



THE FUNDERS
COLLABORATIVE ON
YOUTH ORGANIZING'S

ROOTS INITIATIVE TOOLKIT

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PREFACE

From 2003-2006, the Funders Collaborative on Youth Organizing (FCYO) coordinated the Roots Initiative, a grant initiative involving 10 dynamic youth organizing (YO) groups committed to exploring the “best practices” that contribute to successful organizational development nationally. Although YO was a relatively nascent sector within the social justice world, YO organizations were nevertheless making a powerful impact in their communities by the late 1990s and early 2000s. At the same time, there was a dearth of documented information on the practices and methodologies groups were enlisting (or, at times, creating) in their efforts to build effective organizations and campaigns.

By agreeing to participate in the Roots Initiative, the 10 chosen groups committed to collectively develop new social justice knowledge, particularly as it related to the role of youth and youth organizations in the movement. In this sense, the Roots Initiative groups were more than just a cohort receiving grants from the FCYO; they were a fellowship of “organic intellectuals,” on-the-ground leaders who, in addition to being engaged in daily struggle, were actively shaping concepts and ideas for the broader social justice community.

Yet, they were hesitant to call themselves “experts,” and they were often ambivalent about being bearers of best practices. This is because the Roots Initiative groups understood that while they were in a position to share ideas and successful organizational practices, they were also still figuring things out. They understood that past organizational successes were only as meaningful as they were *sustainable*. And no group was exempt from the ongoing challenges of staff development, fundraising, organizational structure and strategic planning. Before long, the spirit of the Roots Initiative became less about setting standards and more about collectively developing lessons on sustainability that could be shared with the YO community and beyond. *The Funders Collaborative on Youth Organizing’s Roots Initiative Toolkit* is a compilation of those lessons. It provides narrative reflections on three thematic areas: Leadership Transitions, Negotiating Relationships with Parent Organizations, and Bridging the Youth Organizing–Youth Development Divide. Throughout, the overarching theme is sustainability: How do groups prepare themselves for the long haul?

There are many groups and individuals to thank for making the Roots Initiative a success. First, are the Roots Initiative groups themselves: Boston Area Youth Organizing Project, Californians for Justice, Carolina Alliance for Fair Employment, Inner City Struggle, Kids First, One Nation Enlightened, Philadelphia Student Union, Generation Y of the Southwest Youth Collaborative, Sistas and Brothas United, and Sisters in Action for Power.

The Roots Initiative emerged from discussion among the FCYO Board of Directors. Since the organization’s inception in 2000, the board has continuously worked to fill knowledge gaps in the field of YO, and the Roots Initiative represents one of its major knowledge-development efforts to date. The FCYO Board is comprised of representatives of the following foundations and community-based organizations: Mary Reynolds Babcock Foundation, Cricket Island Foundation, Ford Foundation, Edward E. Hazen Foundation, Hill-Snowden Foundation, Inner City Struggle, Merck Family Fund, Rockefeller Brothers Fund, Movement Strategy Center, Native Movement, One Nation Enlightened, Open Society Institute, Overbrook Foundation, Philadelphia Student Union, School of Unity and Liberation, Surdna Foundation, Third Wave Foundation, Urban Underground, and Youth Ministries for Peace and Justice.

The following foundations provided generous grants to the FCYO that directly supported the work of the Roots Initiative: Common Stream Foundation, Edward E. Hazen Foundation, Evelyn G. Walter Haas Jr. Foundation and the Charles Stewart Mott Foundation. The ongoing support of each of these foundations to the development of the YO field is invaluable.

A major component of the Roots Initiative involved each of the 10 groups working closely with a technical assistance provider to identify and address its most pressing organizational development needs. Many thanks to the following individuals for their work as technical assistance providers: Daniel Hosang, Harmony Goldberg, Ditra Edwards, Najma Nazyat and Cameron Levin. Several of the tools that appear in this compilation are based on the ideas and templates that originated with members of this team.

In an effort to create a broader dialogue on sustainable practices, as well as to further draw out the lessons for each of the three thematic areas, several non-Roots Initiative groups were asked to participate in focus-group discussions and one-on-one interviews. The following individuals and groups generously offered their reflections on the Roots Initiative themes: Mei-ying Ho of School of Unity and Liberation, N’Tanya Lee of Coleman Advocates for Children and Youth, Jesse Ehrensaft-Hawley (formerly of FIERCE) and Claire Tran of Asian Pacific Islander Youth Promoting Advocacy and Leadership.

Finally, the staff of the FCYO functioned as the backbone to the Roots Initiative. Collectively, the staff offered an abundance of support in areas ranging from coordinating group gatherings, to fundraising, to research and providing feedback on drafts. A warmhearted thanks goes to the following FCYO staff members, past and present: Nicole Burrowes, Lisa Garrett, Telesh Lopez, Vera Miao, Patricia Soung and Alea Woodlee.

The principle writers of *The Funders Collaborative on Youth Organizing’s Roots Initiative Toolkit* are Eric Tang and Harmony Goldberg. Together, we attempt to synthesize the lessons learned across the three years of the Roots Initiative, as well as to compile, edit and create various tools and curricula that best supported Roots Initiative groups (and groups beyond the Initiative) as they navigated different organizational development challenges. We hope that our narrative and curricula capture the spirit and intellect of all those who contributed to this important project.

Eric Tang, Senior Field Associate of the Funders Collaborative on Youth Organizing
New York City, July 2007

WHAT IS THE FUNDERS COLLABORATIVE ON YOUTH ORGANIZING (FCYO)? WHY THE EMPHASIS ON SUSTAINABILITY?

The Funders Collaborative on Youth Organizing (FCYO) was formally launched in 2000, following nearly three years of joint discussion and strategizing between front-line YO practitioners and some of the leading social justice foundations in the country, including the Ford Foundation, Edward W. Hazen Foundation, Jewish Fund for Justice, Merck Family Fund, Open Society Institute, Rockefeller Brothers Fund and the Surdna Foundation. Witnessing the groundswell of activity and interest in YO strategies across the country during the mid-1990s, program officers from these institutions were convinced that YO was both an emerging and a dynamic field that simultaneously met the goals of social justice organizing, youth development and leadership expansion. They also realized that it was an under-resourced and relatively marginalized field within the broader social justice landscape. Indeed, beyond the funding provided by these aforementioned foundations, few philanthropic institutions were fully sold on YO as a strategy by the late 1990s. So in 2000, the FCYO emerged, with program officers and practitioners taking seats on its board of directors.

From the outset, the core goals of the FCYO were to:

- Increase the level of funding directed towards youth organizing groups;
- Support youth organizing groups to develop stable and sustainable organizations; and
- Increase the awareness and understanding of youth organizing among funders and community organizations.

By 2002, the FCYO had brought several new foundation partners into the Collaborative, and it was now ready to turn its sights on the second of its three goals—supporting YO groups to develop stable and sustainable organizations. The Roots Initiative was conceived by board members who were interested in developing a program that could simultaneously provide grant support to YO groups, create individual and cross-group learning opportunities, and perhaps most importantly, track and document the work of groups that were seriously engaging the sustainability question. The end goal, reflected in this *Roots Initiative Toolkit*, is to share such learning across the field, among practitioners, funders, and social justice allies and supporters alike.

Introduction: ON THE SUSTAINABILITY QUESTION

“It’s not adultism. It’s just plain old common sense,” said the board member. “If we leave the organization in the hands of the young people, then we’re setting them up for huge failure,” he added. A veteran community organizer in his early forties spoke these words during the time he was serving as board chair of a well-regarded youth organizing (YO) group. For years, the group had effectively won key organizing victories, and it was often looked to as a model among its peers in the field of YO. Yet, almost seven years into its lifespan, the organization reached an impasse, one that is actually quite common among YO groups. It was stuck on the question of what it *truly* meant for an organization to be “youth-led”—a popular phrase that certainly captures the self-determinist values of YO, yet remains a somewhat vague concept and practice in the daily life of youth organizing groups.

This particular group was split on whether or not its youth leaders—generally those under the age of 25 who had served the organization for at least two years, advancing through the ranks of its leadership development program—should be entrusted with “primary” decision-making power in the organization. Should there be a leadership transition where the key organizational decision makers were the youth leaders themselves? For some, this was the only sensible move to make as the organization continued to expand its leadership core. Just as the external mission of the organization expressed a desire to have young leaders assert greater self-determination over the external forces in society, so the internal life of the organization should promote policies and practices to make such self-determination a lived reality. This is not to say that the youth leaders previously held no decision-making power in the organization; youth leaders actively participated in determining the overall goals and strategic plan of their organization. But, it was true enough that the day-to-day decision-making power rested largely in the hands of the adult staff and board members. The adults determined things such as who received stipends (and who didn’t), how to evaluate and hold youth leaders accountable, how and where to raise resources, and so on. In effect, the adult leaders wielded what could be considered “administrative control” over the organization, and in the eyes of many youth leaders this was a domain wherein real power resided.

For those advocating the transition of power to youth leaders, much more was at stake than being politically correct (or “contradiction-free”) on the youth question. “It’s about the overall, long-term sustainability of the organization,” said one youth leader. “If the youth leaders don’t feel empowered in their own organization, how can they feel powerful enough to take on the outside world?” He added, “It’s going to be hard to keep the morale going, to keep young people coming [to the organization] day after day, week after week, if they don’t feel that sense of decision-making power.”

The board saw it differently. According to the board chair, to reduce the question of organizational power to a “zero-sum game” between those who have it and those who do not, was both narrow-minded and potentially dangerous. “Who’s to say that the group [of youth leaders] that takes power won’t replicate the same abuses that they accuse us of?” he asked. The consensus among the board was that within every organization there are distinct roles to be played by distinct contributors. Since adults clearly had the experience, the technical know-how and leadership skills to provide strong administration for the organization, they should readily assume power over the internal “controls.” At the same time, the adults were mindful that the youth leaders possessed an alternative form of political power, one that they, perhaps, underestimated. Youth were the on-the-ground leaders, the ones who did the work of building relationships with the community base. They controlled what could be considered the political “mood” and popular opinion among the youth membership—a point underscored by the distress some board members and some adult staff experienced in the face of the growing number youth leaders siding against them.

But despite the growing pressure, the board and adult staff members held their ground, believing it “irresponsible” to adopt a proposal that would place primary decision-making power in the hands of the youth leaders. “You can’t just flip roles around overnight, and expect everything to be fine,” said another board member. “I think they [youth leaders] have every right to want to evolve into the executive positions of the organization, but that transition takes time—and training. We have to think about the *sustainability* of the organization,” she stressed. “This organization couldn’t last a year if we decided to flip the script and hand over decision-making power to youth overnight.”

It was an interesting conundrum, to say the least. The organization was split into two camps, each believing itself to be keepers of the organization’s longer-term sustainability. And, it is worth mentioning here, that their respective definitions of sustainability did not diverge significantly. Both understood the concept to mean the steady expansion of successful organizational programs and resources, as well as the growth (quantitative and qualitative) of the organization’s base of support. Still, the two camps were clearly working at cross strategies. An initial read of the situation would suggest that both camps were at least partially correct. Those interested in seeing youth leaders assume primary decision-making power were right to assert that the sustainability of an organization has as much to do with staying true to the political mission and values as it does with raising resources or running an administratively tight ship. So too, the board members and adult staff were convincing as they cautioned against an “essentialist” view of youth leadership, one that overlooked distinct leadership roles and the necessary training and development needed to fill those roles.

Both parties eventually agreed to a multi-phase restructuring process that would last for more than a year. This process included revisiting the values and mission of the organization, evaluating the effectiveness of current structures and decision-making processes in relation to the revised values and mission, and ultimately redesigning the structure of the organization to allow for greater decision-making roles among youth leaders without constricting the important and distinct contributions of adult staff and board members.

Though this process was often contentious, it revealed to both sides that the issues at hand were less about interpersonal conflict or even ideological disagreement, but rather a part of a broader inevitability for organizations: growth and sustainability. As the organization expanded and evolved—no doubt a reflection of its successes—the factors contributing to its ongoing sustainability were also shifting, evolving. In this phase, it therefore needed to take on the challenge of developing new processes, structures and programmatic components to address the broad spectrum of sustainability concerns.

How could the organization internally promote a sense of “youth power” that truly reflected its mission and values without tokenizing or superficially displaying youth leadership? At the same time, how could it be deliberate, if not outright *rigorous*, in its leadership development process, understanding that not all youth members will ascend to organizational leadership roles (nor do all aspire to), and that those who do advance will require considerable support, mentorship and training?

It was precisely this set of sustainability questions and challenges that lie at the heart of the Funders Collaborative on Youth Organizing’s Roots Initiative.

The Roots Initiative: OVERVIEW AND ANALYSIS

A project of the Funders Collaborative on Youth Organizing (FCYO), the Roots Initiative was launched with the goal of supporting and learning from youth organizing (YO) groups that were actively addressing the sustainability question. The Initiative set out to discover what groups with solid track records in the field were doing to ensure the continued growth and long-term viability of their programs. And though it seemed, at first glance, that growth and viability had everything to do with the elements of successful campaign organizing (having a solid strategy, ample resources and winnable demands), those paying close enough attention to the field realized that external campaign wins provided only part of the sustainability picture. Indeed, it was easy to surmise that an organization’s healthy internal functioning was at the root of sustainability.

From August 2003 through August 2006, the Roots Initiative involved 10 youth organizing groups from around the country that were considered “established” organizations in the field—a descriptive that reflects not only the organization’s age, but also its recent achievements in the areas of base- and membership-building, campaign organizing, leadership development and political education. The 10 groups were chosen from a pool of approximately 30 organizations invited to apply to the Initiative.

THE ROOTS INTIATIVE GROUPS (2003-2006)

- Boston Youth Organizing Project (BYOP) - Boston, Massachusetts
- Californians for Justice (CFJ) - Oakland, Long Beach and Fresno, California
- Carolina Alliance for Fair Employment (CAFE) - Greenville, South Carolina
- Generation Y of the Southwest Youth Collaborative (Gen-Y) - Chicago, Illinois
- Inner City Struggle (ICS) - East Los Angeles, California
- Kids First (KF) - Oakland, California
- Philadelphia Student Union (PSU) - Philadelphia, Pennsylvania
- One Nation Enlightened (ONE) - Denver, Colorado
- Sistas and Brothas United (SBU) - Bronx, New York
- Sisters in Action for Power (SIAP) - Portland, Oregon

GRANT SUPPORT, NETWORKING OPPORTUNITIES AND TECHNICAL ASSISTANCE

As a member of the Roots Initiative, each of the above groups received a grant of \$35,000 per year over the course of three years. The grant was designated for general operating expenses for each organization.

The 10 groups were also provided ample networking opportunities. In addition to annual gatherings that brought together all the groups, each group was provided a travel subsidy of \$3,000 to cover the costs of an onsite visit to another Roots Initiative group. The annual gatherings and cross-organizational visits proved some of the most dynamic components of the Initiative, providing groups rare time and space to share organizational processes and structures with one another, as well as to explore the broader questions, challenges and opportunities within the YO field.

Finally, each group was provided a technical assistance consultant who worked with organizational members (optimally, with a team that included board, staff and youth leaders), assisting them in creating or advancing a particular “organizational development” need. This distinct need, which was determined through the use of an “Organizational Self-Assessment” tool, ranged from strategic planning design and facilitation, to developing a plan for grassroots fundraising, to designing a transition

plan for exiting and incoming leadership, to creating a youth development component that would best complement the organizing work.

ANALYSIS OF THE ROOTS INITIATIVE: SUSTAINABILITY AS THE OVERARCHING THEME

During the Roots Initiative gatherings, discussions invariably returned to the question of organizational and field-wide *sustainability*. While some of this discussion certainly equated sustainability with fundraising, much of it was also focused on the broader implications of the sustainability concept. This included issues such as:

- How to build the capacity to train/develop new and transitioning leadership while maintaining the daily organizing work;
- How to develop multi-year workplans that reflect intermediate and long-term organizing and resource development strategies;
- How to continue to engage and politically develop youth organizers who have gone through the basic “101” training curriculum;
- How to negotiate a positive relationship with a “parent organization” that houses the youth organizing project (and, related to this, how to leave a parent organization);
- How to develop a meaningful and deliberate youth development component while still maintaining youth organizing as the core method and program.

Work on these sustainability topics also accounted for much of the Roots Initiative groups’ organizational development work with the technical assistance consultant.

At the conclusion of the Roots Initiative, three of the above topics emerged as the most salient:

1. Leadership Transitions
2. Negotiating Relationships with Parent Organizations
3. Bridging the Youth Development-Youth Organizing Divide

These three themes, which will be summarized below and elaborated upon in the chapters that follow, were chosen because they arose as recurring concerns for groups across the Initiative. Moreover, they reflect organizational development trends throughout the broader YO field. As such, YO staff and leaders outside of the Initiative played a crucial role in informing the themes and recommendations of the *Roots Initiative Toolkit* through their participation in focus groups and one-on-one interviews.

THE THREE SUSTAINABILITY TOPICS : AN OVERVIEW

1. LEADERSHIP TRANSITIONS

More than half of the Roots Initiative groups were undergoing a leadership transition at the highest levels of the organization (i.e., at the executive director and/or associate director rank). These groups found that replacing directors would not be as simple as placing an open call for resumes, since many desired to move their youth leaders into staff positions—a move that both reflected the organization’s mission and values, and its confidence in its leadership development “pipeline.” But, even those that did not choose to advance a youth leader into an executive position found it unrealistic to seamlessly replace a founding director with a completely new incoming director. Instead, these groups relied on an intensive period wherein the incoming director “shadowed” the outgoing.

2. NEGOTIATING RELATIONSHIPS WITH PARENT ORGANIZATIONS

At least three of the Roots Initiative groups faced challenges negotiating their relationships with parent organizations, the larger nonprofit community groups in which they were housed. Many YO groups were originally founded as either youth components to larger, mostly adult-oriented community organizing groups, or as the organizing components to traditional youth services or youth development organizations. While the majority of these YO groups maintained positive and mutually-beneficial relationships to their parent organizations, some experienced sharp political and cultural divergences. YO programs within adult organizing spaces may feel misunderstood by (and subordinate to) the adults. Meanwhile, YO programs within a youth development/services organization may feel politically estranged by those who don’t quite “get” the importance of organizing in the context of advocacy and direct service. During the Roots Initiative, two groups decided to separate from their parent organizations. Through the process, each learned a great deal about negotiating a separation, reconstituting the leadership and base as an independent entity, and developing fiscal and legal governance processes and structures.

3. BRIDGING THE YOUTH DEVELOPMENT-YOUTH ORGANIZING DIVIDE

Several Roots Initiative groups (particularly those with active and vocal youth leadership) expressed that the campaign organizing work alone often fell short of providing for the broader development needs of youth members: how to balance academic, economic and family responsibilities/pressures; how to begin planning for the longer term, e.g., college and employment; how to locate one’s place in the social justice movement; how to lead a holistic and healthy life, particularly in marginalized communities; how to understand, articulate and live the multiple identities that intersect around the axis of youth (e.g., race, gender, class, sexuality, immigration status, and so forth). There was strong consensus among several Roots Initiative groups that consistent and intensive youth development components needed to be integrated into the organization, complementing the organizing work. There was also recognition of the challenges faced by youth organizing groups attempting to integrate youth development. Fundraising presents the main challenge, as traditional youth development funders are hesitant to fund a youth organizing model of youth development—a point reflected by the limited number of requests for proposals (RFPs) that call for an integration of youth organizing and youth development.

SUMMARY RECOMMENDATIONS

The following recommendations result from discussions, which took place over the course of two Roots Initiative gatherings (December 2005 and July 2006), a focus group on the topic of leadership transitions with Roots Initiative groups along with non-Initiative groups who recently experienced transitions, and a series of interviews with representatives of youth organizing groups that have either experienced organizational separations or have maintained solid working relationships with a parent organization.

LEADERSHIP TRANSITIONS

- Develop a “shadowing plan” for executive director transitions. Ideally, transition plans involve leaders or an in-house staff person formerly of the youth base. The length of the shadowing period can be set according to the specific needs of the incoming director and the organization. Shadowing periods have ranged between six months and two years for different organizations
- Craft a director “leadership training program” designed to meet the needs and specificity of youth organizing. This training can be drawn upon for new directors as well as those who are in the development phase (i.e., “shadowing” an outgoing director). The training program can cover topics ranging from the nuts and bolts of 501(c)(3) management, to building political and personal relationships, to identifying and refining particular leadership styles. There already exist several leadership development programs devoted to similar objectives (for example, The Social Justice Leadership Collaborative). We recommend one that is similar in scope, yet focuses on the particular challenges that arise in the field of YO.
- Understand that leadership transitions are not just transitions of individuals; they are transitions for entire organizations. Successful transition plans account for significant organizational development work, and involve leadership development at all levels of the organization.
- Create a thorough plan for leadership transition that focus on both the transfer of skills and the transfer of vision, principles and politics. Because youth organizing is such a vision-driven field, leadership transitions must integrate both the political and the practical.
- Consider the creation of “director’s circles,” a collective or two or more directors, as opposed to a single director. This structure can help achieve a balance between youth and adult staff.
- Develop a transition diagnosis and checklist, a tool designed to assess which areas of transition need prioritizing in order to implement healthy and sustainable transitions.
- Encourage philanthropic institutions to support the specific work of internal leadership transitions.

NEGOTIATING RELATIONSHIPS WITH PARENT ORGANIZATIONS

- It is important to cultivate political and personal relationship between youth organizations and parent organizations. The relationships between YO groups and parent organizations are not just technical or administrative; they are also deeply political and personal relationships. Youth organizations that have maintained the closest and healthiest relationships with their parent organizations have an alignment of analysis, mission and program, along with a high degree of communication and interpersonal trust. These unities help groups to negotiate differences over administrative and financial issues.
- Instead of understanding the relationship as uni-directional support from the parent organization to the youth organizations, youth groups and parent organizations need to be clear about the ways they support and influence each

other. Youth organizations have helped adult-based community organizations in many significant ways by: encouraging advocacy-based organizations to adopt organizing work, promoting a deeper power analysis of community issues and encouraging adult organizations to integrate political education into their organizing work. These contributions are significant and should be recognized by the organizations involved as well as by the funding community.

- Organizations should have clear written agreements about their financial management and fees. Money matters are a major source of tension between youth organizations and parent organizations. These tensions are most likely to emerge when organizations do not have clear, written agreements about fiscal management fees or division of resources from collaboratively raised monies.
- Youth organizations should seek a written Memorandum of Understanding (MOU) outlining their relationship with their parent organization or fiscal sponsor. These memoranda should include the financial matters discussed in the previous point, communication channels, division of authority and processes for the potential termination of the relationship. Planning for worst-case scenarios can help organizations to prevent those scenarios from developing.
- Parent organizations that are self-reflective about the power dynamics inherent in their relationship with youth organizers are better able to intentionally and respectfully avoid abuses of power. For parent organizations, this includes awareness of overstepping organizational authority, respecting the differences in organizing models between adult organizing and youth organizing, transparency in fundraising and financial management, and direct respectful communication.
- Youth organizational autonomy is only one of several viable models for YO. Youth organizations should assess the concrete costs and benefits of their relationships with their parent organizations, including the potentially significant political impact they can have by maintaining a close organizational affiliation with a parent organization.
- Youth organizations going through transitions to become independent organizations need support from YO funders, including both increased general support dollars and funds for technical assistance to help groups complete a healthy transition. This is a crucial period for developing organizational stability, and the investment is likely to pay off in their future work.

BRIDGING THE YOUTH DEVELOPMENT/YOUTH ORGANIZING DIVIDE

- The field of youth organizing should temper any exaggerated claims to the sharp differences between youth organizing and youth development (save for the rare cases in which youth development programs are law-enforcement driven).
- Youth organizing groups should dedicate resources to the creation and management of youth development programming. Such programming can range from after-school tutoring and academic skills development, to college prep support, to programs aimed at developing members’ skills in the arts and multi-media technology, to programs aimed at enhancing the holistic health of youth members (mind, body, spirit).
- Youth development components that are in sync with the vision, mission and wherever possible, the political organizing work of the group benefit both young people and the organization. These components should also be viewed as an entry point or “gateway” into other aspects of the organization.
- Youth development components should be realistic in goals and scope. The goal is not to turn the YO group into a large scale service organization with “clients.” Rather, the goal is to provide a specific, meaningful, but above all else, manageable development component “in house.”
- YO groups with youth development components benefit from cultivating a strong base of referrals for youth members across the following services: public health, mental health, domestic violence, child sexual abuse, homelessness prevention and housing eviction prevention. The optimal situation involves developing a likeminded partnership with local professionals in these fields.
- As youth leaders advance in their skills, expand their political analysis and develop their overall capacity as leaders, the YO group should refrain from seeing itself as one-stop shop for all their political development needs. Evolving youth

leaders should be encouraged to explore other social justice settings and opportunities. Developing an “Individual Movement Action Plan,” a life-planning tool for youth organizers developed by the Movement Strategy Center (see Resources page), for each member is absolutely critical.

- Youth organizing funders should support aspects of YO work that incorporate youth development! However, they should maintain a critical eye toward the degree to which the youth development program advances the political goals of organizing and encourage balance so it does not eclipse the organizing component.

ADDITIONAL ANALYSIS OF ROOTS GROUPS FROM SELF-ASSESSMENT SURVEYS

At the beginning of the Roots Initiative’s second year, each of the 10 groups completed in a Self-Assessment Survey aimed at helping them identify key organizational development strengths and weaknesses. The results of this self-assessment informed their Technical Assistance Workplans.

Below is a summary analysis of the self-assessments:

Overall, Roots Initiative groups are notable for the consistency in which they describe their organizations as mission driven; continually self-reflective and self-improving; possessing strong communication channels and clearly articulated roles among staff, managers and non-managers; translating values into practice; committed to staff development throughout the organization; consensus-based; and generally well-managed and healthy in terms of organizational culture.

At the same time, leaders of these organizations are relatively young in age and in years of experience with core management responsibilities. They are heavily dependent on foundation funding, while still in the start-up phases of developing multi-year fundraising plans, cultivating individual donors and exploring non-foundation resources, such as investments and income-generating enterprises. Despite their strong reliance on foundation funding, all groups experience challenges when it comes to finding an appropriate philanthropic fit or niche. Community organizing/social justice funders view their work as a mere corollary to adult organizing. Meanwhile, progressive youth development funders view youth organizing as “too political.” As such, groups often have to cobble together small, one-time grants from various foundations. With regard to personnel and leadership, all have experienced significant transitions either in core youth leaders, an executive director or lead organizers, and/or funding.

IN THE PAST TWO YEARS (2004 - 2006)

- 100% of respondents experienced changes in funders’ priorities or cycling out of funding
- 75% experienced reduction in funding due to foundation cutbacks
- 75% experienced transitions in executive director or lead organizer positions
- 100% experienced transitions in core youth leaders

THE MOST PRIORITIZED NEEDS (IN DESCENDING ORDER)

- Organizational design/restructuring
- Planning
- Leadership development/coaching
- Fundraising
- Evaluation

Nearly sixty-three percent of respondents identified organizational development issues, as opposed to organizing issues, as the key concerns facing their organization.

BACKGROUND ON ORGANIZATIONAL RESPONDENTS

- 75% of those who filled out the self-assessment tool are age 34 or under
- 75% have 6 or more years of experience in community-based organizations focusing on social justice
- 87.5% have 3-10 years experience in youth development and youth-serving organizations
- 50% have 3-5 years experience in human resource management and supervision
- 87.5% have 5 years or less experience in fiscal management
- Most respondents have 3-10 years experience in the majority of organizing areas
- None had more than 10 years experience in fiscal management, board development or planning
- 1 respondent had more than 10 years experience in campaign planning and political education

SNAPSHOT OF ORGANIZATIONS

- Roots Initiative groups are unanimous in their belief that “**from some to great extent**”
 - The mission is understood by all stakeholders
 - There are clearly defined organizational and programmatic goals
 - These goals are clearly understood by all stakeholders
- 87.5% of respondents have defined or revisited its mission in the past 3 years

ROLE OF BOARD OF DIRECTORS OVER THE PAST THREE YEARS

- 62.5% of respondents changed the way the board is organized and operates
- 62.5% could clearly define the work of the board
- 62.5% recently evaluated the board’s effectiveness
- On average, respondents ranked the role of the board, in order of importance (#1 being the most important) as follows:
 - 1) Community representatives
 - 2) Fundraisers, overall or for individual donors in particular
 - 3) Active strategic planning participants
 - 4) Providing fiscal oversight and management
- 50% of respondents believe there is a productive working relationship between the executive director and the board

STATE OF FUNDRAISING AND FUND DEVELOPMENT

- 62.5% of respondents collect membership dues
- 50% consider membership dues critical to the organization’s ongoing and future success
- 87.5% have a fundraising plan for the current year
- 1 respondent has a multi-year fundraising plan
- 87.5% feel that their board of directors make “**no to some**” contribution to fundraising
- 37.5% believe that they have from a **strong to great extent**” tracked and actively cultivated their individual donors
- No respondents have researched strategies to build long-term assets (i.e., real estate, endowments, etc.) or implemented income-generating strategies.

