by Michelle Williams and Carol F. Burton of GLB Institute and focused on cohort design, curriculum content, the program's distinctive value proposition, and the funding case for an individual-first transition support model.

Limitations

These are small samples typical of community-based participatory research with specialized populations, and findings should be interpreted as thematic directions rather than statistically generalizable conclusions. The convergence of themes across data sources, however, strengthens confidence in the identified patterns. An additional limitation is the sample's specificity to Black leaders; expanding the pilot to other communities of color will require additional formative research.

Findings

Five themes emerged consistently across the interview and survey data, and each was tested and elaborated in the Advisory Circle focus groups. A sixth set of findings, focused specifically on program design tensions, emerged from the focus groups themselves. Each finding is presented below with supporting evidence from the relevant sources, including the frequency with which interviewees (n=8) raised each theme.

Finding 1: Resource Insufficiency Is Structural, Not Incidental

Leaders consistently framed under-resourcing as an organizational and racialized issue rather than a personal compensation grievance. When asked what would have kept them, survey respondents cited fiscal sustainability, adequate staffing, and operational infrastructure, not higher salaries. One respondent wrote that they would stay given "sufficient fiscal resources to sustain the organization, and enough opportunities for entrepreneurial, enterprising, and strategic work." Another described the need for "the ability to lead, not just survive: adequate funding, systems, and staffing make leadership sustainable."

The interview data deepened this finding substantially. Money, finance, and accounting were the most frequently raised challenges in the interview set, mentioned by five of eight interviewees, the strongest "dose" of any organizational challenge. Interviewees described systemic disparities between white-led and Black-led organizations in access to funding, development staff, and philanthropic networks. Black leaders reported being brought in to "clean up" under-resourced organizations while watching white-led peers' access large grants with relative ease. One interviewee called for a minimum of two years of recurring foundation funding as a baseline benchmark for sustainable leadership.

These accounts are consistent with a substantial body of national research. Building Movement Project's Race to Lead series has documented for nearly a decade that 63% of executives of color cite a lack of access to individual donors as a fundraising challenge, compared to 49% of white leaders, and 51% cite limited access to foundations compared to 41% of white leaders (Stanford Social Innovation Review, 2024). Bridgespan and Echoing Green's analysis of early-stage organizations found that revenues of Black-led organizations were on average 24% smaller than their white-led peers, and unrestricted net assets, the flexible reserves organizations can deploy as needed, were 76% smaller (Bridgespan Group, 2022; Fortune, 2026). The Stanford Social Innovation Review's account of the "hollow prize" phenomenon describes the experience of being a BIPOC leader in a formerly white-led organization as akin to receiving a prestigious-looking car only to discover that the engine is failing, the insurance has lapsed, and the previous owner still holds all the relationships with the mechanics (Causer, 2024).

Recent April 2026 research from Candid and the Association of Black Foundation Executives reinforces the urgency. The post-2020 funding increases that many Black-led nonprofits received turned out to be short-lived for larger organizations and largely absent for smaller ones, leaving these groups at greater

disadvantage when federal anti-DEI policies further curtailed equity-focused funding (Candid & ABFE, 2026). The Equitable Giving Lab found that organizations serving Black and African American communities received only 0.61% of total U.S. philanthropic giving in 2022, even as Black Americans represent nearly 15% of the population (Fortune, 2026). The interviewees in this assessment are leading inside that documented funding landscape.

The constant need to prove value to funders and the unrealistic expectations for rapid systemic change are disempowering. Black leaders are often hired to 'clean up' organizations, which can be a lengthy process.

Finding 2: Well-Being Harm Runs Deeper Than Leaders Acknowledge

The most striking finding in the assessment is the disconnect between how leaders describe their well-being on a survey and what they disclose in interview conversation. When asked directly whether their role had harmed their well-being, five of the eight survey respondents who answered said "no," two said "maybe," and one said "unsure." No one said "yes." Yet a follow-up question revealed that half of survey respondents reported at least one role-exacerbated health condition, including high blood pressure, severe anxiety or panic attacks, chronic fatigue, and depression.

Interviewees described health impacts in far more visceral and specific detail: a panic attack, a sleep apnea diagnosis, years of delayed therapy, depression, marital strain, substance abuse in affected relationships, and repeatedly sacrificing personal salary to keep organizations afloat. One leader described falling "out of the jaws of the Kraken and into the bosom of Black women." Another described feeling "overwhelmed and under-equipped." Stress and burnout produced the most detailed material in the entire interview set.