ROOTS INITIATIVE
MAJOR ACCOMPLISHMENTS

Over the course of three years, the Roots Initiative met several key objectives through its direct technical assistance support to youth organizing groups, grantmaking efforts, networking and learning opportunities, and periodic national gatherings of Roots Initiative groups. Below is a summary highlighting accomplishments of the Roots Initiative:

- Stabilized two separate groups through transitions from their parent organizations to independent status under new fiscal sponsors. Provided start-up related support, including development of operational plans, formation and training of the board of directors, and clarified new organizational structures.
- Developed a new leadership structure and process for one Roots Initiative group experiencing the transition of its founding director, and increased authentic youth decision making throughout the organization. The organization successfully hired for the new leadership structure.
- Provided research and support in youth development theory and practice to help one Roots Initiative group launch a middle school program.
- Began a learning circle in year three focused on linking grassroots organizing work to policy impact, primarily in the education organizing arena. The first call included the NYU Institute for Education and Social Policy, and reviewed the local impacts of No Child Left Behind, its historical roots and its future developments.
- Implemented individualized technical assistance workplans, which included: strategic and operational planning; fundraising that specifically explored grassroots fundraising strategies and donor cultivation; developing more intentional, formal staff management, evaluation and development processes with an eye toward supporting the growth of emerging organizers; curriculum development in order to formalize, document and centralize training institutes for new and advanced leaders; exploring youth development theory and practice; and planning for deliberate integration of youth development principles throughout groups’ organizing work.
- Developed a holistic, organizational self-assessment tool for youth organizing groups.
- Distilled the three core themes that frame the Initiative: *Leadership Transitions; Negotiating Relationships with Parent Organizations; and Bridging the Youth Development-Youth Organizing Divide.*
- Held four national gatherings of Roots Initiative members (Fall 2003, Fall 2004, Winter 2005, Summer 2006).
- Created multiple networking opportunities for each group through formal organizational exchanges.
- Held four teleconference calls to explore policy issues related to youth organizing (such as, No Child Left Behind).



Chapter 1

LEADERSHIP TRANSITIONS

REFLECTIONS ON LEADERSHIP TRANSITIONS

Youth organizing is still a relatively young field; its longest established organizations are only slightly more than a decade old, and its veteran leaders have less than 10 years of experience under their belts. In the last three years, the founders of a number of youth organizing’s flagship organizations (including several organizations that participated in the Roots Initiative) transitioned out of their executive roles and passed leadership on to a new generation of young leaders. These leaders, many of whom had founded their organizations in their early 20s, were turning 30 and looking to pass the organizational leadership on to a younger wave of leaders who would be more representative of their constituencies. These transition experiences were sometimes smooth and sometimes challenging, but they all offer rich experiences that can be useful for other youth organizations contemplating transition. Here, we hope to capture some of the insightful principles, inspiring models and lessons learned from those experiences.

OVERALL APPROACH TO TRANSITION

There was a great deal of diversity in the approaches different organizations took in their transition processes, dependent on the state of the organizational development and the political moment. Three lessons emerged as common themes across the different approaches:

- It is important for there to be an extended period of overlap between departing directors and the new directors to ensure adequate time for knowledge transfer and for leadership development. Having new directors “shadow” transitioning directors was a common method.
- Leadership transitions are not just transitions of individuals; they are transitions for entire organizations. Successful transition plans account for significant organizational development work, and involve planning for leadership development at all levels of the organization.
- Leadership transitions in youth organizations cannot be focused strictly on the transfer of skills. Because youth organizing is such a vision-driven field, leadership transitions must integrate both the political and the practical.

The Importance of Overlap Time: Leadership transitions offer both challenges and opportunities for organizations. Many youth organizing groups have used leadership transitions to ensure that their organizational leadership is more fundamentally representative of their constituencies, recognizing that their current directors may have come from more privileged racial or class backgrounds than their youth members or that, at least, a younger director would be more representative of their base. This presents the challenge of an increased need for leadership development and skills training for the new director. While this challenge is by no means insurmountable, it does demand that transitioning leaders—who have either come from more privileged backgrounds or have developed these capacities through hard experience—give serious time and attention to ensure that new leaders are not set up for failure and that they are not left alone to develop these capacities without support. This is the reasoning behind the Roots Initiative’s recommendation for incorporating a “shadowing plan” into executive director transitions: to ensure that new leaders have received extensive training and mentorship before they are expected to assume the full burden of organizational leadership.

Organizational Transitions, Not Individual Transitions: Many youth organizations found that leadership transitions were about much more than the transition of an individual leader. Fundamentally, these leadership transitions were *organizational* transitions, which required intentional work to develop a higher level of institutionalization and organizational clarity on every

level. Most of the recent leadership transitions in the field of youth organizing have been founder transitions. Since many of these organizations have relied on the high level of personal commitment, unique workstyle or individual knowledge of their founders, their departures demanded that the organizations develop more sustainable systems and structures. Leadership transitions were most successful when the organizational nature of the transition was clearly understood and addressed through methods including:

- Conducting an internal diagnosis to assess the organizational development needs during the transition;
- Understanding that it is just as important to deal with intangible questions of organizational vision, principles and culture as it is to deal with the tangible questions of fundraising, databases and structure;
- Prioritizing the work to develop organizational systems and structures as fundamental parts of the transition process; and
- Transitioning skills and knowledge to staff and leaders throughout the organization instead of solely passing knowledge and skills on to the successor.

This level of organizational transition often requires a long-term approach to leadership transition, ensuring adequate time to both create a solid organizational infrastructure and develop a solid layer of new leaders.

One Nation Enlightened (ONE) in Denver offers a helpful model of this organizational approach to leadership transition. Three years before its formal leadership transition process began, ONE began investing heavily in staff development by strengthening the organizing skills of its senior staff. This training work raised the overall skill level of the staff, but it also increased staff members’ investment in the organization and led them to make longer-term commitments to staying on staff. This increased ONE’s organizational stability and opened up space for the former director, Soyun Park, to think more seriously about her own leadership transition. Describing ONE’s transition process, Soyun stressed the importance of developing strong organizational systems. “If your organization isn’t in a solid place, you end up looking for a ‘personality match,’ to find someone who’s identical to your old director and that’s impossible. You’ll never find someone who has the same personality, the same skills and the same commitment. But if your internal structures are strong, you can be clear what you’re really looking for in a new director.”

Integrating the Practical and the Political: Another aspect of transition that emerged was the importance of maintaining the organization’s underlying political vision throughout changes in leadership. In the struggle to find a new director who has the necessary skills to manage a stable nonprofit, organizations can lose sight of the need to find people who can lead organizations politically. Those two skill sets don’t easily emerge in the same person, but they are both necessary. Successful transition processes ensure that new leaders bring vision and commitment to the group’s fundamental principles, and require departing

WHERE DO DIFFICULT TRANSITIONS COME FROM?

The organizations with the most difficult transitions reflected that the challenges that manifested during or after their transition processes were almost always rooted in long-term organizational dynamics, which should have been considered in the early stages of transition planning. One departing director reflected that, “One of the things that really doomed our transition process was the organizational dynamic that existed before the transition process. We could have had a good transition process, but we didn’t deal with some of the organizational dynamics and it poisoned the whole thing. People were furious with me, so I thought, ‘Maybe if I’m gone, it will get better.’ But that didn’t work because those same dynamics just got acted out on the new director.”

Instead of hoping that difficult issues will fade away under new leadership, these issues need to be addressed and resolved directly by the outgoing director so they do not explode after the

transition or subtly undermine the incoming leadership. This requires a clear-eyed organizational evaluation early in the transition process. Transitioning directors should not be afraid to see or to name difficult issues because of defensiveness or fear of conflict. It is important to engage other people in the organization to address these issues. All staff members need to play an active role in addressing difficult issues in order to lay a strong foundation for a stable transition.

leaders to work on developing political clarity at all levels of the organization: directors, staff, leaders and members.

The rest of this piece will be walk through aspects of different phases of a transition process:

1. Initial Assessment and Planning
2. Organizational Development
3. Hiring Processes
4. New Director Training and Orientation

Transition Planning Worksheets follow this reflection piece, providing concrete tools for organizational leaders who are beginning their transitions.

INITIAL ASSESSMENT & PLANNING

The organizations with the most successful transitions began their preparation two or more years before the actual transition. Even before formal transition planning begins, directors can begin to lay the groundwork for their transitions by investing in the leadership development of the entire staff and developing a stable organizational infrastructure. These early investments in organizational development eased the formal transition process, allowing the departing directors to concentrate on their individual leadership transition. All of the groups reflected that formal transition planning must be done no less than a year before the actual leadership transition.

There is no universal model for transition within youth organizations. Effective transition plans are adapted to meet the particular needs and conditions of different organizations. Transition plans should consider both the individual and the organizational aspects of the transition. Therefore, effective transition planning begins with:

PERSONAL REFLECTION

The transitioning director should spend a significant amount of time reflecting on her role and her transition process. This may include reflections on:

- Her responsibilities in the organization, both tangible and intangible;
- Her skills, knowledge, workstyle and political leadership;
- Her personal hopes and fears, and her hopes and fears for the organization;
- The various external factors that could impact her transition, including factors like privilege and oppression, and the perceptions of people outside the organization; and
- The typical transition pitfalls that she could fall into.

This personal reflection will allow the transitioning director to be clear about how her individual orientations and feelings will impact the organizational transition process. The *Self-Assessment & Reflection Worksheet* at the end of this chapter can help with this process.

ORGANIZATIONAL ASSESSMENT AND PLANNING

When reflecting on the state of the organization, it is important to consider:

- **Organizational Development:** This includes reflecting on the strengths and challenges of the organizational structure, and assessing whether the organization has adequate organizational systems (e.g., planning processes), adequate documentation (e.g., organizational history) and adequate infrastructure. This should also include an assessment on the clarity and depth of the organization’s political vision and principles. This will enable the departing director to set goals for stabilizing the organization and systematizing the organization’s intangible practices.
- **Fundraising and Financial Management:** This includes an evaluation of the financial health of the organization and goal-setting for fundraising during the transition. This step also involves assessing the organization’s fundraising and financial management systems so the departing director can clarify what systems remain to be developed or strengthened.
- **Programmatic Work:** This includes assessing the strength and systematization of the organization’s organizing model and planning processes. This step should also incorporate reflection on the organization’s key relationships. This will allow the transitioning director to set clear goals for systematizing the organization’s programmatic work and for passing on key organizational relationships.
- **Staff Development:** This includes an assessment of the political grounding and practical skills of the organization’s staff, as well as an evaluation of the overall organizational culture and morale. This will allow the departing director to create plans that develop the leadership capacities of different staff members. It will also allow her to capture and promote the strong points from the organizational culture, and to troubleshoot potential challenges in staff culture and morale that should be addressed before the transition.

The Organizational Assessment Worksheet at the end of this chapter can help with this process.

- 1) A **self-reflection** by the transitioning director herself (her skills, relationship, workstyle); and
- 2) A thorough diagnostic **assessment of the state of the organization** (its stability, systems, cohesion).

Once these assessments are completed, the groundwork is laid for developing a solid transition plan.

Organizations will differ on how they carry out these assessments. Some organizations will have the director do this assessment work individually, while others will do it collectively. The appropriate approach depends on the needs, capacities and culture of each organization.

Transition plans look very different for organizations planning to hire the new director from inside the organization compared to organizations planning to hire from outside. For organizations planning to hire externally, the bulk of the organizational development work takes place *before* the new director is hired. In these cases, the orientation is focused on transferring those structures. For organizations planning to hire internally, training and orienting the new director often happens simultaneous to the organizational development work. The new director often plays an active role in organizational development work instead of waiting until after the full transition is completed.

Best Practices for Transition Planning:

- Most directors juggle many formal and informal roles; this is especially true for founding directors. The large number of roles and the lack of definition of those roles make it difficult to conceptualize an effective transition. Clarifying the actual roles that the director plays in the organization helps in developing a plan to effectively pass on skills and information.
- Founding directors should be especially thorough and deliberate in their assessment of their organization and of their own role. Directors often hold too many responsibilities, both for their own well-being and for the collective well-being of their organizations. In particular, founding directors tend to hold a lot of invisible responsibilities and knowledge. To account for this, departing directors should assess the real division of labor and knowledge by organizing the intangibles into transferable organizational knowledge, and developing a sustainable division of labor.
- Many youth organizations lack important aspects of organizational infrastructure, and these gaps make transitions particularly challenging. However, transitions open up the opportunity to build stronger and more stable organizations. Getting clear about the real state of the organization’s infrastructure is crucial to developing a solid transition plan.
- Successful transition planning is comprehensive—politically, practically and personally. Departing directors need to consider the transition of political principles, vision and analysis; the practical skills needed to run the organization both as a nonprofit and as an organizing shop; the personal aspects of the transition, including how their personal reactions and the reactions of other people inside the organization will impact the process; as well as the political ramifications their transition may have.
- In transition planning, directors should think of themselves as both nonprofit leaders and as movement leaders. This requires directors to think through the systems and skills needed to maintain a solid nonprofit organization, and also to think about building an organization that will build community power.
- Transitions are very emotional processes for everyone involved, though organizations don’t always recognize or discuss those emotions. Many times, emotions can provide important signals for the work. For example, having fear about the future financial stability of an organization is a very rational emotion that could signal an important area of transition work. Unrecognized emotions can hinder effective transitions, causing people to hold up the process or run away from the organization too quickly. If everyone involved can recognize and name their emotions, organizations can address the potential impact and develop processes that are effective, healthy and caring for everyone involved. It is important to think about what kinds of support everyone needs in the process.
- It is also important to consider how the dynamics of privilege and oppression could impact the transition process. If the former director comes from a position of relative privilege and is transitioning leadership to a person from a more oppressed community, there will be differences in their life experiences and how they will be perceived. It is helpful to directly and intentionally address these differences in the planning process.

ORGANIZATIONAL DEVELOPMENT

The majority of the work in a transition process is the organizational development and fundraising work, which should be designed to develop a clear organizational model and systems to pass on.

Effective transition-focused organizational development incorporates both tangible systems—like well-documented cash flows or in-depth organizational histories—and *intangibles*. Following is a list of the more tangible arenas of documentation and systems development, identified by organizations that have recently gone through transitions:

ORGANIZATIONAL DEVELOPMENT	FUNDRAISING & FINANCIAL MANAGEMENT	PROGRAMMATIC WORK	STAFF DEVELOPMENT
<ul style="list-style-type: none">• Organizational Vision, Values & Principles• Political Analysis• Organizational Structure• Decision-Making Processes• Organizational History• Organizational Culture• Office Administration• Board Policies	<ul style="list-style-type: none">• Funding History• Foundation Contacts• Fundraising Planning• Grant Templates• Cash Flow• Budget Development Process• Financial Oversight	<ul style="list-style-type: none">• Organizing Model• Program Planning• Workplan Development• Program Evaluation• Organizational Relationships	<ul style="list-style-type: none">• Personnel Policies Manual• Hiring Process• Orientation Process• Supervision Structure• Staff Evaluation

All of the Roots Initiative organizations that underwent transition processes stressed that, in addition to these concrete aspects of organizational development work, it was also important to address the intangible aspects of the organization. An organization’s intangibles—its culture, principles and morale—are often the glue holding the organization together. But these intangibles are also the most difficult aspects of an organization to transition to new leadership, since they often rely on individual personalities and philosophies. It is crucial that organizations do a thorough internal inventory of their organization’s intangibles and work to develop systems to maintain their valued informal practices and philosophies.

Soyun Park described ONE’s process of institutionalizing its organizational culture around team-building and collaborative decision making, which had previously relied on informal dynamics and personal style. “I have a personal orientation to sharing information, and that helped ONE to develop a culture of direct communication and team unity. But, as I was transitioning, we realized that we couldn’t rely on replacing my personality. We took our informal practice of constant sharing and dialogue, and we turned it into an organizational policy and an organizational principle about team-building and collaborative decision making. Now when a new person comes in to the organization, our culture is set regardless of the individual personality.” These principles and policies were shared in the hiring interviews, and they were explicitly discussed during the orientation process.

The School of Unity and Liberation (SOUL) used a similar approach to institutionalize its organizational culture during a recent leadership transition. SOUL’s leadership documented their organizational philosophy and organizational culture. They then developed a list of expectations for staff members and for organizational leaders, laying out the specific practices that would help to create the organizational culture they were aiming for. This document was shared with candidates in the hiring process,

and it is now incorporated into all orientations for new staff. Following is an example of one aspect of organizational culture, drawn out into staff expectations and leadership expectations:

ORGANIZATIONAL CULTURE	EXPECTATIONS OF STAFF	EXPECTATIONS OF LEADERSHIP
SOUL believes in direct communication between staff members. In order for an organization to be healthy and functional, it must be a place where staff members are encouraged to communicate with each other directly and constructively.	<ul style="list-style-type: none">• Engage in timely, direct communication with staff members about issues or concerns.• Support and challenge other SOUL staff members in engaging in direct and constructive communication about issues.• Ask questions about the organization if anything is unclear or seems problematic.• Raise concerns about the organization directly and constructively.	<ul style="list-style-type: none">• Serve as a role model on SOUL Staff Expectations.• Facilitate staff Criticism/Self-Criticism processes, role-modeling self-criticism, positive feedback and openness to criticism.• Seek out feedback about yourself as a leader from other staff members.• Actively seek out feedback on the organization from movement allies and leaders.

Arenas of Organizational Development Work: Organizations that accomplished a successful transition process reported using a wide range of methods to carry out organizational development work. Following is a list of six arenas (documentation, systems development, organizational dialogues, support structure development, fundraising, leadership development and trainings) with relevant examples to illustrate the role that each method can play in transition-focused organizational development.

- **Documentation:** Documentation allows transitioning directors to capture the knowledge their organizations have accumulated over the years so that wisdom and history are not lost. Documenting organizational models, practices, principles and politics is fundamental to ensuring organizational continuity and stability. Documentation work should include both the development of formal organizational documents (like organizational histories) and the work to ensure that filing systems, archives and templates are clearly organized and available to the organization after the transition.
Sample documentation projects:
 - Write an organizational history document.
 - Develop a clear filing system, including both paper and electronic files.
- **Systems Development:** As stated earlier, many youth organizations were simultaneously transitioning out of their “start-up” phases and into periods of organizational maturity. This requires a transition away from informal approaches to the work and toward clear systems. Developing clear systems for program planning, evaluation and fundraising planning ensures that new directors don’t waste time on guesswork or reinventing processes. Clear systems also provide an effective structure to help departing directors identify key information to transfer and provide a coherent structure for passing on that information.

Sample systems development projects:

- Document program planning, workplan development and evaluation processes, including how often they should take place and what processes the organization goes through to make program decisions.
- **Organizational Dialogues and Processes:** Rather than relying on departing directors to communicate everything, successful transitions rely on the engagement of different stakeholders—staff, board and members—in the transition process. Organizational dialogues offer a number of benefits during the organizational development aspects of the transition. First, they provide a mechanism to engage the whole organization in carrying out a successful transition process. Second, they give other stakeholders input into the organizational documentation and systems development. This ensures that the content of these projects actually reflects the beliefs and practices of the organization as a whole and that other stakeholders are invested in carrying them through after the transition. Finally, creating spaces for organizational discussion and reflection throughout the transition process allows departing directors to troubleshoot challenging dynamics and address them proactively.
Sample organizational dialogues and processes:
 - Facilitate clear conversations about the organization’s political vision and mission with your staff and members. Give others space to question, challenge and change the vision. The goal is to ensure that there is organizational buy-in and investment from everyone.
 - Directly address any underlying issues that have the potential to arise after you leave. Make sure these issues are well-resolved and that the organization learns from those experiences.
- **Support Structure Development:** Transition processes are most effective when many people, both inside and outside the organization, are engaged in supporting the process. These support structures ensure that all of the work doesn’t fall on the departing director, and they ensure that structural support for the transition process will continue after the departing director has transitioned out.
Sample support structures:
 - Initiate a “board transition committee” that can play a leading role in the transition and hiring processes, and conduct regular check-ins with the committee or the board as a whole.
 - Personally introduce your successor to the primary contacts at your key organizational allies. Ask your allies to actively engage in maintaining close relationships with the organization after you leave.
- **Fundraising:** All successful transitions rely on intentional work to ensure the financial stability of the organization. Transition fundraising work has several components: (1) ensure that the fundraising materials, such as grant templates and budgets, are thoroughly developed and documented; (2) raise resources to cover the costs of the transition process itself and to provide a cushion to help the organization through the potential fundraising challenges of the first post-transition year; and (3) ensure that the organization’s funders are adequately informed about the transition process and are invested in the future stability of the organization.
Sample fundraising work:
 - Turn your transition into a fundraising opportunity. Raise money for your transition, either from your current funders, who may have extra resources for organizational development, or from new funders.
 - Aim to have a full year of funding committed to the organization before you leave; don’t leave with less than six months of expenses raised. This will give your successor breathing room to learn the ropes of fundraising for your organization. Consider approaching funders for multi-year support or a cash reserve to provide some cushioning for the organization.

- **Trainings and Leadership Development:** Successful transitions integrate thorough training for the incoming director and leadership development with other stakeholders in the organization. This ensures that the organization as a whole has the practical, political and personal skills they need to stabilize the organization. It is best to focus on developing the leadership of the staff, members and board before hiring the new director, so the focus can be on the new director after the hire.

Sample training and leadership development work:

- *Identify organizing skills training that will develop the organizing capacity of your staff and lead members. Help staff members and lead members identify veteran organizers who can mentor them in their future development and growth.*

PLANNING FOR EXTERNAL COMMUNICATIONS

There are, broadly speaking, two approaches to communicating about leadership transitions. The first approach engages in open communication about the transition process from the beginning, notifying organizational allies and funders once the initial transition plan has been developed. This approach enables the organization to engage in open dialogue about the process, and to ask for support without worrying about disclosure (for example, asking for funding to support the transition process or asking allies to suggest potential candidates). The drawback to this approach is that transitions tend to make people nervous, so disclosing information before all of the pieces are in place can lead to an extended period of external questioning and doubt. This can be particularly challenging when the transition process does not unfold as it was originally planned, a common experience for several of the organizations interviewed.

Conversely, organizations may wait to notify external allies and funders about the transition process until most of the transition work is complete. This generally means that information about the transition is kept private until the bulk of the transition-focused organizational development is completed and a new director is hired. This approach gives the organization more control over the messaging around the transition, enabling the organization to project a more stable and decisive impression about the transition. The drawbacks of this approach are that it does not enable the organization to seek extensive outside support, and information about the transition may unintentionally leak out (for example, during the candidate search). This second challenge can be addressed through tight information control.

Both of these approaches can be effective. The main priority is to make sure that the approach is deliberately chosen based on the organization's needs and is then consistently implemented. If organizations are not deliberate about their external communications strategies, they lose their ability to impact the external perceptions of the transition process and may face a whirlwind of rumor and speculation. The challenge of keeping an organization's transition only halfway under wraps can be seen in the often-cited scenario in which an organization's funders and allies hear about leadership transitions through the rumor mill, leading to distrust and skepticism and, eventually, a loss of funding support.

Either communication strategy should include plans for communicating with both organizational funders and organizational allies. Communication methods include: one-on-one discussion with the departing director notifying funders and allies of the impending transition, a formal letter announcing the hiring of a new director, and/or in-person meetings to introduce the new director to close allies and staff.

It is important to allow enough time to carry out a thorough communications plan. In general, organizations reported that they needed at least three months to systematically announce the transition and introduce the new leadership to key funders and allies. Making time for in-person introductions—when the departing director is present to introduce the new director—was identified as crucial for conveying a sense of a stable transition process. When departing directors left without introducing their successors to key funders and allies, they put these new directors at a disadvantage.

HIRING PROCESSES

Hiring from Inside the Membership: Youth organizations have historically been highly committed to prioritizing the leadership of people from impacted communities; young people of color and young women make up the overwhelming majority of the directors of youth organizations. Many youth organizing groups have used leadership transitions to ensure that their organizational leadership becomes even more representative of their constituencies, recognizing that their current directors may have come from more privileged racial or class backgrounds than their youth members or that, at least, a younger director would be more representative of their commitment to leadership from the base.

Organizations that choose to hire from within do so from a deep commitment to ensuring constituent leadership, often choosing to dedicate significant time and resources to help these members develop a solid set of organizing and nonprofit management skills. As youth organizing pushes its own boundaries to advance the leadership of younger people and people from working-class backgrounds, organizations face particular challenges, which are reflective of the nonprofit structure (e.g., the demand for a high level of professionalization for executive staff and the challenge of fundraising and financial management). Many nonprofit management skills are highly “professionalized,” and directors often developed these skills through college and other professional employment, whereas members of youth organizations generally have not had access to these skills-development opportunities.

The Center for Young Women's Development (CYWD) is a good example of an organization that has succeeded in developing young working-class women of color from its membership into formal leadership positions. It is not then surprising that CYWD sees its work to develop the leadership of the young women in the organization as a central part of its mission, rather than an optional method through which to do its “real” programmatic work. Other successful examples include Sistās on the Rise and Sisters in Action for Power.

If organizations decide to prioritize internal hires, they must dedicate a serious amount of time and resources to the process. If this degree of leadership development work is not carried through, organizations may be setting these young leaders up for failure. This has been the experience of several organizations where youth leaders have been put into formal leadership roles without adequate preparation, leading them to either resign after short leadership tenures or to face serious organizational crises.

When organizations have hired from the inside, the key success factors have been:

- A serious dedication to the time and resources required to develop leaders. This includes a long-term commitment to a “shadowing” period (between one year and two years) in which the new director can overlap with the departing director and learn her new role through hands-on experience backed up with training and one-on-one support;
- A willingness to be absolutely honest in assessing the skills of these developing leaders, as opposed to glossing over real deficiencies out of idealism or liberal guilt;
- A willingness to engage directly in challenging biased perceptions that these leaders are inadequate because of their age, race, class, gender or sexuality;
- A willingness to allow the organization to transform under new leadership.

There are several pitfalls that have emerged for organizations carrying out these internally-oriented leadership transition processes. In several cases, the young leaders experienced life crises or major life changes that prevented them from finishing the transition process. In other cases, the young leaders decided that they wanted to go to school or pursue other career paths instead of assuming directorial positions at their organizations. In these situations, the organizations had to restart their internal leadership development processes with new members, sometimes after a year or more of shadowing work had been done with the original member. If an organization is going to commit to hiring young leaders from inside, they must have a willingness to pick up the pieces and start over if the leadership development doesn’t work the first time.

Hiring from Outside the Membership: While virtually all youth organizations prioritize the leadership of oppressed people, they do not all decide that someone from the membership must fill the director role. Some organizations believe it is more important to develop young peoples’ ability to fully direct the programmatic aspects of the organization, but that leadership of the nonprofit aspects are secondary. Some organizations believe the amount of time that must be invested in leadership development detracts too much from the organizing work itself. Still others believe that the primary issue is not whether a director fully represents the organization’s constituency but whether directors have the ability to work effectively and respectfully with the organization’s constituency.

Organizations that have hired from outside have done so in a variety of different ways. Many organizations have chosen to hire staff members who have deep experience with the organization; while this is not “hiring from the membership,” it does address some of the potentially challenging dynamics of hiring people from outside of the organization. Some organizations have chosen to hire someone who is representative of the constituency, but who developed the necessary leadership skills through work in other organizations. Other organizations have hired people from the outside who represent some, but not all, of the organizational constituency. Some organizations have developed co-directorship structures that pair people who have developed from inside the organization with people who are hired from the outside.

Just as there were challenges that emerged when organizations planned to hire internally, there are challenges embedded in external hiring processes. Outside directors who do not fully represent the organization’s constituency may not know how the organization expects people to handle differences of privilege and oppression, and they may end up contributing to feelings of disempowerment and frustration within the staff and membership. Even if the new director does represent the constituency, an outside person will have less knowledge of the organization’s principles, culture and methods of work. As a result, they may impose methods that feel alienating to other staff and members. Finally, some organizations have seen youth members feel frustrated and disrespected when the decision is made to hire someone from the outside. Internal conflicts can erupt, leading some members to leave or to feel disempowered. It is therefore crucial for the organization to develop clear plans to promote leadership development and member ownership during and after the transition processes. It is also important to ensure that the organizational principles and culture are clearly communicated to the new directors during the orientation process in order to

ensure that hiring from the outside did not compromise the organization’s integrity.

There is no easy answer to the question, “Should we hire from inside or outside the organization?”—and there is no perfect approach. Each approach has its benefits, and each approach has its unique costs and pitfalls. Whichever path is chosen, it is important for organizations to consider the challenges that are likely to arise and to address them proactively in the transition planning process.

Interviews and Decision Making: Interviews are a crucial opportunity for the organization to get a real sense of the skills, personality and style of the potential candidates. It is important for organizations to be clear about the criteria by which candidates will be judged before interviews begin. Once interviews have begun, personal impressions and relationships can cloud objective judgment. Soyun Park of ONE observed that it is important to remind the organization during the interview stage that the goal is not to hire another version of the departing director, but to identify a candidate who believes in the organization’s mission and who can meet the requirements of the position.

Interviews offer more than a chance to get to know the candidates. They also offer a chance to share detailed information about the organization in order to make sure there is a good fit between the candidate and the organization. Several groups noted the importance of giving candidates organizational materials to review before the interview, specifically documents outlining the organizational politics, principles, culture and structure, fundraising plans showing how much money has been committed and how much money still needs to be raised, and documentation of the organizing model. In this way, the candidate will have a more thorough understanding of the state of the organization, and the hiring committee can then engage in a deeper dialogue and exploration with the candidate. This dialogue is most effective when the committee probes for real concerns and contradictions that the candidate may have with the organization. This can prevent the unpleasant surprise of learning, for example, that a newly hired director does not believe in the organization’s commitment to internal democracy.

Several organizations noted the importance of engaging multiple stakeholders (such as, members, staff and board) in hiring decisions. It is important to be intentional and explicit about which groups have input into the process and which groups are responsible to make the final decision. Some organizations developed a hiring committee composed of multiple stakeholders,

CO-DIRECTORSHIP LEADERSHIP STRUCTURES

Transition processes instigated a re-evaluation of leadership structures in several organizations. Several of the youth groups that went through transition in the past several years implemented a co-directorship structure in order to deal with the challenges of an individualized leadership model, which required one person to hold a wide range of skills and capacities and to manage a sometimes overwhelming workload. Co-directorship models are very controversial leadership models. Advocates and opponents of the co-directorship model can all point to various success stories and failures to validate their positions.

The overall conclusion drawn from the wide range of experiences with these two models is that there is no absolute right or wrong model for leadership. The correct approach depends on the particular conditions impacting the organization and the particular dynamics between the people who are sharing leadership. Success in implementing whichever model depends on intentional planning to address the complicated challenges that can emerge in each case: the challenge of a single director feeling overburdened on the one hand, and the challenge of cohering a functional team in the midst of a major organizational transition on the other.

while other organizations had their boards coordinate the process and make the final decision. While the board is legally responsible for the final decision, many organizations developed processes through which other stakeholders had a decisive voice in the process. It is crucial, if nothing else, to have members participate in some aspect of the interview process so that the organization can evaluate how the candidates interact with youth members.

NEW DIRECTOR TRAINING & ORIENTATION

The Importance of Overlap: As noted earlier, many organizations stressed the central importance of having “overlap” time between directors to ensure a successful orientation process. This overlap time allows enough room for the departing director to transfer knowledge to the new director, and it gives the new director time to learn the ropes before having to face the pressure of complete responsibility. It gives other people in the organization time to adjust to the personal dynamics of the transition, reducing the anxiety of an abrupt change or sudden departure of the outgoing director. It also allows for time to troubleshoot potential problems before they arise and to tweak established structures to reflect the approach of the new director. Mei-ying Ho reflected on the importance of overlap time in her transition into leadership at SOUL: “Overlap time was important in my transition. It was very crucial for me to have a high degree of communication with the old directors. I understand that there’s a school of thought that says that it’s important for transitioning directors to step out completely to give new people space, but I feel like that approach leaves people hanging.”

Organizations varied in the length of their overlap time, spanning from one month on the low end to two years on the high end. The length of overlap time will tend to be longer with internal hires (ranging from six months to two years or more) and shorter with outside hires (ranging from one month to six months) due to the different approaches to leadership development and the different dynamics of transferring authority in each situation.

When there is an extended overlap time, it is important for the departing director to gradually step back from leadership and not hold on to authority and control. Soyun Park had an eight-month overlap period with ONE’s new director, DeQuan Mack. She reflected, “Of course, there were authority challenges. But I was very aware about pushing people to look to our new director for leadership, telling people to go ask him when they had a question or needed support or guidance. The relationship has to be clearly defined. You can’t stay on without intentional conversation about how your presence will impact the transition of the leadership and authority.”

Several organizations had their departing directors stay on staff for some time after the transition, placing them in a different position in the organization. Eric Braxton from the Philadelphia Student Union stepped down from leadership, but stayed on for several months to finish out a campaign. He said, “I was around for advice and for check-ins, and I didn’t step in except where people asked for help.” At ONE, Soyun Park stayed on for several months to do administrative support work. She said, “If I had stayed on in an organizing capacity, it would have been difficult for people to recognize our new director. But it did help to stay on in a supportive capacity. It gave people time to adjust to the transition.”

Developing an Orientation Plan: Orientation plans ensure that departing directors can cover a wide range of topics within a short timeframe. Following are some best practices for conducting effective transition orientations:

- Incorporate explicit discussions about the organization’s deeper political analysis, vision and principles into your orientation process. Flag any issues or differences your successor has for future discussion within the organization.
- Communicate your evaluation of the organization’s culture to your successor during your orientation. Explicitly raise any issues that may arise in the future. Also make sure that you clearly lay out the experience and commitments of the staff members who are staying with the organization.
- Communicate your assessment of the staff and members’ political development and practical organizing skills.

- Be transparent about mistakes you might have made in your time at the organization. Covering them up now will only mean that they re-emerge as bigger problems later on.
- Explicitly communicate the organizational structure, including its strengths and challenges, to your successor. Make room for dialogue about the structure, and be open to tweaking the structure, within limits, to reflect the approach of the new director.
- Thoroughly review all of your funding history verbally with your successor, giving them a sense of the individual program officers, the foundations as institutions and the broader funding world in which you operate (e.g., the difference between youth organizing funders and youth development funders, and how you try to work with each of them).
- Set up personal meetings with all of your major funders to personally introduce the new organizational leadership. Personal introductions are crucial in conveying the sense of a stable transition process. Introduce your successor to your board in person, making sure the relationship starts out on the right foot.
- Step back. Give your successor space to start doing the work as soon as possible during the training and orientation period.
- After the hiring process, review the hard numbers from your fundraising and cash flow. Have a realistic conversation about where potential financial problems could arise.
- Clearly communicate your organizing model to your successor. Encourage them to keep the model alive, growing and changing.

Potential Challenges: Challenges will inevitably arise, even in the most thorough and intentional transition processes. One challenge that emerged in several organizations occurred when members and staff had a difficult time accepting the new director. This led people to be quick in judging the new director, leading to internal divisions and a drop in organizational morale. It is important to acknowledge the potential for this dynamic and to address it on the front end of the transition process. Soyun Park of ONE captured the nature of this proactive approach well, saying, “Before DeQuan started, we had many conversations about not comparing the new director against the old director. We need to give new people space to be themselves, but that’s hard for staff who are used to a specific leadership style and who are used to the organization operating in a specific way. People need to give the new person a chance.” Having these conversations proactively can alleviate the need to put out fires later.

Another set of challenges emerged when departing directors did not want to let go of their authority in their organizations. For example, some departing directors inserted themselves onto the board of directors without giving the new director a say in the process. One former director argued that, “It should be up to the new director if the old director joins the board. They shouldn’t inherit the old director in that kind of authority position. That kind of ongoing hands-on work feels uncomfortable to people, especially to the new director who needs space to show leadership. You need to step back and let go.”

On the other hand, several organizations cautioned that the departing director should not completely cut ties with the organization. Relationships with former directors can provide important support to new directors and bring historical perspective to organizations. However, most groups agreed that it was good for departing directors to take some time away from the organization before re-establishing a new formal relationship. In establishing a new relationship to the organization, it is important for the former director to be thoughtful about power dynamics, respectful of the leadership of the new director and flexible in exploring different structural options for the relationship.

A final challenge is that the transition will inevitably be difficult on some level for the new director. Whether it is the difficulty of navigating challenges that have already been explored in this chapter or just the stress of taking on new responsibilities,

stepping into a leadership role is deeply challenging. Mei-ying Ho of SOUL described the importance of acknowledging those difficulties and asking for support: “It was impossible to pretend that there weren’t things that were really hard for me. I was 25 and assuming leadership of an organization that had played a big role in my own development. It was an essential time for the organization’s growth and for my personal growth, and I needed to go through that growing pain.” She reflected that new directors need support in the transition period, but noted that it is often hard for new directors to admit their vulnerability and ask for that support. “I wasn’t as honest as I could have been about how hard it was for me. If I had been more clear on the front end, I could have built trust and gotten more support in making it through that time.” Mei-ying’s experience points to the importance of building support networks to sustain new directors, but her reflections also point to a key lesson for approaching leadership transitions: work diligently to assess underlying dynamics and potential challenges, discuss them openly and honestly and then develop a plan to address them proactively.

Transitions are long and challenging processes. But, if they are planned well and carried out consistently, they can give organizations an opportunity to take their work to a higher level. Youth organizations, in particular, have a great deal to gain in the process of passing leadership on from founding directors to a new generation of leaders.

Tools Overview

STEP 1: ENGAGE IN IN-DEPTH SELF-REFLECTION ABOUT YOUR POSITION AND YOUR TRANSITION

Tool: Self-Assessment & Reflection Worksheet

This tool will help you focus on you, your position and your needs as you begin your transition. It will give you space to reflect and prepare for a healthy transition for both you and your organization. This worksheet should be completed at least one year before your intended leave date. Ideally, it would be done even sooner to allow adequate time for transition planning and execution. This self-assessment should be done together with the organizational assessment below in order to develop a thorough transition plan.

STEP 2: ASSESS THE STATE OF YOUR ORGANIZATION AND IDENTIFY THE MAJOR AREAS OF WORK FOR YOUR TRANSITION.

Tool: Organizational Assessment Worksheet

This tool provides a way to assess the transition needs of your organization. It will give you space to reflect and prepare for a healthy transition for both you and your organization. This tool accounts for the reality that transitions open up opportunities for building stronger and more stable organizations. Many youth organizations are missing some important pieces of organizational infrastructure, making transitions a potentially challenging time. This worksheet will help you to identify whether you are missing key components of organizational infrastructure, so you can make a plan to develop these components and leave the organization in a more solid place. This assessment tool should be completed at least one year before your intended leave date. Ideally, it would be done even sooner to allow adequate time for transition planning and execution. This organizational assessment should be done together with the self-assessment above in order to develop a thorough transition plan. You can do this organizational assessment yourself or do it together with other stakeholders in the organization (e.g., lead staff, lead members, board members). Either way, it is important for you to share the results with other people in the organization.

STEP 3: DEVELOP YOUR TRANSITION PLAN, INCLUDING SETTING YOUR GOALS AND DEVELOPING A TIMELINE.

Tool: Transition Workplanning

Once you have completed your personal reflection and your organizational assessment, you are ready to begin developing the workplan for your transition. Make sure to thoroughly review your reflection and assessment, and incorporate all of the necessary areas of work into this phase of your planning! Your workplan will look different if you are planning to hire someone from inside of the organization versus someone from outside of the organization. In most instances, decisions about an internal hire will need to be made earlier in the process, and you would institute a longer training and shadowing period. For external hires, decisions may be made later in the process, and a more traditional training and orientation period of one to two months would follow. Given these differences, two alternate planning forms follow—one for external hires and one for internal hires. Again, planning should be done no less than a year from your planned transition date.

Solid transition workplans include:

1. **Setting Clear Goals for the Transition Process:** Drawing on the Organizational Assessment, transitioning directors should set concrete goals for organizational development, fundraising, staff development and the leadership transition itself. These goals will shape the rest of the transition workplan.
2. **Defining Methods of Transition Work:** The next step in transition planning is to determine what methods will

best accomplish the transition goals. Typical categories of transition work include documentation projects, systems development projects, organizational dialogues to develop collective buy-in to the transition process, fundraising work, external communications, and the hiring and orientation of the new director.

3. **Developing a Concrete Timeline:** Once the goals and methods of work are clarified, they should be laid out into a concrete timeline that will help everyone in the organization to understand the pace and flow of the transition process.

The Transition Workplaning Worksheet at the end of this chapter outlines useful steps for both internal and external hires.

STEP 4: ENGAGE IN INTENSIVE ORGANIZATIONAL DEVELOPMENT AND FUNDRAISING WORK TO LAY A SOLID FOUNDATION FOR YOUR TRANSITION.

There is no precise tool for this phase, as the fundraising work obviously varies between organizations. See the earlier part of this chapter for reflections on effective approaches to the organizational development work associated with transitions. You should commit at least six months for this intensive organizational development and fundraising work.

STEP 5: RUN YOUR HIRING PROCESS.

There is no precise tool for this phase, as hiring processes vary so greatly between organizations. See the earlier part of this chapter for reflections on effective leadership hiring processes. You should commit at least six months for this part of the process.

STEP 6: CONDUCT AN IN-DEPTH ORIENTATION TO INTRODUCE YOUR SUCCESSOR TO THE INS AND OUTS OF THE ORGANIZATION.

Tool: Orientation Planning

You will have limited time to work together with the new director. It is important that you plan that time well. This tool will walk you through three steps of orientation planning:

- 1. Developing a list of topics to address and tasks to accomplish during the orientation period
- 2. Developing a broad week-by-week timeline to address different topics and tasks
- 3. Developing a detailed weekly schedule based on the week-by-week timeline

This tool includes both a sample orientation plan and blank forms to fill out to based on the specific needs of your organization.

NOTE: These worksheets are largely drawn from SOULs transition process. They were adapted and expanded for this toolkit.

This is a very thorough toolkit; it may feel overwhelming to do it all. You can tailor it to meet your needs or break it down into pieces to make it more manageable.

Tool 1

SELF-ASSESSMENT & REFLECTION
WORKSHEET FOR ORGANIZATIONAL
LEADERS BEGINNING THEIR TRANSITIONS

This tool will help you focus on you, your position and your needs as you begin your transition. It will give you space to reflect and prepare for a healthy transition for both you and your organization.

CLARIFYING WHAT ROLE YOU PLAY IN THE ORGANIZATION

Review your job description, and then reflect on the following questions. You may want to solicit feedback from your co-workers to help you answer these questions accurately; they may notice things that you don’t see.

Responsibilities: My clearly defined responsibilities in the organization are:

Intangibles: The intangible and invisible things that I do are:

Reflect on Your Position: Is the combination of my formal and informal responsibilities reasonable? Or, is it too much for one person to hold (either for the director’s well-being or for the health of the organization)?

Note: This should be open to organizational discussion, but it is important for you to get clear on your opinion first.

Future Structure: How should my position be structured in the future?

Note: This should also be open to organizational discussion, but it is important for you to get clear on your opinion first.

Political Vision: Do I play a particular kind of political leadership role (e.g., bring a bigger vision for our work, develop other peoples’ vision and analysis)?

Your Knowledge: Do I have unique knowledge about the organization or our work?

Your Skills Set: Do I have unique skills that help me in my work?

Programmatic Skills:

Organizational Development Skills:

Your Relationships: Do I have a unique relationships that help me in my work?

Your Workstyle: Do I have unique workstyle that impacts the organization, positively or negatively?

Passing It On: How can I pass on those skills, knowledge and relationships to my successor or to other people in the organization?

Note: This is an initial brainstorm. You will develop this into a more systematic plan later.

CLARIFYING YOUR HOPES AND FEARS FOR YOUR TRANSITION

Future Plans: What do I want to do with my life and work after my transition?

Personal Hopes: The things that I am excited about for my life after my transition are:

Personal Fears: The things that are scary for me for my life after my transition are:

Organizational Hopes: The things that I am excited about for the organization after my transition are:

Organizational Fears: My fears for the organization after my transition are:

Moving Forward: How can I build on these hopes and address these fears?

Building Support: What kind of support do I need from people during and after my transition process?

BEING CLEAR ABOUT FACTORS IMPACTING YOUR TRANSITION

The purpose of this section is to help you be clear and intentional about factors that are often left unrecognized and therefore unaddressed. Each of these factors could have positive or negative impacts on the transition process, but clarity and thoughtfulness will give you the chance to build on the positive and directly confront the negative.

Privilege & Oppression: How does my position of privilege and/or oppression impact the transition process? Does the person who will replace me have a similar position or a different position? How will that be a factor in the transition process? How can I address those dynamics?

Note: This is a particularly important question for organizational leaders who come from positions of privilege and are being succeeded by people from oppressed communities.

<u>Privilege & Oppression</u>	<u>Potential Impact</u>	<u>How to Address</u>
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Personal Reactions: Are my personal reactions to the transition process likely to help or hurt the transition process? How can I address that?

<u>Personal Reactions</u>	<u>Potential Impact</u>	<u>How to Address</u>
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Personality & Workstyle: How are my personality and workstyle likely to impact the transition process? How can I address that?

<u>Personal Reactions</u>	<u>Potential Impact</u>	<u>How to Address</u>
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Perceptions & Reactions: How might other people, both inside and outside of the organization, perceive and react to my transition? How can I address that?

<u>Personal Reactions</u>	<u>Potential Impact</u>	<u>How to Address</u>
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Members:

Staff:

Board:

Allies:

Funders:

Future Plans: Do my plans for my life after my transition have any impact on my transition process? How can I address that?

For example, are you applying to school on a specific timeframe? Do you need to plan in time to apply for a new job?

<u>Future Plans</u>	<u>Potential Impact</u>	<u>How to Address</u>
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AVOIDING TYPICAL TRANSITION PITFALLS

There are many pitfalls and mistakes that other organizational leaders have made during their transitions. This exercise is designed to help you identify the errors you are most likely to make in your process—given the particularities of your organization and your own personal tendencies—so you can develop a plan to avoid those pitfalls.

Review the following list of typical transition errors. Many of them are related, but try to reflect on the specific errors you are most likely to make. Circle the ones that you feel like you could be in danger of falling into. Spend some time reflecting on the reasons why you might be likely to make these particular errors and how you can address them in your transition planning process.

TYPICAL TRANSITION PITFALLS

- Taking your knowledge with you
- Taking your relationships with you
- Staying too involved
- Holding on to power
- Not leaving any space for your successor to bring their own vision
- Disappearing after your transition
- Cutting your transition time too short
- Leaving before you have found a successor or interim director
- Extending your transition too long
- Disorganization
- Not making time and space in your workplan for transition tasks
- Continuing to play all of your old roles until the day you leave
- Ignoring the organizational development aspects of your transition
- Ignoring the programmatic aspects of your transition
- Ignoring the political aspects of your transition
- Leaving the organization in an unstable financial position
- Leaving the organization without a clear sense of mission and vision
- Leaving the organization in an unstable programmatic position
- Leaving the organization in an unstable personnel position
- Covering over your mistakes and shortcomings
- Taking all transition responsibilities on yourself
- Controlling the hiring process to find your successor
- Looking for a successor who is a new “you”
- Ignoring your own needs in the transition process
- Putting your own needs over the needs of the organization
- Letting your personal reactions negatively affect your transition work
- Downplaying your own contributions
- Being overly optimistic about the abilities of your successor and other people in the organization
- Being overly pessimistic about the abilities of your successor and other people in the organization
- Avoiding hard conversations with people on staff because you won’t have to deal with the consequences
- Ignoring how your social privilege may have made it easier for you to do your work
- Ignoring the importance of identifying a successor who is representative of your constituency
- Being overly idealistic or simplistic about how easy it will be to pass on your role to someone with less privilege or less experience

- Communicating too little about your transition
- Communicating too much about your transition

Reasons: Why do you think you would make these particular errors?

Solutions: How can you address these issues in your transition planning process?

Support Inside the Organization: Are there other people in the organization (such as, staff or board) who can support you in developing an effective transition process?

Outside Support: Do you need outside support to develop an effective transition process?

A NOTE ON TRANSITION COACHES: Transition coaches can provide helpful resources to support you and your process. They bring experience with transitions in general, as well as an outside perspective to your process in particular. They can also provide much-needed support and advice to transitioning directors, reducing feelings of confusion and isolation.

Tool 2

ORGANIZATIONAL ASSESSMENT WORKSHEET

This particular tool provides a way to assess the transition needs of your organization. It will give you space to reflect and prepare for a healthy transition for you and for your organization. You can do this organizational assessment yourself, or do it together with other stakeholders (e.g., lead staff, lead members, board members). Either way, it is important for you to share the results with other people in the organization.

ORGANIZATIONAL DEVELOPMENT

Organizational History: Is your organization’s history thoroughly documented? Is there knowledge you hold about the organization’s history that needs to be passed on?

GOAL: Leave the organization with thorough documentation of your organizational history.

POSSIBLE TASKS:

- ☐ Update and/or develop an organizational history.
- ☐ Go through your organizational files (electronic and paper), making sure they are well-organized so that other people can access the information they need about the organization’s past work.
- ☐ Consider compiling a scrapbook or file of key documents, pictures and artifacts (for example, signs from actions) that can communicate your organization’s history more directly.
- ☐ Make sure to incorporate a component about organizational history when you are orienting your successor.

Political Vision & Mission: How explicit is the political vision and mission of your organization? Does the entire staff share the vision and mission? Are the vision and mission alive and present in your day-to-day work?

What can you do to ensure that the political vision and mission are maintained after your transition?

GOAL: Ensure that the organization’s future work is grounded in a clear and well-documented political vision. Ensure that staff and lead members are grounded in those politics and are prepared to continue to move the organization’s vision forward.

POSSIBLE TASKS:

- ☐ Document the political thinking behind your organization’s work. Push yourself to be as clear and explicit as possible. It is easy to lose the political grounding of the organization when you are focused on transitioning the practical operations of your work. Remember to ground the process in the vision.

- ☐ Facilitate clear conversations about the organization’s political vision and mission with your staff and members. Give others space to question, challenge and change the vision. The goal is to ensure that there is organizational buy-in and investment from everyone.
- ☐ If necessary, conduct long-term staff studies and discussions to clarify difficult topics or explore contentious issues. Help the organization develop systems to understand and deepen its political vision.
- ☐ Clarify the bottom-line criteria for political analysis and vision to be used in the new director hiring process.
- ☐ Give the political vision document to the job candidates. Ask them for their reflections and feedback.
- ☐ Incorporate explicit discussions about the organization’s deeper political analysis and vision into your orientation process. Flag any issues or differences your successor has for future discussions within the organization.

Organizational Principles & Culture: How explicit are your organizational principles? Is the entire organization committed to those principles? Are those principles alive and present in your organizational culture?

How healthy and sustainable is your current organizational culture? Is your organizational culture based on clearly communicated principles of conduct, or is it reliant on the practice of specific individuals?

What can you do to ensure that the organizational principles and culture are maintained after your transition?

GOAL: Leave the organization with a clear and well-documented understanding of its principles and organizational culture.

POSSIBLE TASKS:

- ☐ Document your organizational principles to help promote a politically clear organization with a healthy organizational culture. Push yourself to be as clear and explicit as possible.
- ☐ Facilitate clear conversations about the organization’s principles and culture with staff and members. Give others space to question, challenge and change the principles and culture. The goal is to ensure that there is organizational buy-in and investment from everyone.
- ☐ If necessary, conduct long-term discussions to clarify difficult topics or explore contentious issues. Help the organization develop systems to reflect on and improve the organizational culture (for example, monthly group check-ins).
- ☐ Make these principles and the organizational culture explicit during interviews with the job candidates. Ask them for their reflections and feedback, exploring where they might have differences with your principles and what might be challenging for them about the organizational culture.
- ☐ Incorporate explicit discussions about the organization’s principles and culture into your orientation process. Flag any issues or differences your successor has for future discussions within the organization.

Planning Processes: How systematized and up-to-date are your organizational planning processes? Are these planning processes documented?

Strategic Planning

- ☐ Not Systematized
- ☐ Somewhat Systematized
- ☐ Totally Systematized
- ☐ Not Documented
- ☐ Somewhat Documented
- ☐ Totally Documented

Workplan Development

- ☐ Not Systematized
- ☐ Somewhat Systematized
- ☐ Totally Systematized
- ☐ Not Documented
- ☐ Somewhat Documented
- ☐ Totally Documented

Evaluation

- ☐ Not Systematized
- ☐ Somewhat Systematized
- ☐ Totally Systematized
- ☐ Not Documented
- ☐ Somewhat Documented
- ☐ Totally Documented

GOAL: Leave the organization with clearly-documented planning systems and thorough documentation of your past planning processes.

POSSIBLE TASKS:

- ☐ Reflect on how far you are into your previous strategic plan. Clarify when the next strategic planning process will begin. Assess whether you should transition before or after the completion of a new strategic plan, balancing the organizational stability that could come from completing a new strategic plan with the new vision and growth that could come from leaving prior to its development. Make this decision with other staff, members and your board.
- ☐ Document your workplan development and evaluation processes, including how often they should take place and what processes you go through to make program decisions. If you do not have these systems, develop them before you leave or, at the very least, communicate the lack of clear processes to your successor.
- ☐ Compile notes from past planning processes to give to your successor as samples.
- ☐ Make sure to explicitly communicate all of this information to your successor during the orientation process.

Structure: How effective is your current organizational structure, including division of labor and decision-making processes?

Is it reliant on particular individuals or is it an objectively solid structure? Explain.

Is everyone in the organization invested and supportive of the current organizational structure? Explain.

Is your structure well-documented?

GOAL: Leave the organization with a clear and well-documented organizational structure in which everyone knows his or her roles and responsibilities.

POSSIBLE TASKS:

- ☐ Document your organizational structure, including the division of labor and decision-making structures.
- ☐ Reflect with other stakeholders on the strengths and weaknesses of the current structure, including the implications of having different individuals fill the various roles. Transitions are a great opportunity to break old habits and make structural changes to strengthen the organization.
- ☐ Make the organizational structure clear during interviews with the job candidates. Ask them for their reflections and feedback, exploring what they think about the organizational structure and what might be positive or challenging for them.
- ☐ Make sure to explicitly communicate the organizational structure (including its strengths and challenges) to your successor during the orientation process.

Board: Do you have a functional board of directors? What support do they provide to the organization now?

- ☐ Fundraising
- ☐ Financial Management
- ☐ Program Support
- ☐ Organizational Development
- ☐ Coaching for Director

What role do you need them to play in facilitating an effective transition process?

- ☐ Increased Fundraising Support
- ☐ Organizational Development Support
- ☐ Run Hiring Process
- ☐ Coaching for Outgoing Director
- ☐ Coaching for Incoming Director

What support will the organization need from the board after the transition process?

- ☐ Fundraising
- ☐ Financial Management
- ☐ Program Support
- ☐ Organizational Development
- ☐ Coaching for Director

How does the board need to change to make that kind of support possible?

GOAL: Leave the organization with a strong and functional board of directors.

POSSIBLE TASKS:

- ☐ Based on your assessment, develop a plan for either recruiting new board members or increasing the involvement of your current board members.

- ❑ Conduct one-on-ones with board members and facilitate a board conversation to clarify what the organization needs from them during and after the transition. Get concrete commitments from them.
- ❑ Consider initiating a board “transition committee” that can play a leading role in the transition and hiring processes.
- ❑ Conduct regular check-ins with the transition committee or the board as a whole. They can give you valuable perspective on your process.
- ❑ Personally introduce your successor to the board, making sure the relationship gets off on the right foot.

Infrastructure: How strong is your organizational infrastructure on the following fronts? How well-documented are your systems?

Administration

- ☐ Weak Infrastructure ☐ Acceptable Infrastructure ☐ Strong Infrastructure
☐ Not Documented ☐ Somewhat Documented ☐ Totally Documented

Space Management

- ☐ Weak Infrastructure ☐ Acceptable Infrastructure ☐ Strong Infrastructure
☐ Not Documented ☐ Somewhat Documented ☐ Totally Documented

Technology

- ☐ Weak Infrastructure ☐ Acceptable Infrastructure ☐ Strong Infrastructure
☐ Not Documented ☐ Somewhat Documented ☐ Totally Documented

Information Management

- ☐ Weak Infrastructure ☐ Acceptable Infrastructure ☐ Strong Infrastructure
☐ Not Documented ☐ Somewhat Documented ☐ Totally Documented

GOAL: Leave your organization with a solid organizational infrastructure, including good administrative systems, space management policies, technological infrastructure and information management systems.

POSSIBLE TASKS:

- ❑ Based on your assessment, work to develop a solid infrastructure before you leave. For example, you may want to make sure you have clear systems for office administration, that the computer systems are stable and up-to-date, and that the organization has a clear and functional filing system.
- ❑ Make sure you have all administrative information well-documented and filed. In the best case, you should have an organizational operations manual developed before you leave. At the least, you should have a thorough filing system and compiled contact information for all relevant contacts (e.g., insurance providers, utility companies, landlord, etc.).
- ❑ Where necessary, document policies for infrastructure maintenance (e.g., all program staff must enter program participants and new members into the database within a week of contact). Facilitate organizational conversations to alter and adopt these policies.
- ❑ Make sure to explicitly communicate the state of the infrastructure and your management systems to your successor during the orientation process.

FUNDRAISING

Fundraising Planning: Do you have a solid fundraising planning system in place?

Is your fundraising plan up-to-date?

Set your fundraising goals:

Money to raise for current year 100 % of budget \$_____ Money amount
(during transition)

Money to raise for first year _____ % of budget \$_____ Money amount
(after transition)

Money to raise for transition _____ % of budget \$_____ Money amount
process itself

Cash reserve _____ % of budget \$_____ Money amount

What foundations can you approach to raise those funds?

Are there foundations you can approach specifically to support the transition? Individual donors?

GOAL: Leave your organization with strong fundraising planning systems, a solid fundraising plan for the year after your transition, and, if possible, a funding cushion to give your successor some space to learn and grow into her position.