The disconnect between survey self-reports minimizing harm and interview disclosures revealing extensive, specific harm is itself a finding. It suggests normalization of chronic stress among Black nonprofit leaders, a pattern the LIT curriculum must address directly rather than assume leaders will name for themselves.

National data confirm both the prevalence and the racial disparity in nonprofit executive burnout. The Center for Effective Philanthropy's State of Nonprofits 2024 report found that 95% of nonprofit leaders expressed concern about staff burnout, with more than a third reporting that burnout had been a major issue in their organization in the prior year (Center for Effective Philanthropy, 2024). Building Movement Project's analysis of executives in transition found that 41% of BIPOC leaders cite burnout as their top reason for leaving, compared to 31% of white peers, a 10-percentage-point gap that reflects what researchers describe as the compounded weight of racial identity taxation (Candid, 2024; Building Movement Project, 2022). As Nonprofit Quarterly (2021) has noted, this is not a personal failing of leaders but a structural outcome: chronically insufficient funding, hero-leader organizational cultures,

inadequate board support, and the emotional labor of leading during national crises produce what researchers now call the "burnout-reignition cycle."

Finding 3: Leaders Stay for Mission and Community, for Better or Worse

A sense of responsibility to community and organization was the single strongest driver of staying, cited by five of eight interviewees. Leaders described being "called to the work," feeling that "if I don't do it, who else will," and staying because their lived experience connected them to the communities they served. Survey respondents advised incoming Black executives to "find a community and continue to build it" and reminded one another that "we are meant to work in cooperation."

This retention driver, however, is psychologically double-edged. Founder stickiness ("it's my baby; I created this"), timing concerns ("I still have more to do"), and responsibility narratives can keep leaders in roles past the point of sustainability. The interviews show leaders continuing to serve despite burnout, declining health, and inadequate support, held in place by mission commitment rather than by organizational health. Multiple respondents reflected on being "called upon to champion DEI initiatives at the risk of their survival in current political environments," pointing to the racialized weight this commitment carries.

There is a productive tension here: leaders identified structural conditions for staying (resources, role design) while also identifying personal changes they would make (boundaries, self-care, releasing perfectionism). These are two sides of the same dynamic. When organizations are under-resourced, leaders compensate by absorbing stress personally, and the organizational and personal dimensions cannot be addressed in isolation. The literature reinforces this analysis: practitioner-scholar Vu Le has argued that the traditional solo executive director model is, in the words of multiple researchers, impossible to sustain without burning people out, and has called for distributed leadership structures as a structural response rather than a personal one (Nonprofit AF, 2019). Nonprofit Quarterly's 2024 reporting on women of color leaders documented an "upsetting number" of departures driven by hostile board dynamics in just a two-year window, evidence that mission commitment alone cannot protect leaders from structural harm (Nonprofit Quarterly, 2024).

Finding 4: Transition Is Most Successful When Intentional, and Most Is Not

Three interviewees discussed succession planning, but the reality described was largely reactive. One leader's abrupt retirement announcement created an organizational crisis. Another has begun board conversations about succession but lacks resources and external support to advance them. A third emphasized the need to "institutionalize succession at all levels, not just the executive director position." The interview theme of "collapse after leadership leaves" reveals what happens when succession fails: organizational infrastructure proves to be dependent on the leader rather than embedded in systems. National data confirm how widespread this gap is: only 29% of nonprofits had a written succession plan as of 2021, and a 2022 McKinsey study cited in the executive attrition literature

found that 70% of organizational change initiatives fail during leadership transitions (BoardSource & Leading With Intent, 2021; RAIS Journal of Social Sciences, 2024).

Boards emerged as a second, related challenge. Four of eight interviewees raised board dynamics as a core organizational challenge, the second-strongest dose in the organizational challenges theme. Several described feeling unsupported by their boards during their own transitions into the ED role, receiving little guidance or acknowledgment. Survey data reinforced this pattern: while most respondents reported trusting board relationships, satisfaction with board governance activity, fundraising contribution, and role clarity was notably lower. National data point to a measurable racial gap in this dynamic: while 93% of white leaders who succeeded other white leaders reported feeling trusted by their boards, only 77% of executives of color reported the same sense of trust (Chronicle of Philanthropy, 2022).