POSSIBLE TASKS:

- ❑ Develop a fundraising planning system.
- ❑ Develop a solid fundraising plan for your transition year and for the first year after your transition.
- ❑ Turn your transition into a fundraising opportunity. Raise money for your transition, either from your current funders, who may have extra resources for organizational development, or from new funders. Plan a going-away event that can raise additional resources and build support for the new leadership.
- ❑ Aim to have a full year of funding committed to the organization before you leave; don't leave with less than six months of expenses raised. This will give your successor breathing room to learn the ropes of fundraising for your organization. Consider approaching funders for multi-year support to provide several years of cushioning for the organization.
- ❑ Give the job candidates copies of your fundraising plan (including the specific committed and pending resources) during the interview. Ask them for their reflections and how they would approach their first year of fundraising given your current status.
- ❑ Develop a tentative fundraising plan for your successor's first year, giving a solid vision for how they could raise the full organizational budget in that difficult first year. Although they should be given the power to transform the plan, it is important to leave the organization with that level of fundraising capacity.
- ❑ Make sure that your successor has copies of all grant agreements from your current funders and knows when grant reports will be due.

- ❑ Consider trying to raise additional resources to leave the organization with a cash reserve.

Relationships: What are the key foundation and individual donor relationships that you need to pass on to your successor?

What do you need to do to transfer those relationships?

GOAL: Leave your organization with thorough documentation of your past funder relationships. Ensure that your successor has started to develop relationships with your key funders.

POSSIBLE TASKS:

- ❑ If you do not already have a thorough filing system, make sure that you compile and clearly file electronic and hard copies of all of your past correspondence with your funders, including letters of inquiry, grants (including all attachments), grant agreements and reports. Your successor needs to be able to access all this information easily. If you’ve lost something, don’t be afraid to call your funders and ask for copies.
- ❑ Develop a thorough list of all past, current and prospective funders, including the foundation name, contact information, program officers, history of support, specific interests and any additional background information that would be helpful in navigating the relationship.
- ❑ If you want to take it to another level, you could build a “funder support circle” to support the organization through its transition. Asking people for their help to solidify the organization gets them invested in continuing their own support for the organization and in recruiting more support. It also helps them to build investment in the organization and not in you as an individual.
- ❑ Once you have hired your successor, send out a formal announcement to all of your supporters describing the new leadership.
- ❑ Thoroughly review all of your funding history verbally with your successor, giving them a sense of the individual program officers, the foundations as institutions and the broader funding world in which you operate (e.g., the difference between youth organizing funders and youth development funders, and how you try to work with each of them). Don’t forget to convey details like personality, pet peeves, personal quirks and political priorities!
- ❑ Walk through the filing system you developed, making sure they know where to access the materials they will need.
- ❑ Set up meetings with all of your major funders to personally introduce the new organizational leadership.
- ❑ Step back. Give your successor space to start doing the work as soon as possible, preferably while you are still in the training and orientation period.

Reputation: What is the reputation do you want to leave your organization with in the funding world?

How can you accomplish that?

GOAL: Leave your organization with a strong reputation in the fundraising world, dispelling traditional “transition fears” among your funders.

POSSIBLE TASKS:

- ❑ Work to make sure your programmatic work is clear and running strong during your last year. Promote the strength of the work in all of your materials.
- ❑ Notify your funders of your transition as soon as you either have a solid transition plan in place or have hired your successor (dependent on your approach). They should not hear about your transition from other people before you tell them.
- ❑ Many times, the reputation of an organization is confused with the reputation of the director; this is particularly true for founding directors. If this applies to your organization, strategize on how to transition your individual reputation to the organization as a whole. Some possible approaches:
 - Consider introducing major funders to the entire staff or asking them to come observe your organization in action at an event where you are not playing a lead role.
 - Name and challenge the individually-focused approach in your conversations and in your communications materials.
 - Develop strong organizational materials highlighting the organization’s mission and/or other leaders in the organization.
 - Organize a going-away event where you can publicly pass on leadership and highlight the qualifications of the new leadership.

Grant Templates: Do you have solid grant templates to pass on to your successor (both general support templates and program-specific templates)?

GOAL: Leave the organization with a solid set of grant templates that can be drawn on in future fundraising work.

POSSIBLE TASKS:

- ❑ Develop strong general support grant templates.
- ❑ Develop strong program-specific grant templates.
- ❑ Compile all basic grant attachments.
- ❑ Develop a clear and systematic filing system for these materials, making sure to clearly store both electronic and hard copies of all materials. Walk through this filing system with your successor as a part of the orientation process.

Skills: Are there specific fundraising skills that your successor will need to bring to the job?

What can you do to develop or strengthen your successor’s fundraising skills during the orientation and training period?

GOAL: Ensure that your successor’s fundraising capacity matches the needs of your organization.

POSSIBLE TASKS:

- ☐ Clarify the bottom-line criteria for fundraising capacity to be used in the hiring process, and ensure that these criteria will be demonstrated through interview questions and writing samples.
- ☐ After the hiring process, develop a tailored training plan to meet the new director’s specific needs. You can do some of this training, but remember that you can’t do it all. Think about outside resources you can draw on, especially formal fundraising training and the support of your board!

FINANCIAL MANAGEMENT

Budget Development: Do you have a clear and well-documented process for developing your yearly budgets?

Do you have a clear and well-documented process for getting organizational approval for your yearly budgets?

GOAL: Ensure that you leave the organization with a systematic budget development process, a solid budget for the current year, a proposed budget for the year after your transition and clearly organized documentation of your past budgets.

POSSIBLE TASKS:

- ☐ If necessary, develop a process for organizational budget development and approval. Make sure to consider what stakeholders need to give input in the budget development process, as well as in the process of gaining board approval for the final budget.
- ☐ Document this process clearly, and take it to the appropriate body in the organization for formal approval.
- ☐ Compile the budgets from the past five years and file them in a clear place.
- ☐ Make sure you have a solid budget for the year of your transition. Develop a proposed budget for the year following your transition to give your successor a rough idea of what to expect.
- ☐ After the hiring process, orient your successor thoroughly to the budget development process, to the past and current budgets, and to the proposed budget for the coming year.
- ☐ Make sure your successor is introduced to your bookkeeper and auditor. Give her the contact information for both people.

Cash Flow: Do you have a systematic way to track your cash flow (including both income and expenses)?

Is it up-to-date?

GOAL: Leave the organization a comprehensive cash flow for the current year and the year after your transition to ensure a sense of the financial health of the organization.

POSSIBLE TASKS:

- ☐ If necessary, develop a cash flow tracking tool.
- ☐ Make sure that your cash flow is thorough and up-to-date. Project income and expenses for the current year as well as for the year after your transition, including the expenses projected in your proposed budget and grants committed. This is the tool that will give your successor a solid idea about what to expect financially after your transition.
- ☐ Review this information with your board so they know the real status of the organization’s financial health before the transition. Clearly flag any potential issues.
- ☐ After the hiring process, orient your successor thoroughly both to the cash flow tracking tool as well as to the hard numbers in the cash flow. Have a realistic conversation about where potential financial problems could arise.

Financial Oversight: Do you have bookkeeping and financial oversight processes that ensure “checks and balances?”

Do you have both staff and board oversight of the organization’s financial management?

GOAL: Ensure that you leave the organization with a solid financial oversight process and clearly organized documentation of your financial past.

POSSIBLE TASKS:

- ☐ If you do not have a solid financial oversight process, consider contracting with an auditor or an outside bookkeeper to review the state of your financial systems, and to help you develop a strong oversight process. Make sure to get organizational buy-in to the processes you develop and to document those processes well.
- ☐ Compile copies of past audits for your successor to review. File these in a clear place.
- ☐ Compile copies of IRS documents, including your nonprofit status documents, for your successor to review. File these in a clear place.
- ☐ After the hiring process, orient your successor thoroughly both to the financial oversight process and to the compiled financial documents

PROGRAMMATIC WORK

Organizing Model: Is your organizing model developed into a systematic approach, or are you still in the process of developing your basic model? For example, do you have a regular yearly cycle for the phases of your organizing work? Do you have a systematic approach to campaign development?

How well documented is your organizing model? How well do other staff and leaders know the organizing model (versus knowing only the component they are responsible for)?

GOAL: Ensure that you leave the organization with a systematic and well-documented organizing model.

POSSIBLE TASKS:

- ☐ If your model is neither well-developed or well-documented, develop and document a basic model that captures the broad outlines of your work. Flag the outstanding questions and issues for your successor. Facilitate an organizational conversation to solidify a basic model.
- ☐ If your organizing model is well-developed but not documented, dedicate a significant amount of time to documenting the model. This can be done with other staff members and/or with lead members.
- ☐ Once the model is systematized and documented, ensure that the staff and member leadership are oriented to the overall model and to the role their work plays in the overall organizing. Encourage them to keep the model alive, growing and changing.
- ☐ Make the organizing model clear during interviews with the job candidates. Ask them for their reflections and feedback, exploring what they think about the model and what they might be able to do to move it forward.
- ☐ Make sure to explicitly communicate the organizing model to your successor during the orientation process. Encourage them to keep the model alive, growing and changing.

Program Planning: Do you have regular processes for program planning?

Are those planning processes well-documented?

GOAL: Ensure that you leave the organization with clear program planning and evaluation processes.

POSSIBLE TASKS:

- ☐ Document your program planning processes. This can be done together with other staff members and/or with lead members.
- ☐ Once the planning processes are systematized and documented, ensure that the entire staff and member leadership are oriented to the processes.
- ☐ Compile documentation from past program planning sessions. File these in a clear place.
- ☐ Make sure to explicitly communicate the program planning process to your successor during the orientation.

Organizational Relationships: How well do your staff and lead members understand the broader field of youth organizing, both locally and nationally?

How well do they understand the broader social justice movement?

Does your organization have formal alliances with other organizations? Do you have informal, friendly relationships with other organizations?

Formal Alliances Informal Relationships

Circle the relationships that rely primarily on you,

What can you do to pass on those relationships?

GOAL: Ensure that your organization has an explicit and intentional network of organizational relationships, and that you have passed on your relationships to other people in the organization.

POSSIBLE TASKS:

- ☐ Facilitate discussions with staff and leading members to develop collective knowledge and a shared assessment of the broader field of youth organizing and the social justice movement. Don’t worry about taking up too much space in these meetings; it is likely that you hold a great deal of knowledge that other people need to be able to access.
- ☐ Identify which organizational relationships are important to maintain. If those relationships are primarily held by you, decide who else in the organization can develop a relationship with those key organizations. Actively introduce other staff members and youth leaders to people at these ally organizations.
- ☐ Thoroughly document the information about organizational relationships and your analysis of the broader field, and file it clearly. Make sure this includes names and contact information for key allies.
- ☐ Share the information about organizational relationships and your analysis of the broader field during the orientation time with your successor.
- ☐ Personally introduce your successor to the primary contacts at your key organizational allies. Ask your allies to actively engage in maintaining a close relationship with the organization after you leave.

STAFF DEVELOPMENT

Political Grounding: Do your staff and lead members have a deep understanding of the fundamental political vision underlying your work?

Where is their political vision strong, and where does it need work?

Practical Skills: Is your staff and youth leadership fully prepared to carry out the organizing work on their own?

Where are their organizing skills strong, and where do they need work?

GOAL: Ensure that the new director, the staff and lead members are fully prepared, both politically and practically, to carry out the work of the organization after you leave.

POSSIBLE TASKS:

- ☐ Consider implementing a regular internal study process to help staff and members develop a deeper understanding of the organization’s political analysis, and to develop their capacity to keep moving the political vision forward after you go.
- ☐ Identify organizing skills trainings that will develop the organizing capacity of your staff and lead members.
- ☐ Help staff and lead members identify veteran organizers and movement leaders who can mentor them in their future development and growth.
- ☐ During the orientation with your successor, make sure you communicate your assessment of the staff and members’ political development and practical organizing skills.

Organizational Culture & Morale: What is the current state of your organization’s culture?

How is your organizational morale? Do you predict any bumps in organizational morale after your transition?

Are there any underlying issues that have been brewing that may arise later?

Are there any people who have issues in their practice that undermine the organizational culture and morale?

Cohesion & Continuity: Make a list of your staff members and how long they have been at the organization. Circle the staff members who are familiar with the organization’s culture, practices and organizing work. Then, list the ways these staff members can play a role in the transition process.

<i>Staff Members</i>	<i>Tenure at Organization</i>	<i>Role in Transition Process</i>
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How long are your current staff members committed to staying at the organization? Do you anticipate any major staffing transitions in the year after your transition?

Do you have a clearly documented and replicable orientation plan to ensure that new staff members are introduced to the organization’s political vision, organizing model and organizational culture?

GOAL: Ensure that you leave the organization with a healthy organizational culture and high morale. Ensure that you leave the organization with staff members who are familiar with the organization’s work and who are committed to staying at the organization long enough to help sustain the organization through the transition.

POSSIBLE TASKS:

- ☐ Directly address any underlying issues that have the potential to explode after you leave. Make sure these issues are resolved and that the organization learns from those experiences.
- ☐ Spend time intentionally building the organizational morale, ensuring that peoples’ fears are addressed, and that you build on peoples’ excitement for the future.
- ☐ Conduct formal evaluations with all of your staff members, making sure to give them clear feedback on their areas of strength and areas for growth. Have explicit conversations with everyone about how long they are willing to commit to stay with the organization, and what you think they can contribute during the transition.
- ☐ Develop a well-documented and replicable orientation model that communicates your organization’s political vision, organizing model and organizational culture.
- ☐ Explicitly address “insider/outsider” issues with your staff and membership to ensure that they are welcoming to the incoming director and open to new leadership.
- ☐ Make sure that you communicate your evaluation of the organization’s culture to your successor during the orientation. Explicitly raise any issues that may develop in the future. Also, make sure you clearly lay out the experience and commitments of staff members who are staying with the organization.

Tool 3

TRANSITION WORKPLANNING WORKSHEETS

SETTING THE GOALS FOR YOUR TRANSITION

Your workplan will look different if you are planning to hire someone from inside of the organization compared to hiring from outside of the organization. In most instances, decisions about an internal hire will need to be made earlier in the process, and you would institute a longer training and shadowing period. For external hires, decisions would be made later in the process, and a more traditional training and orientation period of one to two months would follow. Given these differences, two alternate planning forms follow: one for external hires and one for internal hires.

OUTSIDE HIRE PHASE 1: INITIAL REFLECTION & PLANNING TIMELINE: 1 - 2 MONTHS	INSIDE HIRE PHASE 1: INITIAL REFLECTION, PLANNING & HIRING TIMELINE: 1 - 2 MONTHS
<p>GOAL:</p> <p>Your goal in this phase is to gain clarity on the state of the organization and to develop a solid transition plan that will leave the organization in a good place.</p>	<p>GOAL:</p> <p>Your goal in this phase is to gain clarity on the state of the organization, to identify your successor from inside the organization and to develop a solid transition plan that will leave the organization in a good place.</p>
<p>TASKS:</p> <p>(1) Complete your own reflection and assessment.</p> <p>(2) Coordinate reflection and planning discussions with your members, staff and board.</p> <p>(3) Coordinate organizational processes to determine what leadership structure will make sense after you transition (executive director, co-directorship, leadership circle).</p> <p>(4) Develop a transition plan tailored to the needs of your organization, including plans for organizational development, fundraising, hiring your successor and orientation.</p> <p>(5) Identify any personal issues that may come up for you in your transition.</p>	<p>TASKS:</p> <p>(1) Complete your own reflection and assessment work.</p> <p>(2) Coordinate reflection and planning discussions with your members, staff and board.</p> <p>(3) Coordinate an organizational process to determine what leadership structure will make sense after you transition (executive director, co-directorship, leadership circle).</p> <p>(4) Coordinate organizational processes to clarify the criteria for the hiring process. Develop a clear hiring process that incorporates buy-in from key stakeholders in the organization.</p> <p>(5) Hire your successor from inside the organization.</p> <p>(6) Develop a transition plan tailored to the needs of your organization and your successor that includes organizational development, fundraising and orienting your successor. Identify any personal issues that may come up for you in your transition.</p>

OUTSIDE HIRE PHASE 2: PLANNING & INFRASTRUCTURE DEVELOPMENT TIMELINE: 6 - 10 MONTHS	INSIDE HIRE PHASE 2: INITIAL TRAINING & INFRASTRUCTURE DEVELOPMENT TIMELINE: 3 - 6 MONTHS
<p>GOAL:</p> <p>Your goal in this phase is to carry out the bulk of the organizational development and fundraising work necessary to leave the organization in a good place.</p>	<p>GOAL:</p> <p>Your goal in this phase is to carry out the bulk of the organizational development and fundraising work necessary to leave the organization in a good place and to begin formal training of your successor.</p>
<p>TASKS:</p> <p>(1) Document your organizational practices into solid organizational systems (budget development, cash flow, fundraising planning, program planning).</p> <p>(2) Document your organizational principles, political analysis and structure. Organize collective conversations and studies to gather input, and to ensure that these components are understood and shared.</p> <p>(3) Raise money, and plan to raise more money! This is the period when you need to make sure the organization has enough resources to make it through your transition. Plan well enough so your successor has a financial cushion and knows what fundraising work to do in her first six months.</p> <p>(4) Compile all organizational documents (past budgets, financial information, IRS documents, notes from past program planning meetings, curriculum and so on) and file them clearly.</p> <p>(5) Coordinate organizational processes to clarify criteria for the hiring process. Develop a clear hiring process that incorporates buy-in from key stakeholders.</p> <p>(6) Work through whatever personal issues may be coming up for you about your impending transition.</p>	<p>TASKS:</p> <p>(1) Document your organizational practices into solid organizational systems (budget development, cash flow, fundraising planning, program planning).</p> <p>(2) Document your organizational principles, political analysis and structure. Organize collective conversations and studies to gather input, and to ensure these components are understood and shared.</p> <p>(3) Raise money, and plan to raise more money! This is the period when you need to make sure the organization has enough resources to make it through your transition. Plan well enough so your successor has a financial cushion and knows what fundraising work to do in her first six months.</p> <p>(4) Compile all organizational documents (past budgets, financial information, IRS documents, notes from past program planning, curriculum) and file them clearly.</p> <p>(5) Ensure that your successor go through formal training to develop the skills necessary to lead the organization. These trainings can either be conducted by you or through outside institutions. Make sure these trainings cover the skills needed to lead the organizationally politically and programmatically (organizing skills training, political analysis), as well as to build a solid nonprofit organization (fundraising, financial management, supervision).</p> <p>(6) Work through whatever personal issues may be coming up for you about your impending transition.</p>

OUTSIDE HIRE PHASE 3: HIRING PROCESS & INFRASTRUCTURE DEVELOPMENT TIMELINE: 2 - 3 MONTHS	INSIDE HIRE PHASE 3: SHADOWING & INFRASTRUCTURE DEVELOPMENT TIMELINE: 6 - 12 MONTHS
<p>GOAL:</p> <p>Your goal in this phase is to identify and hire a strong candidate to take over your position.</p>	<p>GOAL:</p> <p>Your goal during this phase is to complete the organizational development and fundraising work necessary to leave the organization in a good place. You will also begin the process of having your successor take up organizational leadership.</p>
<p>TASKS:</p> <p>(1) Publicize the position, and engage in one-on-one recruitment with key prospects.</p> <p>(2) Conduct interview processes that allow for participation of key stakeholders and that incorporate honest dialogue about potentially controversial or difficult topics.</p> <p>(3) Make a hiring decision using a process that incorporates input from key stakeholders.</p> <p>(4) Develop an orientation plan based on the specific needs of your hire(s).</p> <p>(5) Wrap up any outstanding work from the last phase.</p> <p>(6) Work through whatever personal issues may be coming up for you about your impending transition.</p>	<p>TASKS:</p> <p>(1) Wrap up any outstanding organizational development and fundraising work from the last phase.</p> <p>(2) Review all of your organizational documentation with your successor.</p> <p>(3) Spend time reviewing your organizational systems and plans, including program planning, financial and fundraising planning, and strategic planning.</p> <p>(4) Spend a serious amount of time in dialogue with your successor about the more intangible aspects of the organization: organizational history, principles, political analysis, culture and so on.</p> <p>(5) Have your successor shadow you as you carry out your ongoing organizational leadership work. Make sure to have follow-up conversations after each shadowing experience to process what happened and what they learned. Over time, have your successor begin to take on tasks themselves.</p> <p>(6) Work through whatever personal issues may be coming up for you about your impending transition.</p>

OUTSIDE HIRE PHASE 4: ORIENTATION PROCESS TIMELINE: 1 - 2 MONTHS	INSIDE HIRE PHASE 4: FINAL TRANSITION TIMELINE: 1 - 2 MONTHS
<p>GOAL:</p> <p>Your goal in this phase is to provide adequate training and support to the new director.</p>	<p>GOAL:</p> <p>Your goal in this phase is to hand the reins over to your successor, serving as a coach to them as they formally assume leadership.</p>
<p>TASKS:</p> <p>(1) Review all of your organizational documentation with your successor.</p> <p>(2) Spend time reviewing your organizational systems and plans, including program planning, financial and fundraising planning, and strategic planning.</p> <p>(3) Spend a serious amount of time in dialogue with your successor about the more intangible aspects of the organization: organizational history, principles, political analysis, culture and so on.</p> <p>(4) Announce your transition (if you haven’t done so already). Introduce your successor to relevant organizational stakeholders, organizational allies and funders.</p> <p>(5) Step back, and let go!</p>	<p>TASKS:</p> <p>(1) Have your successor fully assume the work of organizational leadership, shadowing them as an observer and coach. Make sure to have follow-up conversations after each experience to process what happened and what they learned.</p> <p>(2) Announce your transition (if you haven’t done so already), and introduce your successor to relevant organizational allies and funders.</p> <p>(3) Step back, and let go!</p>

TRANSITION WORKPLAN: HIRING FROM OUTSIDE

PHASE	PHASE 1 : INITIAL REFLECTION & PLANNING		PHASE 2: PLANNING & INFRASTRUCTURE DEVELOPMENT		PHASE 3: HIRING & INFRASTRUCTURE DEVELOPMENT		PHASE 4: ORIENTATION PROCESS	
DATES	GOALS	METHODS	GOALS	METHODS	GOALS	METHODS	GOALS	METHODS
ORGANIZATIONAL DEVELOPMENT								
FUNDRAISING								
FINANCIAL MANAGEMENT								
PROGRAMMATIC WORK								
STAFF DEVELOPMENT								

TRANSITION WORKPLAN: HIRING FROM INSIDE

PHASE	PHASE 1: INITIAL REFLECTION, PLANNING & HIRING	PHASE 2: INITIAL TRAINING & INFRASTRUCTURE DEVELOPMENT	PHASE 3: SHADOWING & INFRASTRUCTURE DEVELOPMENT	PHASE 4: FINAL TRANSITION
DATES				
REFLECTIONS & ASSESSMENTS				
ORGANIZATIONAL DIALOGUES & PROCESSES				
SHADOWING, TRAININGS & LEADERSHIP DEVELOPMENT				
DOCUMENTATION & SYSTEMS DEVELOPMENT				
FUNDRAISING				
EXTERNAL COMMUNICATIONS				

Tool 4

ORIENTATION PLANNING

You will have limited time to work together with the new director. It is important that you plan that time well. Following is one process you can use to plan an effective orientation.

STEP A: DEVELOP A LIST OF TOPICS TO ADDRESS AND TASKS TO ACCOMPLISH DURING THE ORIENTATION PERIOD.

- Tools:
- Sample List of Orientation Topics

Blank List of Orientation Topics

STEP B: DEVELOP A BROAD WEEK-BY-WEEK TIMELINE TO ADDRESS DIFFERENT TOPICS AND TASKS.

- Tools:
- Sample Week-by-Week Orientation Timeline

Blank Week-by-Week Orientation Timeline

STEP C: DEVELOP DETAILED WEEKLY SCHEDULES BASED ON THE WEEK-BY-WEEK TIMELINE.

- Tools:
- Sample Transition Training Schedule: Week 1

Blank Transition Training Schedule: Week 1

STEP A: SAMPLE LIST OF ORIENTATION TOPICS

CATEGORY	TOPIC	SCHEDULED?
MATERIALS TO READ	Supervision Manual	<input type="checkbox"/>
	Personnel Policies Manual	<input type="checkbox"/>
	Curriculum Manuals	<input type="checkbox"/>
	Organizing Model	<input type="checkbox"/>
	Staff Study Readings	<input type="checkbox"/>
FUNDRAISING	Map Funder World	<input type="checkbox"/>
	Past, Present and Potential Funders	<input type="checkbox"/>
	Fundraising Principles, Methods and Strategies	<input type="checkbox"/>
	Fundraising Planning Systems	<input type="checkbox"/>
	Current Fundraising Plan	<input type="checkbox"/>
	Role of Fundraising Committee	<input type="checkbox"/>
	Grassroots Fundraising	<input type="checkbox"/>
FINANCIAL MANAGEMENT	Budget Development Process	<input type="checkbox"/>
	Financial Oversight (program budgets, cash flow, financial statements, board accountability)	<input type="checkbox"/>
	Current Year Budget and Next Year Budget	<input type="checkbox"/>
	Bookkeeping	<input type="checkbox"/>
MISSION & PROGRAM	Organizational Mission and Niche	<input type="checkbox"/>
	Mapping the Field	<input type="checkbox"/>
	Program Overview	<input type="checkbox"/>
	Program Gaps, Strengths and Weaknesses	<input type="checkbox"/>
	Organizational Relationships	<input type="checkbox"/>
INFRA-STRUCTURE & ADMIN-ISTRATION	Office Administration	<input type="checkbox"/>
	Technology Assessment	<input type="checkbox"/>
	Website Management	<input type="checkbox"/>
	Space Management	<input type="checkbox"/>
	Filing Systems	<input type="checkbox"/>
SUPERVISION	Organizational and Staff Culture	<input type="checkbox"/>
	Supervision Philosophy and Methods	<input type="checkbox"/>
	Practice Supervision	<input type="checkbox"/>
MISCELLA-NEOUS ISSUES	Future Directions	<input type="checkbox"/>
	Outstanding Organizational Development Issues	<input type="checkbox"/>
	Methods of Leadership	<input type="checkbox"/>
	Personal Leadership Development Plan	<input type="checkbox"/>
	Working Together Well During Orientation Period	<input type="checkbox"/>
	How should the departing director relate to the organization after the transition?	<input type="checkbox"/>

CATEGORY	TOPIC	SCHEDULED?
WHOLE STAFF DIALOGUES & TRAININGS	Working Together	<input type="checkbox"/>
	Staff Lunch	<input type="checkbox"/>
	Staff Study	<input type="checkbox"/>
	Mapping the Field	<input type="checkbox"/>
ONE-ON-ONE MEETING WITH BOARD, STAFF & LEAD MEMBERS	Program Staff 1	<input type="checkbox"/>
	Program Staff 2	<input type="checkbox"/>
	Program Staff 3	<input type="checkbox"/>
	Lead Member 1	<input type="checkbox"/>
	Lead Member 2	<input type="checkbox"/>
	Bookkeeper	<input type="checkbox"/>
	Technology Support	<input type="checkbox"/>
	Board of Directors	<input type="checkbox"/>
ONE-ON-ONE MEETINGS WITH ORGANIZATIONAL ALLIES	Ally Organization 1	<input type="checkbox"/>
	Ally Organization 2	<input type="checkbox"/>
	Ally Organization 3	<input type="checkbox"/>
	Ally Organization 4	<input type="checkbox"/>
	Ally Organization 5	<input type="checkbox"/>
	Ally Organization 6	<input type="checkbox"/>
	Ally Organization 7	<input type="checkbox"/>
FUNDER MEETINGS	Funder A	<input type="checkbox"/>
	Funder B	<input type="checkbox"/>
	Funder C	<input type="checkbox"/>
	Funder D	<input type="checkbox"/>
	Funder E	<input type="checkbox"/>
HANDS-ON WORK	Develop Next Fundraising Plan	<input type="checkbox"/>
	Write Letter of Inquiry	<input type="checkbox"/>
	Write Grant	<input type="checkbox"/>
	Write Grant Report	<input type="checkbox"/>
	Develop Next Year Workplan	<input type="checkbox"/>
	Update Cash Flow	<input type="checkbox"/>

STEP B: BLANK LIST OF ORIENTATION TOPICS

[illegible]

	CATEGORY	TOPIC	SCHEDULED?
	WHOLE STAFF DIALOGUES & TRAININGS		<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
	ONE-ON-ONE MEETING WITH BOARD, STAFF & LEAD MEMBERS		<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
	ONE-ON-ONE MEETINGS WITH ORGA-NIZATIONAL ALLIES		<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
	FUNDER MEETINGS		<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
	HANDS-ON WORK		<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

STEP B: SAMPLE WEEK-BY-WEEK ORIENTATION TIMELINE

PHASE	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6
TRAININGS & CONVERSATIONS	Working Together Self Assessment Fundraising Planning Budget Development Fundraising Status Budget Financial Tracking Organizational Principles & Culture	Overall check-in Organizational Mission Program Overview Program Assessment Methods of Leadership Approach to Fundraising Map Funding World Files & Database	Overall check-in Organizing Model Curriculum Overview Organizational Alliances Database Training Past, Present & Potential Funders Grassroots Fundraising	Overall check-in Technology System Website Space Management Board Fundraising Committee Grant Templates	Overall check-in Future Directions for Organizations Organizational Development Issues Evaluate Organizing Model & Curriculum Develop Workplan for Next Year Future Leadership Development Develop Next Year Fundraising Plan	Overall check-in Final Details & Wrap-Up Evaluation
MEETINGS & EVENTS	Staff Meeting Staff Study Funder A Meeting	Staff Meeting Staff Retreat Board Meeting	Staff Meeting Ally Org 1 Meeting Funder B Meeting	Staff Meeting Funder C Meeting Ally Org 2 Meeting	Staff Meeting Funder D Meeting Director Transition Public Event	Staff Meeting Funder E Call Ally Org 3 Meeting
SUPERVISION TRANSITION	Discuss Supervision Philosophy	Sit in on Supervision Process Supervision Dynamics	Sit in on Supervision Process Supervision Dynamics	Run Supervision (observed) Process Supervision Dynamics	Run Supervision (observed) Process Supervision Dynamics	Run Supervision (alone) Process Supervision Dynamics
FORMER DIRECTOR TASKS	Funder Announcement Prep for Staff Study Program Transition	Prep for Staff Retreat Write Grant Proposal Program Transition	Prep for Staff Study Compile Curriculum Program Transition			Final Details & Wrap-Up Clean Desk & Computer
NEW DIRECTOR TASKS	Read Proposals Read for Staff Study Read Program Materials	Write Grant Report Review Grant Proposal Update Cash Flow	Write Letter of Inquiry Develop Workplan Read Curriculum	Draft Grant Proposal Research New Funders Develop Workplan	Finish Grant Proposal Read Curriculum	

STEP B: BLANK WEEK-BY-WEEK ORIENTATION TIMELINE

WEEK 6					
WEEK 5					
WEEK 4					
WEEK 3					
WEEK 2					
WEEK 1					
PHASE	TRAININGS & CONVERSATIONS	MEETINGS & EVENTS	SUPERVISION TRANSITION	FORMER DIRECTOR TASKS	NEW DIRECTOR TASKS

STEP C: SAMPLE TRANSITION TRAINING SCHEDULE: WEEK 1

MONDAY	
11 - 11:30	Check-In
11:30 - 12:30	Conversation: Working Together Productively
12:30 - 1:30	Lunch
1:30 - 2:30	Review Orientation Training Plan
2:30 - 3	Review & Discuss Organizational Principle
3:30 - 4:30	Discuss Organizational Culture
4:30 - 5	Travel
5 - 6	Introduce Database & Fundraising Planning System
TUESDAY	
10 - 12	Staff Meeting
12 - 1	Lunch
1 - 1:30	Current Year Fundraising Plan & Status
1:30 - 3	New Director Self-Assessment
3 - 3:30	Next Year Fundraising Plan & Status
3:30 - 6	Open Work Time: Read materials, Get settled, etc.
WEDNESDAY	
10 - 1	Staff Study: Immigrant Rights Movement & Youth Participation
1 - 2	Lunch
2 - 3	Budget Development System
3 - 4	Review Current Year Budget
4 - 4:30	Discuss Next Year Budget
4:30 - 6	Open Work Time
THURSDAY	
10 - 11	Open Work Time
11 - 12	Financial Tracking Systems: Cash Flow, Financial Reports, Board Accountability
12 - 12:30	Book-keeping: Meet book-keeper, Discuss expectations
12:30 - 1:30	Lunch
1:30 - 2:30	Filing Systems: Electronic & Hard Copy
2:30 - 6	Open Work Time
FRIDAY	
10 - 11	Prep for Funder Meeting
11 - 1	Funder Meeting
1 - 2	Lunch
2 - 3	Open Work Time
3 - 5	Supervision Philosophy & Systems
4 - 6	Discuss Current Staff Dynamics

STEP C: BLANK TRANSITION TRAINING SCHEDULE: WEEK 1

MONDAY	
11 - 11:30	
11:30 - 12:30	
12:30 - 1:30	
1:30 - 2:30	
2:30 - 3	
3:30 - 4:30	
4:30 - 5	
5 - 6	
TUESDAY	
10 - 12	
12 - 1	
1 - 1:30	
1:30 - 3	
3 - 3:30	
3:30 - 6	
WEDNESDAY	
10 - 1	
1 - 2	
2 - 3	
3 - 4	
4 - 4:30	
4:30 - 6	
THURSDAY	
10 - 11	
11 - 12	
12 - 12:30	
12:30 - 1:30	
1:30 - 2:30	
2:30 - 6	
FRIDAY	
10 - 11	
11 - 1	
1 - 2	
2 - 3	
3 - 5	
4 - 6	

Chapter 2

NEGOTIATING RELATIONSHIPS
WITH PARENT ORGANIZATIONS

REFLECTIONS ON NEGOTIATING RELATIONSHIPS WITH PARENT ORGANIZATIONS

As mentioned in the Introduction, three of the 10 Roots Initiative groups have undergone separations with the larger social justice organizations under which they were founded or sponsored. Two out of these three groups actually made that separation during the course of the Roots Initiative. In each instance, those involved in the separation considered the experience contentious and draining. To be sure, these were not steadily planned organizational spin-offs that took place over a few years; and they were not based on amicable, mutual agreements among different stakeholders. Rather, they were often the result of sharp disagreements that flared up over a concentrated period of time. While such disagreements could appear to be interpersonal (that is, those in leadership just can’t get along), more often than not they were rooted in deeper political questions of power and self-determination/autonomy. Such questions are pronounced for youth organizing (YO)—a sector all too easily categorized as the junior partner to broader social justice movements. YO is often viewed as the sector to carry the “youth portion” of movements for educational justice, environmental justice, racial justice, etc. This raises the question of whether YO can claim to be its own, distinct social justice field, one that serves a specific constituency (youth) around a specific set of oppressions and systemic inequalities (e.g., ageism, disenfranchisement, institutional neglect and miseducation, etc.)? Or, does YO fall short of the criteria needed to claim field status, proving itself merely an effective *model* of organizing, one that simply works in the service of broader social justice fields?

This is an ongoing discussion/debate among YO practitioners. Should YO projects maintain a level of autonomy from their parent organizations? And, though this chapter will not resolve the question, we nevertheless raise it here to reveal the deeper political tensions that often exist between YO projects and the social justice groups they are connected to.

A parent organization is a multi-issue, multigenerational social justice organization that to varying degrees oversees (administratively, fiscally and programmatically) an in-house YO project. Outside of the three Roots Initiative groups that split from parent organizations, the other seven groups are either presently in an existing relationship with a parent organization (4 groups), or were originally founded as “stand-alone” YO groups (3 groups). One of these stand-alone groups maintains a fiscal sponsor relationship with a larger nonprofit. (See Figure 1 for further explanation of YO organizational models and relationships).

The goal of this chapter is to explore factors that make for sustainable relationships between YO projects and parent organizations. This is not to suggest that YO projects and parent organizations should always remain joined; sustainability does not necessarily mean staying together. It could also mean both parties agree to a spin-off in order to preserve or advance a long-term political relationship. Here, sustainability refers to the carrying out of a healthy organizational process where all parties can reach common analysis and agreement. This includes a shared vision on the distinct purpose/roles of youth leaders and adult leaders in the movement, a shared analysis on how power operates between youth and adults, and clearly stated organizational policies and processes that allow groups to successfully implement their vision and analysis.

This chapter is informed by experiences among groups that have undergone difficult separations with parent organizations. In attempt to highlight best practices, it also draws heavily on the lessons learned among groups that are presently in sustainable relationships with parent organizations. Among the Roots Initiative organizations, the Bronx-based Sistas and Brothas United (SBU) provides an important example of how to optimize the political relationship between a youth organizing group and a

parent organization. Additional reflections are provided by groups outside of the Roots Initiative, including Youth Making a Change (a project of Coleman Advocates for Children and Youth) and Asian Pacific Islander Youth Promoting Advocacy and Leadership (AYPAL).

While each situation presents different conditions and contexts, there were some common lessons learned by groups in the Roots Initiative, as well as those interviewed beyond the Initiative.

What follows is a discussion of those common threads and lessons. These reflections are followed by several tools that can be utilized by YO projects and parent organizations to help groups weigh the pros and cons of staying together or separating.

FIGURE 1.

OVERVIEW OF YO ORGANIZATIONAL MODELS AND RELATIONSHIPS

1. ***Stand-Alone Youth Organizing:*** YO is the overall mission and project of the organization; the organization was initially founded with YO at the center. The youth organization has its own nonprofit structure, which it manages independently.
2. ***Youth Organizing within Intergenerational Social Justice Organizing:*** A youth organizing component is created within an intergenerational and multi-issue social justice organization. At a certain point in its history, the social justice organization recognizes the advantages of incorporating a YO project that can serve/enhance the broader mission of the organization.
3. ***Youth Organizing within a Social Justice Youth Development Organization:*** A youth organizing component is created within a youth development organization that recognizes the ways in which YO, as a form of youth “civic engagement,” successfully meets the desired outcomes of youth development.
4. ***Fiscal Sponsorship/Project Incubation:*** This model is similar to stand-alone youth organizing in that YO is the overall mission and programmatic focus of the organization. In this model, the youth organization does not have its own nonprofit structure, but receives fiscal sponsorship from another organization, often including financial management, and sometimes including tasks like payroll processing, insurance coverage and space provision. Some organizations also receive technical assistance in organizational development from their sponsors to develop the capacity for independence; this characterizes the “incubation” model.

THE STRUCTURAL IS POLITICAL

On the surface, discussions about separation can take on a purely structural or logistical tenor. Indeed, administrative issues such as how resources are raised, managed and distributed, how YO project staff are supervised, or how decision making happens between the two entities are issues that often foment discussion on separation. At other times, discernable cultural/generational differences between YO members and parent organization members arise as the source of the problem. These structural and cultural issues often mask deeper political questions on the role of youth and the YO practice within the broader social justice movement: To what extent should the YO project focus on building the autonomous power of a youth base and constituency (the presumption being that youth constitute a distinct category of oppression and resistance)? Or conversely, to what extent should the in-house YO project exist only to serve the broader mission of the parent organization?

To underscore the lesson that political questions are the at the root of structural questions, its worth mentioning here that from its research the Roots Initiative could not point to a single preferred, let alone ideal, model when it came to best maintaining a positive relationship between a YO project and its parent organization. From interviews conducted among several YO groups and parent organization staff members (including non-Roots groups), it was discovered that the same model, when implemented in different contexts, yielded drastically different outcomes.

For instance, for some YO projects, maintaining a close relationship with a parent organization represents a near-ideal situation, where the latter helps shape the strategic direction, leverages its political influence toward the YO campaign, and provides resources for the development of political education and organizing training. A good example of this is the Bronx-based YO project Sistas and Brothas United (SBU), which was founded by and is housed within the Northwest Bronx Community and Clergy Coalition (NWBCCC). In recent years, SBU has weighed the pros of staying or separating with the NWBCCC. In the end, SBU determined that the advantages exceed the constraints.

“SBU has a greater opportunity to take advantage of the relationship [with a parent organization]. We can get more direct support [from the NWBCCC],” said Mustafa Sullivan, program director of SBU. The advantages, according to Sullivan, include name recognition through the affiliation, office space, the sharing of administrative and financial management staff, and most importantly, leveraging political support cultivated by the NWBCCC (particularly among elected officials).

Yet, for other YO projects with a similar relationship to their parent organization, the results were far less promising. In more than one instance, a YO project described its ex-parent organization as overly controlling when it came to determining the strategic direction of youth organizing. In more than one instance, a YO project challenged its ex-parent organization on being less-than-transparent about organizational resources, with YO leaders believing that funds allocated to the project did not match the programmatic and fundraising contributions made by youth leaders and YO staff. In these instances, the parent organizations were portrayed as opportunistic, lacking a firm understanding of the role of YO, and invested in the YO project only insofar as it advanced the broader organizational agenda. When the YO project began to assert itself and demand more independence in determining its strategy and organizational development plan, the parent organization deemed such moves a threat. Upon reaching this impasse, opposing sides often propose solutions for structural reform, that is, tweaking (or creating anew) structures and policies in hopes to achieving a compromise, if not full consensus. But, these resolutions cannot be offered in a vacuum. By addressing issues of structure and policy alone, such processes often fall short of delving into the political issues at the root of the tensions. In other words, a focus on structure and policy alone cannot substitute for clarity of vision and analysis.

IDENTIFYING THE POLITICAL ISSUES

It’s true enough that tensions between YO projects and parent organizations are inevitable. And, though it may seem that the energy organizations expend on resolving these internal matters can detract from the external political work of organizing, it is important to understand these processes as “political” in their own right. SBU’s Sullivan recalls that when the YO project was first developed within the NWBCCC, there were initial tensions between the youth and adult organizers. According to Sullivan, “We used to have to fight for the space to be heard. Some of the adult members and board members would dismiss the work and say, ‘What are they really doing? Are they really organizing?’”

In response to what SBU perceived to be the dismissive posture of leaders in the parent organization, SBU members could have suggested structures and policies to address issues of ageism and the marginalizing of youth within social justice movements. But such processes, though on the surface useful, would not yield a deeper political camaraderie between youth and adult leaders. If the adults were going to buy-in to the youth organizing idea, something else was in order. According to Sullivan,

the shift finally came when SBU members began sharing their political education and leadership development modules with NWBCCC members. SBU’s approach to developing new leaders through consistent political education and training provided the NWBCCC with new insights on how to conduct its own leadership development. Moreover, it suggested a clear and mutually beneficial role for YO within a broader social justice organization: the YO component does the important work of ensuring the development of new leaders, of filling the leadership pipeline.

“Today, the NWBCC learns from us,” Sullivan said. “After seeing the impact we can make with our youth members, the whole organization integrated political education into its leadership development plan.”

In the case of SBU, its structural relationship to the NWBCCC never underwent major restructuring nor did it get mired in a list of organizational policy reforms. Yet, the NWBCCC’s political understanding on the role of the YO project reached a new, positive stage. The lesson here is that developing the most viable or successful model is not quite as important as working toward an organizational vision and analysis of YO within the broader social justice framework. In specific terms, this shared vision and analysis includes:

- 1. A delineation of the respective **purposes** of the YO component and the parent organization (how do they complement one another?)
- 2. Recognition of the distinct ways in which **power** operates within and between both sections of the organization.
- 3. The development of a clear organizational **process** (for decision making and evaluation) that puts into practice agreements on purpose and power.

Below, we elaborate on importance of these “3-Ps.”

THE 3 P’S: PURPOSE, POWER, PROCESS

How relationships between YO projects and parent organizations succeed and why they sometimes fail has much to do with the time and attention the organization, as a whole, gives to developing clarity on: Purpose, Power and Process. These emerged as common themes in discussion and interviews with YO project staff and executive staff of parent organizations. Some of their impressions are captured below:

PURPOSE: *A shared vision and analysis of the role of youth in social justice movements; and an understanding of how the relationship between the two can be mutually beneficial. The most optimal relationship is one in which both partners are able to advance or broaden their common political vision and goals in relation to one another. In this sense, when parent organizations house a YO project, this should not be viewed exclusively in terms of a mentor/mentee arrangement, but rather one that is based on a deeper vision of political growth for all involved.*

When the San Francisco-based Coleman Advocates decided to incorporate a youth component known as Youth Making a Change (Y-MAC), Coleman was initially invested in having the youth carry out the advocacy model upon which it was founded. The idea was for Y-MAC youth leaders to function as effective spokespeople on youth issues. Direct on-the-ground organizing was not part of the vision for the youth program. Before long, however, Y-MAC staff and youth leaders began to pursue an organizing agenda. While this move could have been viewed as a threat to Coleman’s core advocacy mission, the parent organization supported the efforts of the youth to move in a new direction. Their successful organizing efforts eventually influenced Coleman as a whole. According to N’Tanya Lee, executive director of Coleman:

“At first, Y-MAC was the only project at Coleman that did base-building organizing work, but the organization learned how effective organizing can be. Now the whole organization is based more on an organizing model, and the youth organization has become the youth arm of an intergenerational organization. Y-MAC is now a central part of the organizational strategy.

Y-MAC isn't fighting for autonomy from Coleman because their work has become central to the organization as a whole. They surrendered some autonomy to take on overall organizational leadership and to build toward a greater unified vision."

The benefits of the political relationship ideally move in both directions. Not only should the YO project spark new ways of thinking and doing for the parent organization, but the parent organization should serve to broaden the political horizons for youth leaders, and to provide greater access to the larger, multigenerational social justice community.

Claire Tran, co-director of AYPAL in Oakland, had the following to offer on this point: "We see our relationship with [our parent organization] as an opportunity to build the broader movement—to work with community members beyond our youth base, to influence other grassroots organizations, to promote organizing more broadly."

From here, having arrived at a more clear-eyed understanding of the respective roles that the YO program and parent organization each play, both parties are poised for the deeper political conversation on power.

POWER: *A shared understanding of how power operates between and among youth and adult leaders. How do they each conceptualize building power, and how can these different concepts inform one another as opposed to becoming divisive factors?*

When SBU began organizing around the many problems plaguing northwest Bronx high schools, it came to realize that the trusted organizing strategies and tactics of the NWBCCC did not resonate with the youth organizers. In particular, youth felt alienated by the tactic of building relationships with politicians in the Department of Education, as well as focusing all organizing energies on top-down institutional reform. According to Sullivan:

"You can't only organize [the schools] institutionally as a way to empower young people. And a one-on-one relationship-building approach with officials in the Department of Education doesn't work for youth. It's hard for youth to make an ally out of a former target. It took a lot of learning to see how the adult organizing approach didn't fit [the youth organizers]. Youth need more action, they need to put external pressure on targets. Endless conversations with [institutional leaders] just doesn't work for the youth."

Here, Sullivan recognizes the distinct way in which youth leaders understand and relate to institutional power. His point is not to dismiss tactics that call for alliance building with former targets, but rather that such tactics may not be an appropriate fit for youth organizers. This again points to the need for an analysis of the unique roles that the YO project and parent organization can respectively play.

More importantly, it points to the fact that youth organizers relate to institutional power in manner distinct from adult organizers, and this is an extension of their unequal relationship to power within society. Indeed, institutional ageism, the disenfranchisement of those under 18, and the eschewing of basic civil liberties for youth in schools, public health institutions, and even some workplaces, serve to place youth on the political and cultural defensive. Therefore, when youth organizers join spaces with adult organizers, it is understandable that they feel the sharp power imbalances of the external world within the organizational space. The challenge is to recognize, discuss and act upon this power dynamic, to develop structures and processes that work toward alleviating the power imbalance stemming from society.

According to Lee of Coleman Advocates, "The youth and the adults are each responding to their own political culture. Each needs its own space to work things out. From [these respective spaces] they can come together to be fully engaged in the overall organizational process." But when those separate spaces are not supported and institutionalized, when both youth and adult organizers lack the room to develop in their respective political spaces and lead their own decision-making processes, this leads to "communication breaking down and things immediately beginning to fall apart," said Lee.

SBU's Sullivan had a similar take on the need for youth to subsist within their own organizing space. He asserts that, "Youth don't just come to SBU for the political organizing. They also need a space to come and just be with other young people." The desire for this deeper connection, even if it appears to be completely social in nature, informs and motivates the political participation of youth organizers. According to Sullivan, the political goals for youth organizers are wedded to the goal of building deeper community with one another. Conversely, according to Sullivan, "The adult community organizing people come for the political issues." Unlike the youth, "they're not here to meet people."

A separate political space for youth organizing should not be viewed as a separatist move away from the adults. Instead, it's an assertion of the distinct needs and organizing models of youth within the broader social justice movement. While some parent organizations have adapted to create supportive environments for youth autonomy, in other situations organizational independence is preferable to the constant struggle over differences. Here, it is important to recognize that not all power differentials are reconcilable, and at times, YO projects and parent organizations will arrive at the conclusion that separation makes sense. In these cases, all parties involved—youth organizations, parent organizations and allies—are responsible for ensuring principled and amicable relationships during the transition. These organizations benefit greatly if they approach separation as a deliberate political process. The following section offers some useful tools for groups assessing the pros and cons of separation

PROCESS: *A clear delineation (such as written agreements) on how decisions are made between the YO project and the parent organization, including how the YO program will be managed along the lines of administration, finance and supervision of personnel. Finally, process refers to the development of clear evaluation mechanisms to assess the effectiveness of organizational agreements.*

With the distinct purposes of both the YO project and the parent organization clearly defined, and with the differential power relationships between both groups recognized and addressed, the remaining step is to develop clear agreements on issues of decision making, organizational management and evaluation. In most cases involving separations between YO projects and parent organizations, the absence of clear agreements on these matters precipitated the split. Having a clear process operationalizes the elements of "purpose" and "power," moving these discussions from reflection into action.

A clear decision-making process on the strategic plan and organizing campaign direction is indispensable. The example provided by SBU's Sullivan, where youth organizers felt uncomfortable making allies out of previous targets, illustrates the extent to which youth and adult organizers will disagree on key strategies and tactics, despite being equally committed to the broader political mission of the organization. Here, the necessity of a clear decision-making process—wherein disagreements can be aired without losing sight of common goals—is crucial.

Beyond the organizing work, clearly delineated organizational policies are also vital when it comes to managing fiscal and administrative matters between a YO group and its parent organization. This is particularly important in negotiating the complications of a fiscal sponsorship relationship. Nonprofit fiscal sponsors are legally and financially responsible for their projects. Sponsored organizations are, therefore, legally under the control of their sponsoring organizations. All resources of sponsored organizations are the legal property of the sponsoring organizations. It is important to have a sober assessment of the potential lack of autonomy that comes with fiscal sponsorship, and to develop plans to deal with difficult scenarios. Although many organizations navigate these relationships well and never encounter legal issues or struggles over resources, several organizations have faced very serious problems (e.g., resources being siphoned off, struggles over authority on hiring and firing).

In the following section, several practical tools will help groups considering a fiscal sponsor relationship. These tools include a sample Memorandum of Understanding (MOU), which outlines the various financial and legal implications of fiscal sponsorship.

INTERPERSONAL RELATIONSHIPS AND POLITICAL TRUST MATTER, BUT GO ONLY SO FAR

More often than not, YO programs and their parent organizations have addressed some, but certainly not all, of the issues represented by the 3-Ps. This is not to say that the two entities will inevitably reach an impasse without such agreements. Indeed, the Roots Initiative could point to several examples of seemingly healthy relationships between YO programs and parent organizations where not all of the aforementioned points have been articulated. But in these instances, strong personal ties and political trust seem to compensate for the lack of clearly stated organizational analysis, vision and process. In closing, it is important to recognize (at the risk of stating the obvious) the degree to which shared political ideology and similar organizing backgrounds among key individuals in the organization may determine fruitful relationships. Yet, the questions remain: What happens when those relationships begin to shift? Moreover, what happens when new individuals step into those organizational roles?

With or without ideological and experiential synergy among individual organizers, it is important for YO groups and parent organizations to conduct regular evaluations of their relationship, to consistently assess the mutually beneficial aspects of the relationship and to flag potential challenges. The following section begins with a tool to help groups take the first step in that evaluation.

Tools Overview

STEP 1: ASSESS YOUR RELATIONSHIP WITH YOUR PARENT ORGANIZATION

TOOLS:

Cosmo Quiz: What’s The Status Of Your Relationship With Your Parent Organization?

This quiz is a slightly humorous way to reflect on your relationship with your parent organization. It isn’t a systematic assessment of your organizational relationship, but it does offer some broad themes for reflection. Because organizations’ relationships are so varied, the examples used in this tool may not directly relate to your experiences. In that case, the categories identified and the underlying principles may provide a helpful guide for you to assess your relationship more thoroughly.

Evaluating Costs and Benefits Worksheet

This tool is designed to push you to be concrete about what benefits you receive, and what costs you experience from being affiliated with your parent organization. Since these affiliations are often based on personal relationships, it can be hard to objectively sort through all the issues that may come up. It’s easy to get frustrated and lose sight of the serious benefits of affiliating with your parent organization (like access to resources, infrastructure and community credibility); on the other hand, personal relationships may make it hard to examine the real costs to your work (like limitations on your campaign tactics or loss of fundraising opportunities). This tool should help you get more clarity on what you are really getting out of the relationship.

STEP 2: THINK THROUGH THE IMPACTS OF LEAVING YOUR PARENT ORGANIZATION AND GOING INDEPEDENT. MAKE A DECISION ON WHICH DIRECTION YOUR ORGANIZATION WILL TAKE.

Tool: Evaluating the Pros and Cons of Independence Worksheet

Just like it can be difficult to think objectively about your relationship with your parent organization, it can be hard to be objective about going independent. It can feel scary and overwhelming, or it can feel like an easy answer to all of your problems. Neither of these positions captures the whole truth. While it is important to realize the hard work that goes into building an independent organization, it is also important to realize that it is very doable if intentional effort is put into capacity-building. This tool is designed to help you assess the pros and cons of going independent, and to help you get clear on what capacities you would have to develop for a solid transition.

STEP 3: DEVELOP A SOLID PLAN FOR EITHER IMPROVING YOUR RELATIONSHIP WITH YOUR PARENT ORGANIZA-TION, FINDING A NEW FISCAL SPONSOR OR GOING INDEPENDENT.

Tool: Taking It to the Next Level: Moving Forward With Your Parent Organization or Moving Out On Your Own

This tool offers some concrete steps for whatever path you may choose: staying with your parent organization, finding another fiscal sponsor or transitioning to organizational independence. It highlights some key areas to think about when building a stable nonprofit organization.

STEP 4: IF STAYING WITH A PARENT ORGANIZATION OR FINDING NEW SPONSOR, DEVELOP A CLEAR SET OF AGREEMENTS WITH YOUR PARENT OR SPONSOR TO BUILD A STRONGER RELATIONSHIP.

Tool: Sample Memorandum of Understanding

This sample Memorandum of Understanding is designed to aid you in taking a sober look at the legal, financial and authority dynamics that come with fiscal sponsorship. It offers some proactive solutions to deal with problems some groups have experienced, including financial mismanagement, abuses of authority and poor communication. It isn’t a foolproof product, but it should give you some raw material to work with.

IF GOING INDEPENDENT, BUILD YOUR CAPACITY FOR ORGANIZATIONAL INDEPENDENCE.

There is no tool for this step because the work varies between organizations. You should commit at least six months for this intensive organizational development and fundraising work.

Tool 1

COSMO QUIZ:
WHAT’S THE STATE OF YOUR RELATIONSHIP
WITH YOUR PARENT ORGANIZATION?

RELATIONSHIP WITH YOUTH MEMBERS

Some of your youth members walk into the office you share with your parent organization. They’re being pretty loud, and they’re singing the latest hot song (which happens to be pretty explicit). Their noise is disruptive to the staff members of your parent organization, so one of the staff members:

- A. Steps to the members respectfully, explaining the situation and asking if they can hang out in the back conference room.
- B. Comes to you, and asks if you can get the members to lower their voices.
- C. Doesn’t say anything to the youth members themselves, but explodes in frustration at you in the next staff meeting.
- D. Shouts at the youth members and says that, if their mothers didn’t teach them manners, then they’ll have to learn them here.

SUPPORT FOR THE ORGANIZING WORK

Your members are planning the organization’s next campaign, developing a strategy where the youth members need to be able to lobby city officials and build broad community support. You:

- A. Turn to the lead organizer from your parent organization, who has been sitting quietly in the strategy meeting listening to the process. You ask her for advice, and she offers to give you the scoop on the city officials and connect you with some community allies.
- B. Update the other organizers at your parent organization during your next organizational check-in meeting. There isn’t much response or feedback. Although it’s disappointing, you realize that it makes sense because you didn’t support them in their last major fight.
- C. Update the lead organizer at your parent organization during your monthly check-in. She gives you a lot of critical feedback, and she encourages you to rethink your whole strategy. After struggling with her for a while, you realize that she’s upset because the city official who is your primary campaign target is close with the organization’s director. That connection has meant that a lot of city money has been granted to your parent organization.
- D. Tell the director of your parent organization about your successful planning session. He blows up at you for not getting his permission to choose that campaign, and he demands that you scrap it and start over.

PROGRAMMATIC UNITY

Your youth group is a part of a large community development organization. The youth organization started out as a youth advisory committee to give the community development organization feedback on its plans to build a youth center. Your group decided to stay together because the young people wanted to work against gentrification in the community. You are at a strategic planning meeting with your parent organization. What’s the topic of conversation?

- A. How to organize residents—young, old and in-between—to resist gentrification.
- B. How to build a service program that can provide legal advocacy and housing assistance to residents who are threatened with eviction.

- C. How to organize dialogue sessions so that old residents and new residents can build relationships.
- D. How to get a grant from the city to build a mixed-income condominium that will provide income to the organization.

POLITICAL UNITY

Your youth organization works on racial profiling and police brutality. You started out working on safety issues in your school. At first your organization was demanding more police, but your experience showed that having more police just meant that more students of color got caught up in the juvenile justice system. Your parent organization is an adult-based organization working on community issues. In the past, they’ve campaigned for more police to keep the streets safer. You’re at a meeting to discuss the organization-wide police campaigns. What happens?