The survey also reveals how many leaders are already in motion. Of nine respondents, four reported they are "thinking about transitioning," two are "actively working on" their transition, and two are not yet ready, meaning roughly two-thirds of respondents are in some stage of transition readiness. When asked what personal support they would need to transition well, six of nine selected "all of the above" (money, time, and space to dream and think), a clear signal that transition support must be comprehensive rather than narrowly financial or narrowly psychological.

Finding 5: Racial Identity as Strategic Foundation, Not a Burden

The data converge on a clear design directive: the LIT pilot should anchor itself in an explicitly race-conscious, culturally rooted framework, not a race-neutral capacity-building model. Two survey responses named this directly. One respondent advised: "Keep it BLACK. We are worthy of the attention. Do not be afraid." Another recommended adoption of the seven principles of MAAT, an ancient Kemetic ethical framework rooted in truth, justice, balance, order, reciprocity, righteousness, and harmony, as the Institute's foundational philosophy.

The interview data reinforce why this matters. Systemic racism was not a separate topic but the operating environment within which every other challenge occurred: under-resourcing was racialized, isolation was racialized, the pressure to represent entire communities was racialized, and the health toll of absorbing those pressures was racialized. A race-conscious framework is not an additional module but the ground on which every other curriculum element must stand. The adult education literature supports this orientation. Afrocentric pedagogical scholarship from Sheared (1996), Collins (2000), Merriweather Hunn (2004), and Smith (2016) argues that effective learning environments for African American adults must center interdependency, communal accountability, lived experience as a source of knowledge, and, where appropriate, spiritual grounding, moving the facilitator from authority at the center to guide at the margin. Mustafaa (2023) similarly finds that the most effective practitioners of culturally relevant pedagogy approach relationships as communal rather than distant and hierarchical.

Connectedness data reinforces the need for intentional community-building within a culturally grounded frame. On a 0–10 scale measuring how connected respondents feel to other Black leaders in the Bay Area, scores ranged from 0 to 10 with a mean of 6.9. Six of nine respondents identified "a lack of community among Bay Area Black leaders" as a barrier to connection, and several named not knowing where to look to find such community. The Institute's role, then, is not simply to teach transition skills but to build the relational infrastructure within which those skills are practiced and sustained. Research on collectivism as a cultural foundation for African American learning argues that this same-identity, community-rooted infrastructure is precisely what makes deep engagement possible: when African American learners are embedded in communities of shared experience, engagement, sense of belonging, and learning transfer increase substantially (Carson, 2009; Dortch & Chen, 2024).

Finding 6: Advisory Circle Surfaces Productive Design Tensions

The Advisory Circle focus groups validated the LIT pilot's individual-first orientation and surfaced three design tensions the program will need to navigate intentionally. These are presented as productive tensions rather than problems to solve because the Advisory Circle's guidance was that the right answer in each case depends on how the pilot is framed and resourced.

The first tension is cohort composition. Omowale Satterwhite recommended grouping participants by organizational tenure or developmental phase rather than by sector, on the grounds that leaders of comparable-stage organizations face structurally similar challenges regardless of sector. Alicia Dixon raised the related possibility that regionally and topic-specific groupings might generate more practical value than a cross-sector mix, while also noting the distinction between sector-specific and cross-sector cohorts may be more conceptual than practical in execution. The pilot will need to make an explicit choice here and document the rationale for future iterations.

The second tension is depth of personal reflection versus visible community impact. Kimi Watkins-Tartt named this directly, noting the potential critique of "navel-gazing" if cohort time tilts heavily toward internal reflection rather than community-focused work. This is not an argument against the individual-first sequence but a caution that the curriculum must connect personal reflection to community contribution explicitly, and that the program's external messaging should make that connection visible. The Advisory Circle's recommendation was to use storytelling and creative thinking exercises to help leaders envision their future contributions, anchoring reflection in legacy rather than introspection alone.

The third tension is the funder value proposition. Kimi raised a sharp question that the pilot will need to answer for prospective funders: what is the incentive for foundations to support a program that may help leaders leave the very organizations those funders also support? The Advisory Circle's framing, that supporting leader well-being creates organizational stability and improved community outcomes and that the alternative is the crisis-driven transitions documented throughout this report, should be

developed into explicit fundraising language. Alicia emphasized that proposals to funders need explicit language about cross-sector approaches and community outcomes, not just leader development.