- A. Both your organization and the adult-based organization share evaluations of your past police campaigns. The adult organization came to the same conclusion as you did: that more police don’t mean greater safety. They want to work with you on racial profiling issues, and they have some interesting ideas about community-based violence prevention efforts.
- B. The adult organization shares its reflections on its past police campaigns. They know that there are problems with the police, but they still want more police because their neighborhood isn’t safe. But, they’re open to dialogue with you and to learn from your experiences. After a long conversation, they agree to work on racial profiling issues with you. You set up another meeting to explore ways to address the violence in the community without relying on policing.
- C. The adult organization wants to continue to call for more police on the streets, but they think that it’s important to organize dialogue sessions between the police and young people. They think the major problem is that neither the police nor the young people are trying to understand each other.
- D. The veteran members of the community organization tell your members they don’t know what they’re talking about. They say that the police aren’t racially profiling anyone; they’re just stopping troublemakers. They say that young people wouldn’t get harassed if they stopped wearing those baggy pants. They finish by saying that your organization needs to stop challenging the police commissioner because it threatens their close working relationship with him.

MONEY

Your organization just got a large grant to support its youth organizing work. You feel:

- A. Excited. Your collaborative work with the development director is really paying off for both your project and your parent organization. You have a clear written agreement about the division of the resources that come from your collaborative fundraising, and the division is fair and logical.
- B. Increasingly confident. You’re really getting a sense of how to manage your own fundraising. You know exactly how much of a fee will be deducted to cover fiscal management costs, and you know when you can access the money. You have a written agreement that outlines your financial relationship, and you know that the parent organization is upholding that agreement.
- C. Happy, but worried. You’re happy because you know you got more money, but you’re confused about how much of it goes to your sponsor and how much you keep for your work. It seems like the way money is handled keeps changing.
- D. Frustrated. You know that you’re going to have to start up a negotiation about how much of the money you’re going to get. The parent organization is in hard financial times, and the last time that happened, they kept all your grant money. That’s especially frustrating because they didn’t support you at all in raising that money.

SCORING

Give yourself 1 point for each A answer, 2 points for each B answer, 3 points for each C answer and 4 points for each D answer.

5 – 8 SOUNDS LIKE IT’LL LAST!

Your parent organization values your youth organizing work, and they know how to treat youth members respectfully. You get concrete support from your parent organization for your organizing work, and are able to access knowledge and connections that you would otherwise be lacking. Your programmatic work and your political analysis are relatively in line with your parent organization. Your organization’s voice is heard and respected by the parent organization. You have a clearly defined monetary relationship. If you raise your own money, you are clear about the fees deducted by the parent organization and about the process for accessing that money. If you raise money collaboratively, you have a clear division of labor and agreement on how money raised will be distributed. Of course, you sometimes have challenges (after all, what relationship doesn’t?), but experience shows that you can work those issues out through dialogue.

9 –16 YOUR RELATIONSHIP NEEDS A SERIOUS HEART-TO-HEART CONVERSATION!

There are some real issues in your relationship; they may be about money or political analysis or respect for youth experiences and perspectives. If you don’t deal with these issues directly and constructively, they could be the beginning of the end of your relationship. But there’s probably still time to address the warning flags and avoid an explosive ending. Get clear on the issues and your proposed solutions, making sure you think about monetary issues, programmatic unity, political unity, authority and the relationship with your youth members. Then, sit down and talk through the issues with your parent organization. Make sure you document whatever agreements you come to. If you don’t already have a clearly written set of agreements (a Memorandum of Understanding), now’s the time to write one up! Set up a time to re-evaluate in a few months.

17 – 20 DO YOU REALLY WANT TO STAY IN THIS RELATIONSHIP?

Your relationship has a lot of issues. If your score is this high, it means that you have many serious programmatic and political differences with your parent organization, and that they probably aren’t engaging in dialogue with you to work through those differences. They may not value your work with youth, and they clearly aren’t interested in understanding issues from a youth perspective. Your monetary relationship is unclear, and there aren’t many prospects for improving it because the organization isn’t open to dialogue. Frustration and resentments are probably mutual at this point. It might be time to think about separating and either starting a new relationship with another sponsor or striking out on your own. Do this deliberately; don’t just pick up and run. Think things through, and make time to have a dialogue with your parent organization so you can leave the relationship in a good place.

WHAT DO YOU GAIN FROM YOUR RELATIONSHIP WITH YOUR PARENT ORGANIZATION?	WHAT DO YOU LOSE BY BEING A PART OF YOUR PARENT ORGANIZATION?
<div><div><div>Fundraising:</div><div><input type="checkbox"/> Fundraising is done by your parent organization</div><div><input type="checkbox"/> Parent organization supports your fundraising</div><div><input type="checkbox"/> Fundraising training and mentorship</div><div><input type="checkbox"/> Relationships with funders</div><div><input type="checkbox"/> Other:</div></div><div><div>Administration:</div><div><input type="checkbox"/> Bookkeeping and audit</div><div><input type="checkbox"/> Payroll and benefits</div><div><input type="checkbox"/> Insurance</div><div><input type="checkbox"/> Clear policies (personnel, organizational, etc.)</div><div><input type="checkbox"/> Other:</div></div><div><div>Physical Infrastructure:</div><div><input type="checkbox"/> Office Space</div><div><input type="checkbox"/> Technology</div><div><input type="checkbox"/> Supplies</div><div><input type="checkbox"/> Other:</div></div></div> <div><div>Fundraising:</div><div><input type="checkbox"/> Advice and mentorship to your organizing staff</div><div><input type="checkbox"/> Support in campaign planning</div><div><input type="checkbox"/> Relationships with community members and public officials</div><div><input type="checkbox"/> Chance to organize intergenerationally</div><div><input type="checkbox"/> Chance to influence the work of parent organization</div><div><input type="checkbox"/> Other:</div></div> <div><div>Political:</div><div><input type="checkbox"/> Advice and mentorship</div><div><input type="checkbox"/> Vision and mission alignment</div><div><input type="checkbox"/> Chance to influence mission and vision of parent organization</div><div><input type="checkbox"/> Broader movement-building</div><div><input type="checkbox"/> Other:</div></div> <div><div>Other:</div></div>	

Tool 3

EVALUATING THE PROS AND CONS OF INDEPENDENCE WORKSHEET

This worksheet will help you assess the costs and benefits of becoming an independent organization. It will push you to think concretely about why you would leave and why you would stay. It will also help you consider your actual capacity to run your own organization.

FUNDRAISING: How would being an independent organization impact your fundraising?

POSITIVES	NEGATIVES

How would it concretely impact your income? Give specific amounts and sources.

How much additional fundraising work would you have to take on?

FINANCIAL MANAGEMENT: How would being an independent organization impact your financial management?

POSITIVES	NEGATIVES

89

What systems would you have to develop?

How much additional financial management work would you have to take on?

PHYSICAL INFRASTRUCTURE: How would being an independent organization impact your physical infrastructure?

<i>POSITIVES</i>	<i>NEGATIVES</i>

What systems would you have to develop?

How much additional physical infrastructure work would you have to take on?

ORGANIZING: How would being an independent organization impact your organizing work?

<i>POSITIVES</i>	<i>NEGATIVES</i>

How much additional organizing work would you have to take on?

POLITICS & CULTURE: How would being an independent organization impact your political and organizational culture?

<i>POSITIVES</i>	<i>NEGATIVES</i>

STRUCTURE: How would being an independent organization impact your organizational structure?

<i>POSITIVES</i>	<i>NEGATIVES</i>

How would your staffing structure have to change?

Would your supervision structure have to change?

MEMBERSHIP: How would being an independent organization impact your youth members?

<i>POSITIVES</i>	<i>NEGATIVES</i>

What systems would you have to develop?

ORGANIZATIONAL CAPACITY: List the capacities that your organization would have to develop to become independent:

1.
2.
3.
4.
5.

Does your organization currently have the time and resources to invest in developing these capacities in the near future? Will it have a positive or a negative impact on your organizing work?

COMING TO A DECISION

Consider your reflections on your relationship with your parent organization, the possible benefits and costs of becoming independent, and your organizational capacity.

Does it make the most sense for your organization to:

- ☐ Become independent.
- ☐ Renegotiate your relationship with your current parent organization.
- ☐ Maintain your current relationship with your current parent organization.
- ☐ Identify a new fiscal sponsor that could offer a more appropriate relationship.
- ☐ Stop being a nonprofit organization altogether.
- ☐ Other:

Next, the “Taking It to the Next Level” worksheet can serve as a reference in guiding you through these processes.

Tool 4

TAKING IT TO THE NEXT LEVEL:
MOVING FORWARD WITH YOUR PARENT
ORGANIZATION OR MOVING OUT ON YOUR OWN

FIRST: Have a conversation with your members and leaders to determine if you want to stay with your current parent organization, if you want to become a fully independent organization or if you want to be fiscally sponsored by another organization. You can use Tool 3 in this chapter to structure these discussions.

If you want to stay with your parent organization:

1. **Facilitate conversation with your members and leaders** to discuss any challenges you have in your relationship with your parent organization and to develop constructive solutions. You should also discuss whether you would like to develop new organizational development capacities that are currently being managed by your parent organization (e.g., if you want to take over fundraising).
2. **Sit down with your parent organization.** Clearly and directly raise the challenges that your organization identified and present your solutions. Share the ways you would like to see the relationship change, including the new organizational development capacities you would like to take over from your parent organization. Come to a shared agreement about how to move forward.
3. **Develop a thorough Memorandum of Understanding** that reflects your agreements with your parent organization. Set a time to re-evaluate the relationship in three to six months.
4. **Create a workplan to deepen your capacity** to carry out your new organizational development tasks.

If you decide to be fiscally sponsored by another organization:

1. **Facilitate a conversation with your members and leaders** to set your organizational development goals so you can be clear about what organizational capacities you want to develop internally (e.g., fundraising), and which capacities you would like to have your new fiscal sponsor manage (e.g., bookkeeping).
2. **Inform your current parent organization.** Knowing that this can be a complicated and contentious process, work hard to preserve the relationship. Your parent organization may be an important ally for your future work. Develop a workplan and timeline for transferring information and resources.

• If your relationship has been a straightforward fiscal sponsorship, you will mainly be transferring administrative tasks and resources.

• If you have been incubated by a parent organization, you are also likely to be transferring more intensive organizational development work like fundraising, strategic planning and personnel management. Review every aspect of the relationship, identifying a timeline, workplan and training plan for each aspect.
3. **Identify a new fiscal sponsor** that can play the roles your organization has identified, and begin a dialogue with them.
4. **Develop a thorough Memorandum of Understanding** with the new fiscal sponsor. Make sure this captures the division of tasks and capacities that your organization identified.
5. **If possible, start to build internal capacity** to carry out the new arenas of organizational development work before you transition to the new sponsor.

If you decide to become an independent organization:

- 1. Inform your current parent organization. Develop a workplan and timeline for transferring information and resources.** Knowing that this can be a complicated and contentious process, work hard to preserve the relationship. Your parent organization may be an important ally for your future work. You will need between four months and a year to get your own 501(c)(3) status, so you will either need to stay with your current parent organization for that period or find another sponsor in the interim.
 - If your relationship has been a straightforward fiscal sponsorship, you will mainly be transferring administrative tasks and resources.
 - If you have been incubated by a parent organization, you are also likely to be transferring more intensive organizational development work like fundraising, strategic planning and personnel management. Review every aspect of the relationship, identifying a timeline, workplan and training plan for each aspect.
- 2. File for incorporation as soon as possible, and file with the Internal Revenue Service for 501(c)(3) status.** This process takes between four months and a year, so you should start the process early. Filing for 501(c)(3) status is a very technical process, but it is not very difficult. You should use some outside resources to make sure you have all of your bases covered, legally and financially. The remainder of this worksheet will outline some of the broad areas of work. For a more thorough listing of legal and financial tasks, you can find some helpful resources on the “Resources” page at the end of this toolkit.
- 3. Facilitate a conversation with your members and leaders to set your organizational development goals** so you can be clear about what organizational capacities you will need to develop internally. Make sure to leave adequate time for this organizational development work. Organizational development areas that you should consider include:
 - **Nonprofit Governance and Management:** Develop a Board of Directors;* Train youth leaders as board members; Develop By-Laws.*
 - **Liability & Insurance:** Get Liability Insurance;* Board and Directors’ Insurance; Unemployment Insurance; Disability Insurance; Worker’s Compensation Insurance; and Auto Insurance.
 - **Financial Management:** Hire a bookkeeper; Develop financial management policies;* Plan for your first-year audit; Develop clear budget development and cash-flow tracking systems; Develop a realistic budget for your first-year of independence.
 - **Fundraising:** Develop foundation fundraising capacity; Develop grassroots fundraising capacity; Create a fundraising database; Develop a first-year fundraising plan; If possible, generate a reserve fund to help you through your transition to independence; Notify funders about your transition to being an independent organization.
 - **Personnel Management:** Develop personnel policies;* Contract a payroll processing service; Develop a benefits package for staff, especially health insurance; Develop a supervision structure.
 - **Physical Infrastructure:** Find your own office space; Set-up phone systems and Internet connectivity; Develop technological infrastructure; Develop an office management plan; Develop basic communications materials.

The tasks marked with asterisks () should definitely be completed before you become an independent organization, though ideally all tasks would be completed before transition.*

- 4. Use the time period between starting your transition and independence to develop infrastructure.** Don’t plan for intense programmatic growth or major personnel transitions in this period; stabilizing your organization takes time. This is particularly important if your relationship with your parent organization is tense or antagonistic; take time to ensure your organization gets through a difficult period in a healthy way.
- 5. Have a final check-in with your parent organization before you leave** to give each other feedback and to identify what kind of relationship you want in the future.

Tool 5

SAMPLE MEMORANDUM OF UNDERSTANDING (MOU)

Note: This tool outlines some of the complications that come with nonprofit fiscal sponsorship, specifically the fact that sponsored organizations are technically under the full financial and managerial control of their sponsoring organizations. This reality needs to be addressed up front and clearly in your Memorandum of Understanding, including mechanisms to ensure your autonomy and to facilitate direct communication over differences.

This template is not a legal document. You should have a lawyer look it over before using an MOU based on this template to make sure that you are fully protected.

For the purposes of readability, this MOU uses the sample name “Community Power Organization” to represent the parent organization, and “Youth Power Organization” to represent the sponsored youth organization. The names of relevant organizations should be substituted. This sample MOU outlines a relationship that is primarily about fiscal sponsorship but which also incorporates a low level of technical assistance.

OVERVIEW

This agreement outlines the relationship between *Community Power Organization* (the *fiscal sponsor organization*) and *Youth Power Organization* (*sponsored organization*). Its purpose is to provide an overview of the fiscal sponsorship policies of the *Community Power Organization*, as well as the rights and responsibilities of the *Youth Power Organization*.

The *Community Power Organization* is a nonprofit public benefit corporation under the laws of New York State. It is tax exempt under Section 501(c)(3) of the Internal Revenue Code.

The mission of the *Community Power Organization* is to build the power of low-income people of color in Justiceville to fight for equality and respect. Because the mission of the *Youth Power Organization* is to fight for justice for low-income youth of color in Justiceville. The *Community Power Organization* has an interest in supporting the development of the *Youth Power Organization*.

Therefore, the *Community Power Organization* agrees to act as the fiscal sponsor of the *Youth Power Organization* by establishing a restricted fund to receive and disburse donations earmarked for support of the *Youth Power Organization*.

FINANCIAL RELATIONSHIP

The *Community Power Organization* will manage all monies collected for the *Youth Power Organization* via the *Community Power Organization’s* 501(c)(3) nonprofit status. The *Community Power Organization* shall place all gifts, grants, contributions, and other revenues received by the *Community Power Organization* and identified with the *Youth Power Organization* into a restricted fund to be used for the sole benefit of the *Youth Power Organization’s* mission. The parties agree that all money, and the fair market value of all property, in the restricted fund be reported as the income of the *Community Power Organization*, for both tax purposes and for purposes of the *Community Power Organization* financial statements. Under no circumstances will funds earmarked for the *Youth Power Organization* be used for any other purposes than the work of the *Youth Power Organization* as determined by its membership, staff and Advisory Board.

The *Community Power Organization* will retain an administrative fee of 10% of all monies received for the *Youth Power*

Organization. In return, the *Community Power Organization* will provide the following services:

- ❑ Receive foundation grants on behalf of the *Youth Power Organization*. All funds received will be disbursed to the *Youth Power Organization* within ten days of receipt.
- ❑ Maintain *Youth Power Organization’s* financial records, including monthly financial statements and cash flow reports.
- ❑ Handle all federal and state tax filings.
- ❑ Include the *Youth Power Organization* in its insurance policies.
- ❑ Include the *Youth Power Organization* in its annual audit.
- ❑ Include the employees of the *Youth Power Organization* in its bi-weekly payroll processing and in its medical insurance policies.
- ❑ Provide training and technical assistance to the staff of the *Youth Power Organization* in fundraising and financial management.

The *Youth Power Organization* is fully responsible for raising sufficient funds to cover operating expenses, as well as for tracking its own revenues and expenditures. At the beginning of each fiscal year, the *Youth Power Organization* must submit a projected budget (including funds raised and committed) for feedback from the *Community Power Organization* before making any significant expenditures or commitments. As long as the *Youth Power Organization* maintains fiscal solvency, all financial decisions will remain in the hands of the Director and Advisory Board of the *Youth Power Organization*. If there are financial concerns on the part of either party, they must be handled as described in the “Disputes and Differences” section below.

Potential Changes in Fundraising Relationship: As of this agreement, the *Youth Power Organization* is fully responsible for its own fundraising. If the *Youth Power Organization* and the *Community Power Organization* raise any funds collaboratively, a separate written agreement must be developed to clarify the division of resources and the expected work roles. This agreement must be developed and agreed upon before the submission of the grant proposal. A similar written agreement must be developed for any funds raised by the *Community Power Organization* on behalf of the *Youth Power Organization*. This agreement must be developed and agreed upon before the submission of the grant proposal. Unless otherwise negotiated, a 10% fee (over and above the 10% administrative fee) will be the standard deduction taken from these grants by the *Community Power Organization* to cover the expenses incurred in the fundraising process.

All revenue and expenses must be reported in a timely and accurate manner to the *Community Power Organization*. The *Youth Power Organization* is authorized to open and manage its own bank account under the auspices of the *Community Power Organization*, but all revenues must be reported (with photocopies) before they are deposited, and all expenses must be reported on a bi-weekly basis to the *Community Power Organization*.

The *Community Power Organization* authorizes the *Youth Power Organization* to make purchases necessary to carry out the organization’s mission as long as adequate funds have been raised. The *Youth Power Organization* agrees not to spend more than it has fundraised for a given period and also agrees not to assume any debt.

The *Youth Power Organization* agrees to track its own income and expenses, in addition to the *Community Power Organization’s* work to develop monthly financial statements. These two tracking systems will be reconciled on a quarterly basis to ensure that both parties are clear on the financial activities of the organization.

The *Youth Power Organization* agrees not to use funds in any way that would jeopardize the tax-exempt status of the *Community Power Organization*.

LEGAL RELATIONSHIP

As the sponsoring organization, the *Community Power Organization* exercises full legal control over projects.

As a project of the *Community Power Organization*, the *Youth Power Organization* is not a discrete entity; rather it is part of the *Community Power Organization’s* organizational structure. The *Community Power Organization* Board of Directors has full governing authority over and full legal and fiduciary responsibility for all projects; this means that the *Community Power Organization* technically has full governing authority over the *Youth Power Organization*. However, in order to respect the *Youth Power Organization’s* programmatic autonomy, the *Community Power Organization’s* Board of Directors delegates responsibility for day-to-day operations of the *Youth Power Organization* to the *Youth Power Organization* Director.

The *Youth Power Organization* agrees to abide by all state and federal regulations and by the personnel policies of the *Community Power Organization*. The *Youth Power Organization* will not use any portion of its assets to participate or intervene in any political campaign on behalf of or in opposition to any candidate for public office. The *Community Power Organization* assumes full legal responsibility for all activities of its projects and, as part of this role, must review and approve all contracts, loans, publications, copyrights, and other legal documents of the *Youth Power Organization*.

Because the IRS imposes this stipulation upon all public charities, the *Community Power Organization* temporarily assumes all legal responsibility for any tangible or intellectual products (such as videos, films, books, works of art, research manuscripts, and patents or copyrights covering the aforementioned) while that project is affiliated with the *Community Power Organization*. This responsibility transfers to the project if and when the project “spins off” as an independent nonprofit entity or transfers to another fiscal sponsor. The *Community Power Organization* will not exercise any political or creative control over the contents of the materials; however, the *Community Power Organization* does reserve the right to require edits that ensure that all organizational materials conform to 501(c)(3) regulations.

The *Youth Power Organization* must identify itself as a project of the *Community Power Organization* in all of its public materials, in particular in its fundraising appeals. This is designed to protect both the 501(c)(3) status of the *Community Power Organization* and the reporting needs of the donors of the *Youth Power Organization*.

The *Community Power Organization* authorizes the *Youth Power Organization* to have its own Advisory Board in order to provide accountability and support for projects. While this Advisory Board does not technically have legal authority over the work of the *Youth Power Organization*, the *Community Power Organization* will respect its organizational authority to the fullest extent possible. The *Youth Power Organization’s* Advisory Board is responsible for providing assistance in areas such as fundraising and organizational development. They should provide day-to-day oversight of the *Youth Power Organization*, including supervision of the *Youth Power Organization* Director.

PERSONNEL

The *Community Power Organization* is legally the employer of all *Youth Power Organization* staff members, with final decision-making authority for hiring and termination of project employees. The *Community Power Organizations* agrees to delegate day-to-day authority to the staff and Advisory Board of the *Youth Power Organization*, but retains the right to override these decisions if the staff members violate the personnel policies of the *Community Power Organization* or endanger the wellbeing of the *Community Power Organization*. The *Community Power Organization* agrees to give the *Youth Power Organization* a month’s notice before invoking this right, giving the organization a chance to rectify the issue. If *Community Power Organization* invokes this right, it will immediately initiate direct communication with the *Youth Power Organization’s* Director and Advisory Board in order to reach a mutually agreed upon plan for moving forward. If the two groups are unable to reach agreement on their own, the community mediation process (as described in the “Disputes and Differences” section below) may be invoked by either party. However, due to legal considerations, final decision-making power on staffing decisions rests with the *Community Power Organization*.

In order to participate in the *Community Power Organization's* payroll processes, the *Youth Power Organization* agrees to submit timesheets and payment two days before the payroll reporting is due. Funds will not be disbursed until payment is received.

COMMUNICATION

The Director of the *Community Power Organization* will serve as the contact person who will monitor project activities. The Director will convey necessary information and resources to the Director of the *Youth Power Organization*, and will respond to questions raised regarding *Community Power Organization* systems and processes.

Communication between the *Community Power Organization* Board of Directors and the *Youth Power Organization* will take place between the *Community Power Organization* Director and the *Youth Power Organization* Director.

If any issues develop about the *Youth Power Organization's* relationship with the *Community Power Organization*, the organizations' Directors are expected to raise these issues immediately and directly with each other. These issues should be handled as described in the "Disputes and Differences" section below.

All communication to the *Youth Power Organization* Advisory Board will be facilitated through the *Youth Power Organization* Director. The *Community Power Organization* may only circumvent these channels in moments of extreme urgency (e.g., fiscal crisis, serious personnel violations) to contact the *Youth Power Organization* Advisory Board directly. In these cases, prior notice must be given to the *Youth Power Organization* Director. If this circumvention of communication channels is the result of conflict between the *Youth Power Organization* Director and the *Community Power Organization*, the situation must be handled as described in the "Disputes and Differences" section below.

When major problems (either internal to the *Youth Power Organization* or external) arise in the work of the *Youth Power Organization*, the *Youth Power Organization* is expected to keep the *Community Power Organization* informed of the issues. The *Community Power Organization* will get involved if the situation demands and will always maintain direct communication with the *Youth Power Organization* Director and, if necessary, Advisory Board.

DISPUTES AND DIFFERENCES

All minor concerns must be directly communicated between the Directors of the two organizations, and all parties are expected to resolve these issues in a friendly and constructive manner.

If the Director of the *Community Power Organization* believes that the *Youth Power Organization* is not abiding by state or federal regulations or by the personnel policies of the *Community Power Organization*, or if there are serious financial concerns, the *Community Power Organization* Director will immediately communicate these concerns to the *Youth Power Organization* Director. If these concerns are not addressed in a direct and timely manner (within one week), the *Community Power Organization* Director is then empowered to approach the Advisory Board of the *Youth Power Organization* in order to develop a plan for the resolution of these issues (after informing the *Youth Power Organization's* Director of their intent to do so). The *Youth Power Organization's* Director has the right to have access to all such communication. All parties are expected to remain in constant and direct communication in times of conflict; cutting parties out of communication will be considered a breach of this agreement.

All parties are expected to attempt to raise conflicts in a friendly and constructive manner. If these attempts at friendly internal resolution are unsuccessful, all parties agree to submit to a community mediation, led by a mediator with whom all parties can agree to work. If the mediation is successful, all parties must sign a written agreement detailing the result of the mediation. If the mediation is unsuccessful, all parties will agree to enter a mediated process of terminating the relationship (as outlined below). All parties agree to avoid legal action or invocation of legal authority unless absolutely all other options have been unsuccessful.

TERMINATION OF RELATIONSHIP

If the *Youth Power Organization* would like to spin-off into an independent entity or transfer to a new fiscal sponsor, the project must notify the *Community Power Organization* as soon as possible, giving no less than two-months notice. The Advisory Board of the *Youth Power Organization* must approve this decision. All funds raised and all assets accumulated by the *Youth Power Organization* while sponsored by the *Community Power Organization* travel with the program. There will be no additional costs levied above the previously agreed upon administrative fees. Assets may include monetary, physical and intellectual property. Once proof of independent status or new fiscal sponsorship is received by the *Community Power Organization*, all funds will be immediately transferred.

If the *Community Power Organization* would like to end the relationship with the *Youth Power Organization*, they must notify the *Youth Power Organization* as soon as possible, giving no less than three-months notice.

If serious conflicts emerge between the two organizations that cannot be resolved through the mediation process described above and this conflict has implications for the process of termination, the two organizations will enter a termination mediation process to be facilitated by a mutually agreed upon community mediator. All parties agree to submit to the terms of the community mediation process. This process will give the *Youth Power Organization* at least two months to find a new fiscal sponsor, but must not last more than three months.

If the *Youth Power Organization* is financially and programmatically inactive for a period of one year, the Board of Directors of the *Community Power Organization* will disburse the funds so as to further the original mission of the *Youth Power Organization*.

EFFECTIVE DATE

This agreement will become effective on _____(date), _____ (year). It will be considered in effect for one year, at which point it must be renewed by all parties.

SIGNED BY:

Director,
Community Power Organization

Printed Name: _____

Signature: _____

Date: _____

Director,
Youth Power Organization

Printed Name: _____

Signature: _____

Date: _____



Chapter 3

BRIDGING YOUTH ORGANIZING & YOUTH DEVELOPMENT

REFLECTIONS ON BRIDGING THE YOUTH ORGANIZING-YOUTH DEVELOPMENT DIVIDE

As origin stories go, the emergence of youth organizing (YO) over the past 15 to 20 years has been set against the backdrop of a booming, multibillion-dollar nonprofit sector known as youth development (YD). It could be said that YO has largely been defined in distinction to YD, in much the same way that organizing is cast against “direct services.”

But beyond these apparent differences, the truth remains that YO and YD both exist to meet the core developmental needs and outcomes of young people in society who, depending on one’s political viewpoints, are deemed either “at-risk” social problems or an oppressed group seeking justice. Among the 10 groups that participated in the Roots Initiative, all understood the value of YO as a method for advancing youth development by having youth engage in social justice organizing. So too, all 10 groups generally agreed that the organizing work benefits when complemented by meaningful, social justice-oriented youth development programming (such as, educational support, counseling and skills building). But, because YO is largely associated with community activism (young people taking-on external systems of inequality), its effectiveness as a youth development model is often overlooked or undervalued. Among YD traditionalists, YO is often considered an untested form of YD. Among some YO practitioners, YD is often deemed apolitical or, worse, politically conservative and antithetical to the social justice values inherent to organizing. This divide is only exacerbated by the realities of the philanthropic world. From a cursory analysis conducted by the FCYO during 2003–2004, it was approximated that the total amount of YO funding nationally was less than 1% of the total amount of philanthropic and public funds directed at YD programs.

Despite what seem to be sharp differences between the two approaches, many YO practitioners, including those who participated in the Roots Initiative, have prioritized work aimed at supporting the individual and collective development of youth leaders. As one staff organizer observed, “It’s a huge contradiction for these young leaders to fight against inequality on behalf of others while they themselves continue to suffer the impact of those inequalities day-to-day.” Maria Brenes from Inner City Struggle (ICS) spoke about these dynamics in relationship to ICS’s work on educational justice in Los Angeles: “In communities like Los Angeles, where services for youth (including public education) are so under-resourced, it is imperative that youth organizing groups (particularly those organizing around education) ensure their leaders are prepared for college so that they can access higher skilled jobs and higher education. Education is the vehicle to help young people access a quality life and to improve the conditions in under-resourced communities.”

This chapter offers some reflections on how to resolve such contradictions by discussing the benefits (and challenges) of bridging YO and YD. It is followed by a set of tools to aid groups attempting to incorporate a meaningful and politically-oriented YD program within a YO organization.