The focus groups also generated specific, actionable design recommendations that are reflected in the curriculum pillars below. Omo offered three reflection questions that have anchored his work with executives in transition: life goals, professional impact, and desired legacy; and emphasized engaging boards in transition planning for both planned and emergency scenarios. Both groups underscored the need for psychological safety, executive coaching, especially for founders, and a curriculum that helps long-tenured leaders redefine identity beyond their current role. Mergers and partnerships between Black-led organizations were also raised as a content area worth including.

Recommendations: Five Curriculum Pillars

The following five pillars translate the findings into programmatic components for the LIT pilot. Each pillar is grounded in specific data from the assessment sources and addresses the interlocking structural and personal dimensions of Black nonprofit leadership.

Pillar	Curricular Focus
1. Funding Equity & Sustainability	Addresses the racialized funding landscape directly and builds financial literacy tools and advocacy capacity.
2. Well-Being & Health	Normalizes health monitoring, therapy, and boundary-setting as professional competencies, not personal luxuries.
3. Peer Network & Community Infrastructure	Builds sustained cohort-based relational infrastructure among Black nonprofit leaders.
4. Succession & Transition Planning	Provides concrete tools, board development, and frameworks for assessing when staying serves mission versus perpetuates sacrifice.
5. Culturally Grounded Leadership Philosophy	Anchors the entire curriculum in Afrocentric ethical frameworks as a foundational orientation, not a standalone module.

Pillar 1: Systemic Funding Equity and Organizational Sustainability

Programming should move beyond organizational budgeting basics to address the racialized funding landscape directly, including strategies for securing core operating support, advocacy for philanthropic equity, relationship-building with funding sources, and the financial literacy tools interviewees specifically requested: balance sheets, income statements, and 360-degree organizational assessments. The interview recommendation of at least two years of recurring foundation funding as a baseline may serve as a design reference point for how the Institute frames sustainable organizational design.

Pillar 2: Leader Well-Being and Health

The severity of health impacts documented across both datasets demand structured, ongoing support rather than one-off wellness workshops. Programming should normalize health monitoring, therapy access, and boundary-setting as professional competencies. The disconnect between survey minimization and interview disclosure suggests health literacy and honest self-assessment should be embedded throughout the curriculum rather than confined to a single session. The survey respondent's framing of compensation as "essential, not sacrificial" should serve as a design anchor for this pillar. The Advisory Circle reinforced that this work requires deliberate construction of psychological safety, a space for vulnerability that long-tenured leaders rarely encounter, and recommended pairing reflection

with executive coaching, particularly for founders whose identities are most tightly bound to their organizations.

Pillar 3: Peer Network and Community Infrastructure

This was the single most consistent theme across all data sources. Leaders advised newcomers to build community, rejected scarcity-driven competition, described the Executive Director role as isolating, and framed the Institute's primary value in collective terms, best captured by a respondent who wrote: "If you want to go fast, go alone. If you want to go far, go together." The curriculum should build sustained peer cohort models that create ongoing relational infrastructure among Black nonprofit leaders, extending well beyond the six-month formal program. The adult learning research provides specific design guidance for this work: peer mentoring among African American leaders is most effective when it creates explicit space for "identity work," the integration of racial and professional identity that hierarchical mentoring relationships cannot easily support (Thomas, Wise, & Bell, 2021). The same-identity cohort structure the LIT pilot is adopting is itself research-supported as a vehicle for the unguarded candor, mutual recognition, and co-construction of knowledge that integrated learning environments rarely make possible (Dortch & Chen, 2024).

Pillar 4: Succession Planning and Organizational Transition

Programming should provide concrete succession planning tools, external facilitation, and coaching for leaders at various stages of transition readiness. Drawing on Omowale Satterwhite's work supporting founders through transition, the curriculum should anchor personal reflection in three core questions: life goals, professional impact, and desired legacy, which surface the personal clarity required before organizational planning can succeed. Board development must be a non-negotiable component of this pillar, given the interview evidence that boards are frequently unprepared for leadership transitions and the Advisory Circle's emphasis on engaging boards in transition planning for both planned and emergency scenarios. The Institute should also address the psychological dimension of transition, particularly founder stickiness and responsibility narratives that keep leaders in roles past sustainability, with honest frameworks for assessing when staying serves the mission and when it perpetuates a sacrificial dynamic. Storytelling and creative thinking exercises, recommended by the Advisory Circle, can help leaders envision future contributions to the community and redefine identity beyond their current role. Mergers and partnerships between Black-led organizations should be included as a content area for leaders considering organizational consolidation as a transition pathway.