ON THE DIFFERENCES BETWEEN YO AND YD: A BRIEF SUMMARY

In the wake of the “urban crisis” of the late 1960s through the late 1980s—when the inner cities were beset by unemployment, housing abandonment and decay, public fiscal austerity, crime and the drug epidemic—YD emerged as one direct response to the myriad problems impacting youth from hard-hit communities. In general terms, YD is an approach to working with youth that seeks to meet the developmental needs of young people through a range of methods that include: diversion, intervention,

FIGURE 1.

Youth organizing is a youth development and social justice strategy that trains young people in community organizing and advocacy, and assists them in employing these skills to alter power relations and create meaningful institutional change in their communities. Youth organizing relies on the power and leadership of youth acting on issues affecting young people and their communities. Young people themselves define the issues, and youth organizing groups support them as they design, implement and evaluate these efforts. Employing activities such as community research, issue development, reflection, political analysis and direct action, youth organizing increases civic participation and builds the individual and collective leadership capacity of young people. (“An Emerging Model for Working with Youth,” *FCYO Occasional Papers No. 1, Volume 4*, 2003)

Youth development refers to the process all young people undergo as they build the individual assets or competencies (including academic, cognitive, civic, emotional, physical, social, cultural and vocational) needed to participate in adolescence and adult life. All young people—affluent or low-income, above grade or out-of-school—need a mix of services, supports, and opportunities in order to stay engaged. Youth development requires that young people have stable places, services, and instruction, as well as supports: relationships and networks that provide nurturing, standards, guidance, and opportunities for trying new roles, mastering challenges, and contributing to family and community. (“An Emerging Model for Working with Youth,” *FCYO Occasional Papers No. 1, Volume 4*, 2003)

direct service, education and training, skills-building and civic engagement. (See Figure 1 and the diagram in the tools section for further elaboration).

Organizations with different ideological views of youth, particularly of youth who are considered “at-risk” or structurally disadvantaged, will choose different youth development methods that reflect their beliefs: Those with conservative views of young people generally rely on diversion and intervention approaches (recreation, disciplinary programs); those with liberal views tend to adopt services and education approaches (youth are considered an underserved, under-supported population); finally, those working with a social justice framework are more likely to choose civic engagement as a YD strategy, an approach that simultaneously meets the developmental needs and addresses issues of structural power and inequality.

Since the recent inception of YO as a distinct social justice method and/or “field,” its practitioners have consistently promoted its ability to meet the outcomes of traditional YD through youth engagement in the non-traditional practices of community organizing and advocacy, direct action planning and implementation, media messaging about youth and community issues, and political education. Several years ago, during the first gathering organized by the FCYO, YO funders and practitioners came together to build a common working definition of YO. From the outset, the definition was developed in distinction to YD. As one organizational participant asserted, “Youth organizing is youth development with a social justice twist.... it’s youth development with social justice at its core.” (*What is Youth Organizing?*, FCYO, 1999)

Subsequent publications on YO would make similar claims. In the report *From the Frontlines: Youth Organizers Speak* (Listen Inc, 2003), the authors quote a young leader who had the following to say about YO as a unique form of YD: “[Youth organizing] really changes the [youth development] concept from an individual to a collective, and I think that’s really important to the person’s development.”

The most comprehensive publication on the issue to date is *Bringing It Together: Uniting Youth Organizing, Development and Services for Long-Term Sustainability* (Movement Strategy Center, 2005). This report also makes firm arguments for why the YO practices described above are vital approaches to developing the skills and capacity of young leaders. Drawing from research

conducted with YO groups across the country, it reiterates the point that true and lasting transformation occurs when youth are treated as agents of social change as opposed to “clients” who receive services. Bringing It Together also adds something new to the discussion. It recognizes the degree to which a YO project can benefit from (and is often in serious need of) YD programming that may not directly relate to or serve the organizing work. In other words, there are times when the skills and capacity-building activities connected to organizing may not suffice when it comes to meeting the holistic development needs of youth leaders. This point is often understated by YO practitioners and supporters. Nevertheless, the report reveals “how many youth organizing groups are now also incorporating innovative approaches to support the development of their members—hand-in-hand with their organizing campaigns.” Many groups “have even been pioneering their own developmental components, as well as partnering with more traditional service organizations.” These components include counseling, healing work and academic support. The challenge for these groups lies in creating these effective YD components—many of which are not explicitly political in character or content—so that the components resonate within the broader political mission and values of the organization. How can they be complementary? How can they strengthen the YO mission?

WHY BRIDGE THE TWO? ON THE BENEFITS OF INCORPORATING YD WITHIN A YO ORGANIZATIONAL CONTEXT

Leadership Development

For many YO projects, the leadership development programs begin and end with political education (PE). During PE sessions, some of which take the form of season-long “freedom schools,” new YO recruits are introduced to the foundational politics of the organization. They are often provided the “101” curriculum that includes the history of political movements to contextualize organizing, political terms, the difference between direct service and organizing, the meaning and importance of goals, strategies and tactics. Although such PE can prove an invaluable orientation for those new to organizing, it can also presume a level of educational skill among youth who have never engaged in political study before, or whose skills have been underdeveloped in their formal school education. This is true even for organizations that pay attention to issues of pedagogy, implementing basic popular education methods. Indeed, challenges with literacy and comprehension of texts, writing difficulties and the differences among youth learners when it comes to processing information can all be challenges for a YO project with a strong PE component. This can limit the effectiveness of this core leadership development plan. For some organizations the solution is to create YD programs that can address skill and education gaps. These programs include academic tutoring, writing workshops and reading groups. They are viewed as stepping-stones in a long-term leadership development program for the organization. In this sense, they also serve as a recruitment program for the YO group, providing a concrete service that members receive in exchange for their service to the organization. Such academic support can also be extended to experienced organizers who are tracked for college. In the Roots Initiative, for example, some groups provided organizers after school tutoring and college prep support (particularly with college applications). These supports were offered in lieu of other incentives, particularly stipends. *See the case study from Inner City Struggle’s academic support model.*

A Holistic Approach to Organizing

For some YO groups,choosing to incorporate a YD program reflects an understanding of how organizational health and sustainability are directly linked to members’ health and sustainability. There is an obvious contradiction to organizing youth to fight externally for the rights of others while they continue to suffer internally from multiple inequalities. These inequalities are not only material, but also physical, emotional and spiritual. YO groups that seek to support youth on these heretofore internal or “private” matters maintain a holistic framework to social justice organizing. In order for social justice movements to be successful, these groups recognize that members should bring their “whole selves” to the work; there should be a healthy balance between seeking external political redress and internal wellness. As such, some groups have developed in-house counseling and support sessions (in individual and group settings), others have integrated programs aimed at doing healing work with youth members who have experienced trauma, and others still have integrated health and wellness sessions into their core PE curriculum.

CASE STUDY
INNER CITY STRUGGLE:
ACADEMIC SERVICES PROGRAM FOR UNITED STUDENTS

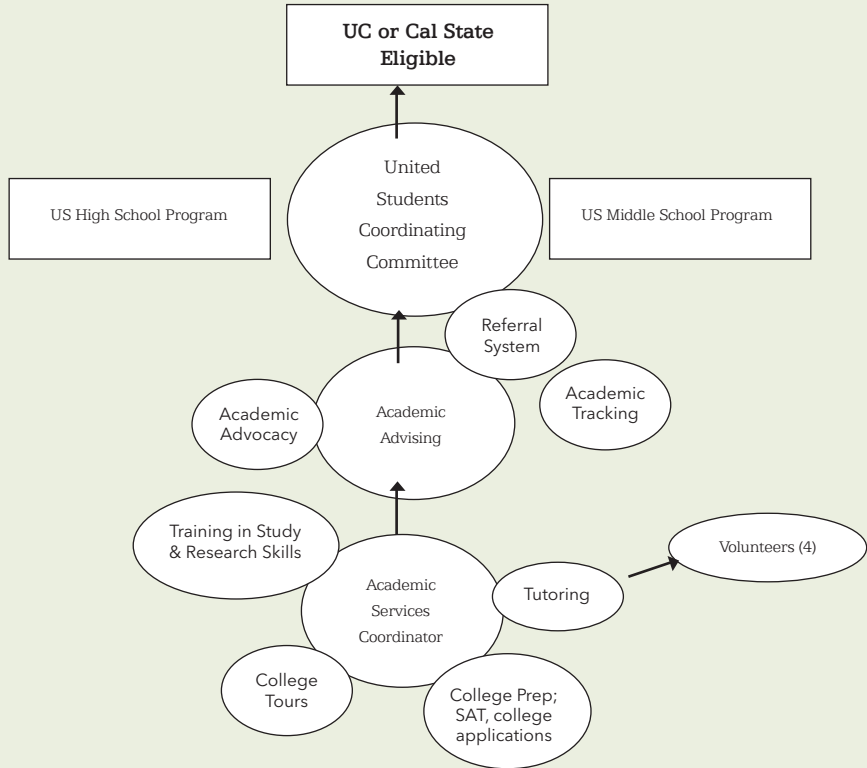
PROGRAM PURPOSE

The creation of the Academic Services Program emerged with the realization that the youth involved in organizing for educational change needed a vehicle of support for their individual academic achievement. The goal of the Academic Services component is to support the core youth members to enter institutions of higher education as they organize for educational justice. It is important for Inner City Struggle (ICS) that young people engaged in the social change work be provided the necessary tools to role model high educational standards. ICS’s educational standards link academic achievement to social responsibility.

Students receive monthly workshops on academic planning for college and their career. College trips are planned to demystify the college experience by having college students that attended inner-city schools explain the process for ensuring college eligibility. In addition, both high school and middle school members receive academic support through individual empowerment plans, tutoring and career guidance. Individual empowerment planning includes student academic files that track the progress of each student. Members that are not receiving a passing grade of a C are required to attend tutoring. Both the academic and organizing staff regularly check-in with students to provide any additional support needed to achieve individual empowerment plan goals, along with developing strategies to accomplish these goals.

PROGRAM GOALS

- 1. Provide systematic support for developing and completing graduation and college eligibility requirements
- 2. Provide tutoring
- 3. Provide SAT preparation
- 4. Assist in college application process
- 5. College tours to local colleges and universities, including an annual weekend-long college tour to the Bay Area
- 6. Assist students in identifying financial aid resources
- 7. Assist undocumented students to identify viable opportunities to attend institutions of higher education
- 8. Provide computer lab accessibility
- 9. Training for conducting research, study skills
- 10. InnerCity Struggle library access with educational materials reflecting Ethnic Studies and Popular Education



A Heterogeneous Approach to Organizing: Multiple Oppressions, Multiple Liberations

Many YO groups adopt the view that there is no singular or “bottom-line” oppression. To the contrary, injustice and inequality register differently for different people. For some, it is felt along the lines of gender and sexuality, for others it’s race, nationality and immigration status, and for others it’s disability discrimination. If there is no singular way in which oppression takes shape in the lives of youth members, then it would follow that there is no singular resolution. Yet, many organizing groups view community resolution or “victory” through a singular lens—that of the organizing campaign win. However, the development of a YD component within a YO program can complicate and differentiate what it means to find liberation through the political work. YD components that support members by encouraging them to assert their multiple political identities can be liberating in their own right. Similarly, YD components that encourage members to practice new ways of relating to each other, ways that challenge the dominant relations of society (hierarchy, hetero-normative relations, competitiveness, materialism, etc.) can also be considered community “victories” as they create an alternative to dominant institutions. The YD activities provide a vital, albeit small, space for youth to begin “living the vision” of the world they want to bring into existence.

WHAT ARE THE CHALLENGES TO BRIDGING YD AND YO?

Resources and Legitimacy

The single greatest challenge Roots Initiative groups experienced in their attempts to develop YD programs within a YO context was the issue of finding resources to support the YD component. According to Maria Brenes, “The biggest challenges to having Academic Services in-house is finding the funds to support both our youth organizing work and our Academic Services work.” Within the YD field, outcomes are what matter. Specifically, institutions that fund YD want to be ensured that grantees are working with high numbers of youth and that those youth are scoring well on a range of YD outcome variables. But this “high yield” strategy rarely conforms to the philosophy and mission of YO groups that seek to develop leadership among a core grouping of young people who will in turn provide leadership for their communities. In other words, YO groups that are invested in a YD component insist that the YD approach should treat youth members as social change agents, not as clients. These kinds of social change or “civic engagement” strategies for YD have yet to find legitimacy among those most influential in the field. This lack of legitimacy is reflected in the dearth of funding opportunities made available to YO groups with YD components. It comes as little surprise, then, that the vast majority of YD projects housed within YO groups receive no direct funding; most of them are resourced by volunteers or by stretching thin operational funds.

Can’t Do Everything

Another major challenge for YO groups is how to responsibly take on a YD component given limited time and resources. The immediate impulse for many YO staff members is to directly support youth members who are experiencing a crisis or who have experienced trauma. They soon find themselves overwhelmed by the task, realizing the crucial error of offering support without the capacity to deliver. For many groups, the solution lies in developing a strong network with a range of politically like-minded support services (counselors, crisis intervention workers, doctors, teachers, housing advocates, etc.). These trained professionals in various support fields can even be members of the organization. When crisis occurs in the lives of youth members, YO groups, rather than take on the responsibility of providing direct support, can refer youth to trusted support services with the capacity to address the complex issues facing young people. The challenge is in building these relationships so that they resonate with the political values of the YO group. The tools at the end of this chapter provide some suggested methods on how to best do this.

CONCRETE STEPS TOWARD DEVELOPING AN INTEGRATED YOUTH ORGANIZING-YOUTH DEVELOPMENT PROGRAM

Learn: Groups that are interested in integrating youth development activities into their youth organizing work should begin with in-depth learning about the framework of youth development, and about organizations that have successfully integrated YO and YD work. The *Bringing It Together* report developed by the Movement Strategy Center is an important resource. See the “Resources” page at the end of this toolkit for a link to the downloadable version of this report.

Reflect: It is also important for organizations to reflect on the particular youth development and service needs of their constituencies. There is not one universal model of youth development that works for all young people; the models vary depending on many factors, including class background, race, gender, sexuality, educational access, access to stable housing, and so on. While the members of some organizations primarily need academic tutoring to overcome the inadequate education they received in the public education system, other organizations have to start with emergency housing referrals or crisis counseling to help members achieve stable living conditions before they can consider focusing on academic support. Just as youth organizations choose campaigns relevant to the particular experiences of their constituencies, they need relevant youth development programs. It is also important to reflect on the progression of youth development activities in the same way you would think about the progression from a youth member to a youth leader.

Build Capacity: It is important for organizations to reflect on their internal capacity to run youth development programs or to develop referral programs. The financial challenges loom large, and it is important for organizations to be clear about the scale of resources they would need to run an effective youth development program and to be concrete about where those resources can come from. Staffing capacity challenges are also significant. It can be difficult for organizations to find staff members who have youth development skills along with an investment in the political vision of the organization and in the methodology of organizing.

Bridge the Divide: It is important for organizations to plan out how the youth development and the youth organizing complement one another. This is a two-way street. Youth development work can provide an effective entry point for new young people to engage with explicitly political work, and it can help to sustain young people in the work over the long-term. There is a wide range of youth development outcomes that can be accomplished through the organizing process itself, especially if there are intentional efforts to build out the developmental aspects of the work. Two examples: (1) an organization working on a campaign for health clinics in schools could incorporate health information in its base-building outreach, and (2) campaign research can develop young peoples’ academic research skills. This integration can bring a new dynamism and power to both youth organizing and youth development.

Tools Overview

STEP 1: FAMILIARIZE YOURSELF WITH THE COMMON DEFINITIONS AND ACTIVITIES OF YOUTH ORGANIZING AND YOUTH DEVELOPMENT.

Tool: Common Definitions and Activities of Youth Organizing & Youth Development

These tools provide basic overviews of youth organizing and youth development, introducing their basic definitions, components and activities. They are not interactive tools. Instead, they provide the “raw material” to be used in the following three tools. See the Resources section at the end of this toolkit to find deeper sources of information on youth organizing and youth development.

STEP 2: ASSESS THE YOUTH DEVELOPMENT NEEDS OF YOUR MEMBERS AS WELL AS YOUR ORGANIZATIONAL CAPACITY TO DO YOUTH DEVELOPMENT WORK.

Tool: Youth Development Needs Assessment

This assessment tool is designed to walk you through a planning process for integrating youth development into your youth organizing work. It begins with an assessment of the particular youth development needs of your base, contextualizing their needs in an analysis of institutional oppression. This section is designed to draw out the particular needs of different communities, acknowledging that different constituencies of young people have different experiences and different needs. The next section of the assessment encourages you to reflect on how your current organizing has the potential to integrate youth development activities. The final section walks you through a reflection on the particular youth development programs you would like to develop as well as an assessment of your actual capacity to run those programs.

STEP 3: UNDERSTAND THE PROGRESSION OF APPROPRIATE YOUTH ORGANIZING AND YOUTH DEVELOPMENT ACTIVITIES AS MEMBERS DEVELOP.

Tool: The Youth Organizing & Youth Development Ladder

This tool provides a method for thinking through the different stages of youth development and youth organizing work. Neither youth development or youth organizing are static activities; young people are always progressing in their development as political leaders and in their lives. Your programs need to reflect that development and maturation. This “ladder” gives you one way to think through those stages, beginning with youth organizing and youth development activities for new members and ending with activities for well-developed youth organizers.

STEP 4: FIND WAYS FOR THE YOUTH DEVELOPMENT WORK TO SUPPORT YOUR ORGANIZING AND FOR ORGANIZING TO DEVELOP YOUR YOUTH MEMBERS.

Tool: Youth Organizing & Youth Development Integration Worksheets

Youth development and youth organizing should not be dealt with as separate activities but as complementary activities that are most effective in combination. The integration of youth organizing and youth development helps young leaders to both develop as organizers and to build a healthy life. Youth development can manifest through youth organizing activities, and youth development activities can facilitate and strengthen the organizing process. Integrating these components can bring new life to social justice work. This integration tool walks you though the

major components of the organizing process, giving examples of ways in which organizing can be used to carry out youth development objectives. It provides space for you to reflect on how you would want to integrate youth organizing and youth development in your organizing model.

STEP 5: DEVELOP A WORKPLAN FOR AN INTEGRATED YOUTH ORGANIZING-YOUTH DEVELOPMENT PROGRAM.

There is no tool for this step because the work varies between organizations. You should draw out the assessments and reflections from the previous tools, and use your standard organizational workplanning processes to develop an integrated youth organizing-youth development workplan.

COMMON DEFINITIONS & ACTIVITIES OF YOUTH ORGANIZING & YOUTH DEVELOPMENT

YOUTH ORGANIZING		YOUTH DEVELOPMENT	
DEFINITION	COMPONENTS OF YOUTH ORGANIZING	DEFINITION	YOUTH DEVELOPMENT AREAS OF ABILITY
Youth organizing is a youth development and social justice strategy that trains young people in community organizing and advocacy, and assists them in employing these skills to alter power relations and create meaningful institutional change in their communities. Youth organizing relies on the power and leadership of youth acting on issues affecting young people and their communities. Young people themselves define the issues, and youth organizing groups support them as they design, implement and evaluate these efforts. Employing activities such as community research, issue development, reflection, political analysis and direct action, youth organizing increases civic participation and builds the individual and collective leadership capacity of young people. (FCYO Occasional Papers 1:4)	<p>Base-Building: Reaching out to and educating members of your constituency in order to engage them in organizational activities and recruit them to become members of your organization.</p> <p>Leadership Development: The constant work to develop new leaders while simultaneously deepening the leadership of more veteran members.</p> <p>Campaign Development: Building intensive, sustained, coordinated and strategic fights to win change around specific issues.</p> <p>Organizational Development: Building clear and stable organizational structures and systems that enable the participation of members and the long-term survival and growth of the organization.</p>	Youth development refers to the process all young people undergo as they build the individual assets or competencies (including academic, cognitive, civic, emotional, physical, social, cultural, and vocational) needed to participate in adolescence and adult life. All young people affluent or low-income, above grade or out-of-school—need a mix of services, supports, and opportunities in order to stay engaged. Youth development requires that young people have stable places, services and instruction, as well as supports: relationships and networks that provide nurturing, standards, guidance, and as opportunities for trying new roles, mastering challenges, and contributing to family and community. (FCYO Occasional Papers 1:4)	<p>Physical Health: The ability and motivation to act in ways that best ensure current and future physical health for self and others.</p> <p>Mental Health: The ability and motivation to respond affirmatively to and cope with positive and adverse situations, to reflect on one’s emotions and surroundings, and to engage in leisure and fun.</p> <p>Intellectual Ability: The ability and motivation to learn in school and in other settings, to gain the basic knowledge needed to graduate high school, to use critical thinking, to be creative, to use problem-solving and expressive skills, and to conduct independent study</p> <p>Employability: The ability and motivation to gain the functional and organizational skills necessary for employment, including an understanding of careers and options, and the steps necessary to reach goals.</p> <p>Civic and Social Ability: The ability and motivation to work collaboratively with others for the larger good and to sustain caring friendships and relationships with others.</p> <p>Cultural Ability: The ability and motivation to respect and affirmatively respond to differences among groups and individuals of diverse backgrounds, interests and traditions.</p>

(SOURCE: School of Unity and Liberation)

(SOURCE: AED / Center for Youth Development & Policy Research)

Sample Youth Organizing & Youth Development Activities

COMPONENTS OF YOUTH DEVELOPMENT	YOUTH DEVELOPMENT ACTIVITIES	COMPONENTS OF YOUTH ORGANIZING	YOUTH ORGANIZING ACTIVITIES
PHYSICAL HEALTH	Comprehensive Sex Education Nutrition Classes Self-Defense Classes Fitness Classes Yoga Classes Recreational Activities Alternative Healthcare	BASE-BUILDING	Street Outreach School-based Outreach Door-knocking Phone-banking Workshop Facilitation Flyering Event Planning
MENTAL HEALTH	Healing Circles Family Counseling Self-Esteem Development Meditation Classes	LEADERSHIP DEVELOPMENT	One-on-One’s Political Education Participation Political Education Facilitation Skills Trainings Participation Skills Trainings Facilitation
INTELLECTUAL ABILITY	Homework Support College Prep Classes College Guidance Counseling	CAMPAIGN DEVELOPMENT	Campaign Planning Research Action Planning Direct Actions Alliance-Building Public Speaking Negotiations Media Work
EMPLOYABILITY	Job Referrals Internship Program Time Management Training	ORGANIZATIONAL DEVELOPMENT	Membership Meeting Attendance Membership Meeting Facilitation Strategic Planning Communications Planning Graphic Design Technology
CULTURAL ABILITY	Learning Cultural Traditions Spiritual Practices Arts Programming	<div>YOUTH SUPPORT SERVICES</div> <p>Youth services are often an important <i>supplement to youth organizing and youth development, particularly for young people from oppressed communities.</i></p> <div><div><ul style="list-style-type: none">• Emergency Housing• Referrals• Rape & Sexual Assault Counseling• Domestic Violence Counseling• Crisis Counseling & Referrals• Suicide Hotline</div><div><ul style="list-style-type: none">• Mental Health Services• Healthcare Referrals• Legal Counseling• Substance Abuse Counseling• Immigration Counseling• Accessing Public Benefits• Parenting Classes</div></div>	
CIVIC AND SOCIAL ABILITY	Peer-to-Peer Mentorship Community-Building Activities Conflict Mediation Skills <i>See Youth Organizing Activities</i>		

Tool 2

YOUTH DEVELOPMENT NEEDS ASSESSMENT

What is the constituency of your organization (e.g., race, nationality, class, gender and sexuality)?

How are your members impacted by different systems of oppression? Please be as specific as possible. Use the chart below.

INSTITUTIONALLY: How have these systems shaped the institutions that impact the lives of your members (e.g., schools, social service agencies, law enforcement)?

INDIVIDUALLY: How have these systems impacted their development as healthy and well-adjusted individuals prepared to succeed and build healthy futures?

	INSTITUTIONAL IMPACT	INDIVIDUAL IMPACT
HISTORIC & CONTEMPORARY RACIAL OPPRESSION		
CLASS OPPRESSION & POVERTY		
GENDER OPPRESSION		
HETEROSEXISM & HOMOPHOBIA		
OTHER RELEVANT SYSTEMS:		

How does all this impact your organizing?

Following is a list of life crises and challenges that may emerge in the lives of your members. *CIRCLE* the types of crises and challenges that emerge REGULARLY in your membership. *UNDERLINE* the types of crises and challenges that SOMETIMES emerge in the lives of your membership.

If all of these crises emerge regularly, circle the ones that most seriously impact their lives and underline the ones that are present in their lives, but less pressing.

Eviction	Incarceration in juvenile justice system	Mental health crises
Homelessness	Immigration issues	Drug addiction
Lack of access to adequate food	Rape or sexual assault	Alcohol addiction
	Domestic violence	Targeted by hate attacks
Lack of access to medical care	Family crises	Youth-on-youth violence
Police harassment and/or brutality	Unplanned pregnancy	Post-Traumatic Stress
	Sexually Transmitted Diseases/Infections	Academic challenges

How do these crises and challenges impact their lives and life chances?

How do these crises and challenges impact their ability to participate in organizing?

Assess the following capacities in your membership:

Physical Health

1

2

3

4

5

Low

High

Mental & Emotional Health

1

2

3

4

5

Low

High

Self-Esteem and Self-Confidence

1

2

3

4

5

Low

High

Sense of Responsibility and Accountability

1

2

3

4

5

Low

High

Vision for future

1

2

3

4

5

Low

High

Relationships with family

1

2

3

4

5

Low

High

Personal support network (friends, mentors, etc.)

1

2

3

4

5

Low

High

Healthy romantic relationships

1

2

3

4

5

Low

High

Connection to cultural traditions

1

2

3

4

5

Low

High

Connection to community

1

2

3

4

5

Low

High

Ability to work with people from range of different communities

1

2

3

4

5

Low

High

Ability to deal with conflict productively

1

2

3

4

5

Low

High

Ability to work well with others

1

2

3

4

5

Low

High

Academic Skills

1

2

3

4

5

Low

High

Job Skills

1

2

3

4

5

Low

High

SUM-UP: Reflecting on your overall answers in this assessment section, what are the main support and developmental needs of your youth members?

How do these dynamics impact your organizing?

BUILDING YOUR ORGANIZATION'S YOUTH DEVELOPMENT CAPACITY

1. Integrating Youth Development into Youth Organizing

Base-Building: Can you address any of the developmental needs of your constituency through your base-building work?

Consider the following sample methods:

- ☐ *Distributing relevant materials during outreach: Know Your Rights information, health and service information or academic resources*
- ☐ *Conducting outreach workshops that introduce youth to aspects of their cultural traditions, health information and services, or academic services*
- ☐ *Organizing base-building events that help youth to connect to their cultural traditions*
- ☐ *Offering academic support and tutoring services as an outreach method*

What capacities can your youth members develop through doing base-building work that will help them in other arenas of their lives?

Leadership Development: How can you integrate personal and individual development into your work to develop young people as leaders?

Consider the following sample methods:

- ☐ *Check in with youth leaders about their personal lives during one-on-one check-ins*
- ☐ *Integrate knowledge of cultural traditions and practices into your political education*
- ☐ *Integrate personal development, healing work and community-building activities into leadership retreats*
- ☐ *Have youth who have struggled with particular issues find ways (like one-on-one conversations, discussion circles and workshops) to share those experiences with other members who may be dealing with similar issues*

What capacities can your youth members develop through their work to develop the leadership of other youth?

Campaigns: Can your organizing campaigns address the challenges facing your members by changing negative institutional practices or by increasing resources for community and youth development?

Consider the following sample campaigns:

- ☐ *A campaign to include Ethnic Studies curriculum in high schools to help young people develop a stronger connection to their cultural heritage*
- ☐ *A campaign for adequate health clinics in public high schools to meet the health needs of uninsured youth*
- ☐ *A campaign for a drop-in center for LGBT youth where they can build community, access health services and find emergency housing*
- ☐ *A campaign for institutional policies to protect young women against gender-based violence and harassment*

What capacities can your youth members develop through your campaign work that will help them in other arenas of their lives?

Organizational Practices: How can you integrate your youth members’ development into your organizational structures and practices?

Consider the following examples:

- ☐ *Developing a system where senior and alumni members provide mentorship to newer members*
- ☐ *Integrating cultural practices and traditions into membership meetings*
- ☐ *Develop an internal conflict mediation process, which will both help members resolve conflicts with each other and develop conflict resolution skills*
- ☐ *Treat your internship programs as opportunities to develop youth members’ employment skills*

What capacities can your youth members develop through your organizational practices that will help them in other arenas of their lives?

2. Developing Programs Focused on Youth Development

The following lists are drawn from youth support services and youth development programs offered by different youth organizing groups around the country.

Support Services: Reflecting on the main crisis support needs of your members, identify the support services that would be most relevant to your organization. And add your own to the list! *CIRCLE* the programs you want to be able to run internally. *UNDERLINE* the programs to which you would want to be able to refer youth.