Pillar 5: Culturally Grounded Leadership Philosophy

The Institute should anchor its design in Afrocentric ethical and leadership frameworks such as the MAAT principles recommended by a respondent. This is responsive both to the explicit survey recommendations and to the interview context showing that systemic racism is the operating environment for every other challenge. Racial identity should be positioned as a source of strength and strategic clarity throughout the curriculum. This pillar is not a standalone module but a foundational

orientation that informs the design, language, facilitation style, and philosophical grounding of all other pillars. The adult learning literature reinforces this design choice: culturally sustaining pedagogy argues that effective programs for African American adults must not only affirm participants' existing cultural assets but should actively support the intergenerational transmission of leadership wisdom, creating conditions for experienced leaders to document and share the knowledge they have accumulated over decades of service (Paris & Alim, 2017; Hammond, 2015).

A Note on Cohort Design

Across all five pillars, the Advisory Circle consistently recommended building cohorts grouped by organizational tenure or developmental phase rather than by sector; the rationale is that leaders of comparably aged organizations face structurally similar challenges regardless of the sector they serve. The pilot will adopt this guidance for the inaugural cohort while remaining open to topic-specific or regionally focused cohorts in future iterations. Whatever grouping logic is chosen, the cohort must be small enough and sustained long enough to generate the psychological safety the Advisory Circle identified as essential to the program's depth.

Implications and Next Steps

Implications for the Field

Four findings from this assessment carry implications beyond the LIT pilot itself. First, the disconnect between survey self-reports and interview disclosures of health harm suggests that sector-wide efforts to measure Black executive well-being through survey instruments alone are likely to underestimate the severity of the problem. Second, the consistent framing of under-resourcing as racialized and structural, rather than as individual compensation concerns, argues for philanthropic conversations about equity in core operating support rather than focused solely on pipeline development or individual leadership training. Third, the evidence that mission commitment and founder identity can hold leaders in roles past sustainability suggests that *the field needs richer, more honest frameworks for discerning when staying serves mission and when it perpetuates sacrifice*. Fourth, the Advisory Circle's identification of an emerging-leaders pipeline gap, particularly for organizations led by long-tenured founders, suggests that *transition support for current leaders and pipeline development for future leaders are inseparable problems and should be funded together rather than sequentially*.

A Note on the Funder Value Proposition

The Advisory Circle identified a question this report should answer directly for prospective funders: ***What is the incentive for foundations to invest in a program that may help leaders leave the very organizations those funders also support?*** *The case is this: the alternative to LIT is the crisis-driven transitions documented throughout this report, including abrupt exits, organizational collapse, and the loss of community-rooted infrastructure that takes decades to rebuild. Investing in well-resourced, intentional transitions protects funders' existing investments in Black-led organizations, supports the pipeline of leaders those organizations will need, and produces healthier organizational outcomes than the status quo. Framed this way, LIT is not a program that helps leaders leave; it is a program that prevents the organizational damage that unplanned departures cause.*

Pilot Implementation

This needs assessment concludes Phase 2 of the LIT project timeline. The next phases will operationalize the five curriculum pillars in partnership with the Advisory Circle, recruit the inaugural six- to ten-participant cohort, and implement the pilot program with built-in documentation and evaluation. *Particular attention will be paid to whether the individual-first sequence, personal reflection before organizational planning, produces the transition readiness outcomes the model predicts and whether peer cohort infrastructure sustains engagement beyond the formal program period.*

Evaluation and Future Research

The pilot evaluation will capture both individual-level outcomes (transition readiness, well-being indicators, clarity about post-transition direction) and organizational-level outcomes (succession planning progress, board readiness, institutional knowledge transfer). Anonymized learnings will be documented and shared with the field to inform replication. Future needs assessments should extend formative data collection to Latino/a/x, Asian, Indigenous, and other leaders of color whose experiences were outside the scope of this initial assessment, but who fall within the broader population the Institute ultimately aims to serve.

References

References cited in this report are listed below in APA format. Full source documentation is available in the two literature reviews prepared for the LIT pilot: Leaders in Transition: A Literature Review on Senior Nonprofit Executives of Color (April 2026) and Best Practices for Facilitating Adult African American Learning (2025 to 2026).

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