Emergency Housing Referrals	Healthcare Referrals
Rape & Sexual Assault Counseling	Legal Counseling
Domestic Violence Counseling	Substance Abuse Counseling
Crisis Counseling & Referrals	Immigration Counseling
Suicide Hotline	Accessing Public Benefits
Mental Health Services	Parenting Classes

Youth Development: Reflecting on the main developmental needs of your youth members, identify the development programs that would be most relevant for your organization. And add your own to the list! *CIRCLE* the programs you want to be able to run internally. *UNDERLINE* the programs to which you would want to be able to refer youth.

CULTURAL ABILITY	PHYSICAL HEALTH	MENTAL HEALTH
Learning Cultural Traditions Spiritual Practices Arts Programming	Sex Education Nutrition Classes Self-Defense Classes Fitness Classes Recreational Activities Alternative Healthcare	Healing Circles Family Counseling Self-Esteem Development Meditation Classes
EMPLOYABILITY	INTELLECTUAL ABILITY	CIVIC & SOCIAL ABILITY
Job Referrals Internship Program Time Management	Homework Support Tutoring College Prep Classes College Guidance Counseling	Peer-to-Peer Mentorship Community-Building Activities Conflict Mediation Skills

List up to three services or development programs that you would like to develop internally. Then, think about how this particular program could interact with your organizing work (e.g., all lead members would receive intensive academic tutoring, we would incorporate support circles into every fourth membership meeting).

	PROGRAM	RELATIONSHIP TO ORGANIZING
1.		
2.		
3.		

List up to four services or development programs to which you would like to refer your youth members. Then, identify whether or not you already have relationships with organizations or individuals who provide those services.

	PROGRAM REFERRALS	RELATIONSHIPS
1.		<input type="checkbox"/> Already have relationships List: <input type="checkbox"/> Need to develop relationships
2.		<input type="checkbox"/> Already have relationships List: <input type="checkbox"/> Need to develop relationships
3.		<input type="checkbox"/> Already have relationships List: <input type="checkbox"/> Need to develop relationships

4.	<div><input type="checkbox"/> Already have relationships</div> <div>List:</div> <div><input type="checkbox"/> Need to develop relationships</div>
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The major challenges for youth organizing groups in developing youth services and youth development programs are **RESOURCES** and **CAPACITY**. These programs take a great deal of time and energy to run well; even running a strong referral program takes significant staff time and resources.

Develop two scenarios for implementing service provision, service referrals and youth development programs in your organization: (1) a “bare-bones” scenario addressing one or two of your priority areas, and (2) a “dream” scenario where you can provide a more holistic set of services

BARE BONES SCENARIO	DREAM SCENARIO
<div>PRIORITY AREA 1:</div> <div><input type="checkbox"/> Internal program</div> <div><input type="checkbox"/> Referral</div> <div>PRIORITY AREA 2:</div> <div><input type="checkbox"/> Internal program</div> <div><input type="checkbox"/> Referral</div> <div>RESOURCES NEEDED:</div> <div>RELATIONSHIPS NEEDED:</div>	<div>PRIORITY AREA 1:</div> <div><input type="checkbox"/> Internal program</div> <div><input type="checkbox"/> Referral</div> <div>PRIORITY AREA 2:</div> <div><input type="checkbox"/> Internal program</div> <div><input type="checkbox"/> Referral</div> <div>PRIORITY AREA 3:</div> <div><input type="checkbox"/> Internal program</div> <div><input type="checkbox"/> Referral</div> <div>PRIORITY AREA 4:</div> <div><input type="checkbox"/> Internal program</div> <div><input type="checkbox"/> Referral</div> <div>RESOURCES NEEDED:</div> <div>RELATIONSHIPS NEEDED:</div>

Assess your capacity and access to the resources needed to run these programs and referrals.

BARE BONES SCENARIO	DREAM SCENARIO
Do you currently have the staff capacity to develop and run these programs?	
How many additional staff would you need to implement these programs effectively?	
What qualities and skills will you be looking for in the staff members focused on this work?	

BARE BONES SCENARIO	DREAM SCENARIO
How much time would it take to develop these programs and integrate them into your organizing?	
What kind of physical infrastructure would be needed to run these programs (e.g., meeting space, access to work-out space, books, and so on)?	
Do you have financial resources to cover the costs of staffing and physical infrastructure?	

BARE BONES SCENARIO	DREAM SCENARIO
Where could you raise additional resources to cover these expenses? <i>(Remember that youth development funding and government funding are possible sources of support for this work, but that they come with more intensive reporting requirements.)</i>	
How will investing in these programs add to or detract from your organizing work?	

Given this assessment, what programming is realistic and strategic for your organization to develop?

Building Relationships with Service Providers: Many youth organizations have found that it’s important to be deliberate about building relationships with outside service providers who share your principles and who will provide respectful and culturally-relevant services to your youth members.

What are the principles that your allied service providers need to share?

Consider the following examples:

- ☐ They need to see young people as leaders with the capacity to solve their own problems, rather than seeing them as victims or problems.
- ☐ They need to understand the impacts of structural oppression in peoples’ lives and believe in societal transformation as a part of the healing process.
- ☐ They must be grounded in particular cultural traditions.
- ☐ They must understand and respect the needs and experiences of particular marginalized populations (e.g., homeless youth, transgender youth, gang-affiliated youth).

Where can you develop relationships with service providers who share your principles?

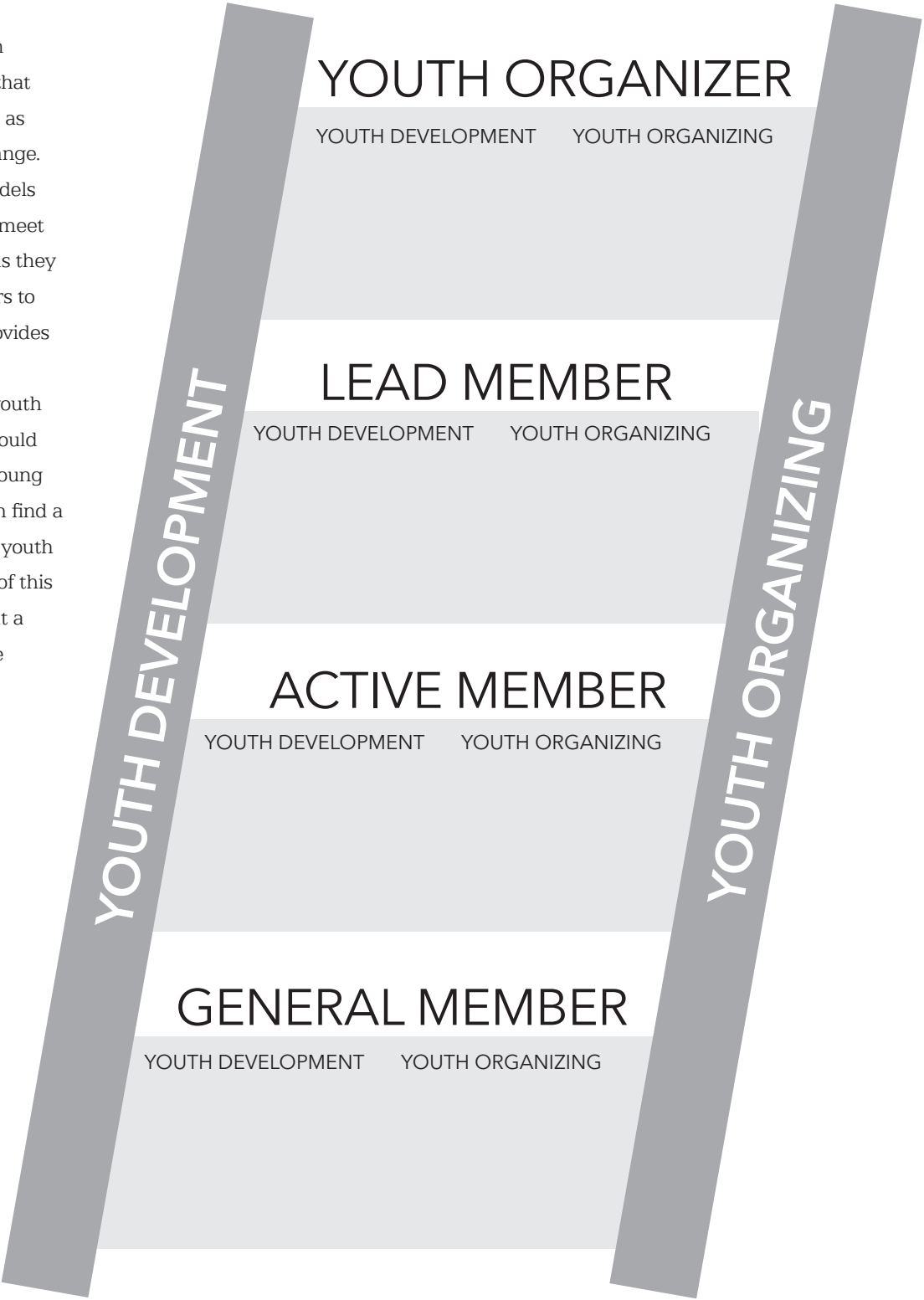
Consider the following examples:

- ☐ Word-of-mouth referrals from your organizational allies
- ☐ Identify service providers who share your principles through your campaign work
- ☐ Hold an open house for service providers to meet your organization
- ☐ Contact local professional associations of service providers
- ☐ Visit local professional schools where service providers are trained
- ☐ Encourage alumni members to enter professional training to become youth development and youth service providers

Tool 3

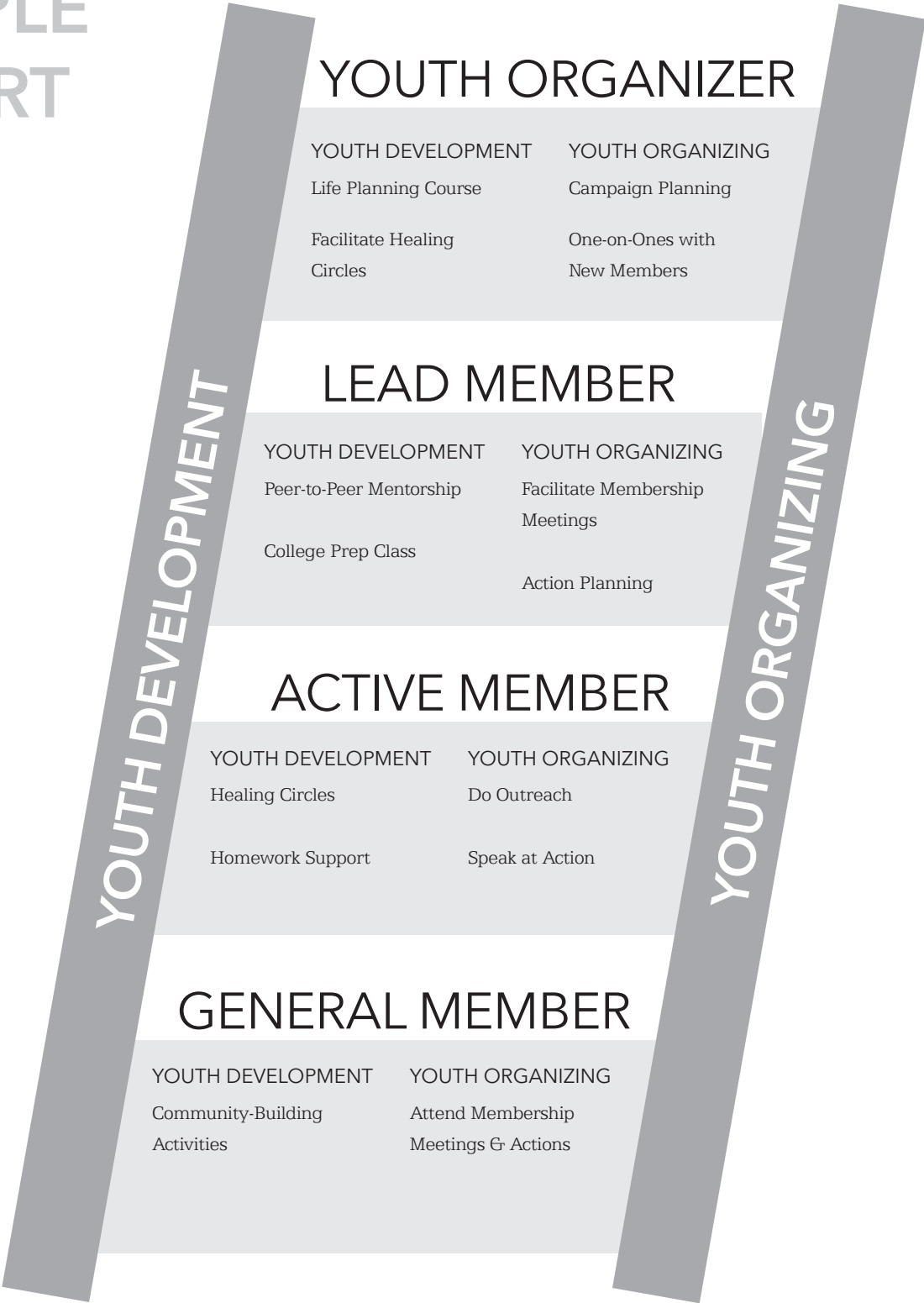
THE YOUTH ORGANIZING & YOUTH DEVELOPMENT LADDER

Youth organizing and youth development do not happen in one step. They are processes that develop and change over time as young people develop and change. Effective youth organizing models plan out different activities to meet the changing needs of youth as they develop from general members to youth organizers. This tool provides one way to plan out the youth organizing activities and the youth development activities that should take place at each stage in a young person’s development. You can find a list of youth development and youth organizing activities in Tool 1 of this chapter, and you can check out a sample filled-out ladder on the next page.

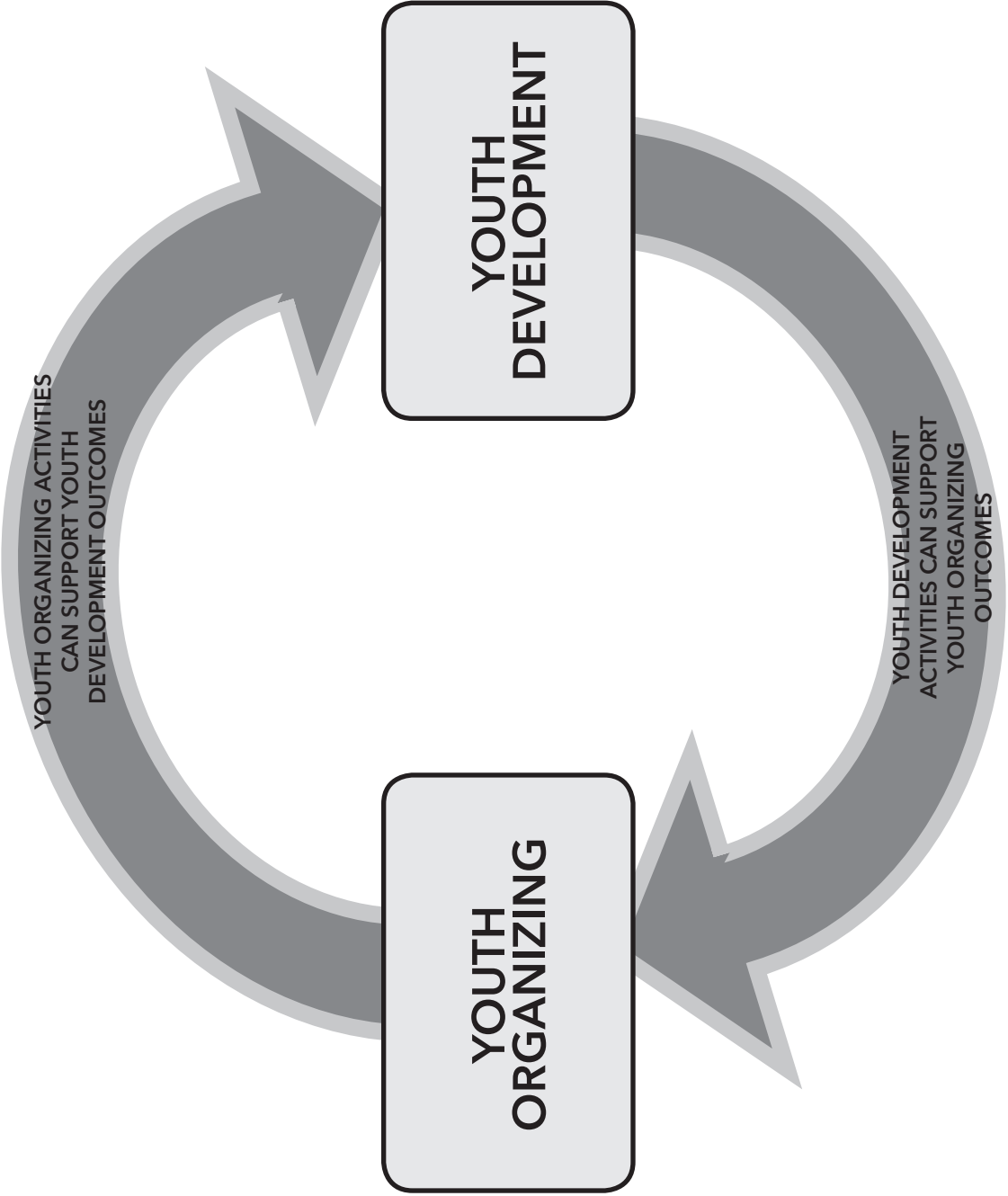


THE YOUTH ORGANIZING & YOUTH DEVELOPMENT LADDER

SAMPLE CHART



Tool 4
YOUTH ORGANIZING & YOUTH DEVELOPMENT INTEGRATION WORKSHEETS



BRIDGING THE DIVIDE:

INTEGRATING BASE-BUILDING AND YOUTH DEVELOPMENT

YOUTH ORGANIZING ACTIVITY		YOUTH DEVELOPMENT POTENTIAL	YOUTH DEVELOPMENT OUTCOMES	How can we integrate youth development into this organizing activity?
Base-Building: Reaching out to and educating members of your constituency in order to engage them in organizational activities and recruit them to become members of your organization.	Street Outreach School-based Outreach Door-knocking Phone-banking Outreach Workshop Facilitation	Youth organizers can provide information about physical health, mental health, community services and legal information while they are doing outreach. Doing outreach can help young people learn how to work with other people, to develop self-esteem and to develop a wide range of employment skills.	Physical Health Mental Health Employability Civic & Social Ability	
	Base-Building Event Planning	Running successful events can increase self-esteem. Running culturally-relevant events can help youth ground themselves in their cultural traditions. Learning to plan events can teach youth to think creatively and develop a wide range of employment skills.	Intellectual Ability Mental Health Employability Civic & Social Ability Cultural Ability	

The following youth development activities could be used to support the base-building component of youth organizing by providing different points of entry where young people can engage with the organization before jumping into explicitly political work:

- ☐ Wellness Classes
- ☐ Healing Circles
- ☐ Arts Programming
- ☐ Learning Cultural Traditions
- ☐ Access to Social Services
- ☐ Spiritual Practices
- ☐ Community-Building Activities

How can our youth development activities support our base-building work?

BRIDGING THE DIVIDE:

INTEGRATING LEADERSHIP DEVELOPMENT & YOUTH DEVELOPMENT

YOUTH ORGANIZING ACTIVITY	YOUTH DEVELOPMENT POTENTIAL	YOUTH DEVELOPMENT OUTCOMES	How can we integrate youth development into this organizing activity?
Leadership Development: The constant work to develop new leaders while simultaneously deepening the leadership of more veteran members	One-on-One's	Besides being an important tool for leadership development, one-on-one's can be used as a space for young people to get support for the challenges in their lives, and to get referrals to the services they need to build healthy lives. This can give youth space to develop healthy, supportive relationships with adults and other youth.	Physical Health Mental Health Employability Civic & Social Ability
	Political Education Participation	Political education can provide space for youth to reflect on how social and political systems have impacted their lives, to envision the lifestyles they want to develop and to develop critical-thinking skills.	Physical Health Mental Health Employability Civic & Social Ability
	Skills Training Participation	Skills trainings provide opportunities for youth members to develop a wide range of skills, from physical and mental health skills to practical job skills.	Physical Health Mental Health Intellectual Ability Civic & Social Ability Employability Cultural Ability
	Political Education Facilitation Skills Training Facilitation	Facilitating political education and skills training workshops can challenge young people intellectually. It helps them develop communications and teaching skills that can help young people find jobs in the future.	Intellectual Ability Employability Civic & Social Ability Cultural Ability

The following youth development activities could be used to support the leadership development component of youth organizing by increasing the life stability and self-esteem of emerging leaders, by increasing their practical leadership skills and by increasing their investment in the organization:

- ☐ *Healing Circles*

☐ *Academic Support Services*

☐ *Arts Programming*
- ☐ *Learning Cultural Traditions*

☐ *Spiritual Practices*

☐ *Community-Building Activities*

☐ *Access to Social Services*
- ☐ *Internship Programs*

☐ *Time Management Trainings*

☐ *Peer-to-Peer Mentorship*

☐ *Conflict Mediation Skills*

How can our youth development activities support our leadership development work?

BRIDGING THE DIVIDE:

INTEGRATING CAMPAIGN DEVELOPMENT & YOUTH DEVELOPMENT

YOUTH ORGANIZING ACTIVITY		YOUTH DEVELOPMENT POTENTIAL	YOUTH DEVELOPMENT OUTCOMES	How can we integrate youth development into this organizing activity?
Campaign Development: Building intensive, sustained, coordinated and strategic fights to win change around specific issues.	Power Analysis	Teaching young people to analyze the political balance of forces on an issue helps them to understand how, for example, governmental decisions are made and how they can influence those decisions. If done well, it can encourage young people to develop critical-thinking skills and learn not to rely only on their assumptions.	Intellectual Ability Civic & Social Ability	
	Campaign Planning	Campaign planning is an intellectually challenging activity, and it can be intentionally structured to develop reading, writing and critical-thinking skills. It can develop organizational and planning skills that increase young peoples’ employability.	Intellectual Ability Employability Civic & Social Ability	
	Research	Doing campaign research can teach young people research skills that will be applicable to academic research in school. Research methods are also valuable job skills. It will also help young people to learn about government policies and structures, increasing their civic awareness.	Intellectual Ability Employability Civic & Social Ability	
	Action Planning	Action planning teaches youth to set goals, plan for different scenarios and engage in problem-solving. It can develop organizational and planning skills that can increase young peoples’ employability.	Intellectual Ability Employability Civic & Social Ability	

	Participating in Direct Actions	By learning to navigate contentious situations deliberately, youth can develop the ability to navigate difficult life situations. Having to engage with powerful people and hold their ground can also increase self-esteem. Drawing on tactics that are reflective of young peoples’ cultural traditions can help them to become more grounded in their communities.	Mental Health Intellectual Ability Civic & Social Ability	
	Alliance-Building	Alliance-building requires youth organizers to build collaborative efforts out of diverse and often contradictory interests. This is an important social and civic skill-set, which requires youth to develop both relationship-building skills, cross-cultural awareness and critical-thinking skills.	Intellectual Ability Civic & Social Ability Cultural Ability	
	Public Speaking	Preparing for public speaking requires youth to develop the intellectual skill of developing and articulating a clear argument. Overcoming fears of public speaking can increase self-esteem. The ability to speak confidently in front of others can help youth in job interviews.	IMental Health Intellectual Ability Employability Civic & Social Ability	
	Negotiations	Negotiating with power-holders requires young people to evaluate the interests of different actors and to persuade them to change their positions. This requires analytical capacities, social skills, an awareness of power relations and self-confidence—all important youth development capacities.	Mental Health Intellectual Ability Civic & Social Ability Cultural Ability	
	Media Work	Similarly to public speaking, media work requires youth to develop the intellectual skills of developing and articulating a clear argument. Overcoming fears of speaking to reporters or in front of a camera can increase self-esteem. Media work requires youth to develop the ability to connect with people from a wide range of cultural backgrounds	Intellectual Ability Employability Civic & Social Ability Cultural Ability	

The following youth development activities could be used to support the campaign development component of youth organizing by developing many of the practical and intellectual capacities necessary to plan an effective campaign. Group cohesion and unity will help youth organizing groups weather the ups-and-downs of campaigns, and peer mentorship enables veteran youth organizers to pass past campaign lessons on to younger members.

- ☐ Academic Support Services
- ☐ Arts Programming
- ☐ Self-Esteem Development

- ☐ Training in Cultural Traditions
- ☐ Community-Building Activities
- ☐ Internship Programs

- ☐ Time Management Trainings
- ☐ Peer-to-Peer Mentorship
- ☐ Conflict Mediation Skills

How can our youth development activities support our campaign development work?

INTEGRATING ORGANIZATIONAL DEVELOPMENT & YOUTH DEVELOPMENT

YOUTH ORGANIZING ACTIVITY		YOUTH DEVELOPMENT POSSIBILITIES	YOUTH DEVELOPMENT OUTCOMES	How can we integrate youth development into this organizing activity?
<div>Organizational Development: Building clear and stable organizational structures and systems that enable the participation of members and the long-term survival and growth of the organization.</div> <div>Membership Meeting Attendance</div>		Membership meetings can provide young people with a sense of community and with a space to learn how to work cooperatively with their peers. Learning to deal with the small challenges and frustrations that take place in meetings helps youth develop coping skills for challenging life situations. Membership meetings can be used to help youth learn about their cultural traditions and/or to interact well with people from other cultural backgrounds.	Physical Health Mental Health Civic & Social Ability Cultural Ability	
	Base-Building Event Planning	Facilitating membership meetings helps youth develop a range of skills (public speaking, problem-solving, working cooperatively with groups) and develop self-esteem.	Intellectual Ability Employability Civic & Social Ability	
	Strategic Planning	By participating in strategic planning, youth develop capacities in problem-solving, critical-thinking, goal-setting and cooperative work. These skills help youth navigate social, academic and employment settings.	Intellectual Ability Civic & Social Ability	

	Communications Planning	Developing an organization's communications plan helps youth bring together creative thinking capacities with the analytical work to develop a clear and coherent message. Communications work is deeply connected with cultural work, encouraging youth to both ground themselves in their cultural backgrounds and to learn to communicate across cultural lines. Young people can utilize these skills in a wide range of employment opportunities.	Intellectual Ability Employability Civic & Social Ability Cultural Ability	
	Graphic Design	Designing organizational materials gives youth a chance to learn highly-desired graphic design skills, along with the capacity to develop and communicate a clear message. Youth can draw on and develop their artistic skills through graphic design work.	Employability Civic & Social Ability Cultural Ability	

The following youth development activities could be used to support the organizational development component of youth organizing by giving youth members practical skills as well as tools to build organizations reflective of their cultural traditions; these activities will also increase group cohesion:

- ☐ Training in Cultural Traditions
- ☐ Community-Building Activities
- ☐ Access to Social Services
- ☐ Internship Programs
- ☐ Time Management Trainings
- ☐ Peer-to-Peer Mentorship
- ☐ Conflict Mediation Skills
- ☐ Arts Programming
- ☐ Recreational Activities

How can our youth development activities support our organizational development work?

CONCLUSION

For generations, youth leaders have played a vital role in social justice struggles and movement building. For approximately the past 15 years, the concept of “youth organizing” has emerged to identify a particular kind of youth-driven activism that involves young leaders (in their teens and early twenties) organizing their communities to win key victories in the arenas of Educational Justice, Environmental Justice, Economic Justice, Gender and Sexuality Rights, and Racial Justice and Immigrant Rights—to name just a few movements.

Working across generations and movements, YO can be described as a multitasking practice, one that simultaneously leads important organizing campaigns, provides safe yet dynamic community spaces for youth living in under-resourced neighborhoods, develops new leaders for the social justice community at large, and addresses the holistic development of youth leaders (their spiritual, mental, physical development). These multilayered accomplishments are a huge asset to all who participate in social justice; they underscore the fact that effective movement building cannot be parsed into separate categories or “silos.” At the same time, multitasking also poses several challenges for YO practitioners and supporters. For starters, arriving at a comprehensive and agreed upon definition of YO has been no simple matter, as emphasis may be placed on a particular facet of YO depending on one’s perspective. There are those who privilege the role of community organizing that of youth development, and vice-versa. Meanwhile, others understand the primary function of YO as a leadership development “pipeline” that channels new leaders into broader social justice movements.

This challenge of definition is related to another major challenge that the Funders Collaborative on Youth Organizing has attempted to address head-on throughout the Roots Initiative Toolkit: The scarcity of documented resources that describe the values, principles and methods of the YO practice. Aside from notable exceptions (some of which are listed in the following Appendix), there are relatively few publications dedicated to unearthing and elucidating all that YO encompasses. This can be partly attributed to the relative newness of the field, as many of the groups that now self-identify as YO practitioners and supporters have only done so over the past 10–15 years. But, it also has much to do with how rare the opportunities are for YO practitioners to take pause from daily organizational work in order to document the rich, ongoing conversation on the evolution of the field. Over the years, the FCYO has learned that the process of defining YO is a process of holding an ongoing dialogue. This is not to question the stable characteristics that will always distinguish YO from other fields—namely, its mixture of intergenerational community organizing, youth development and leadership development. Rather, the open-ended dialogue implies that within these core elements the field is constantly learning new things about itself.

In conclusion, it can be said that the FCYO’s Roots Initiative Toolkit is merely an attempt to hold or frame the conversation at a particular moment in time. It is a snapshot of some of the present-day thinking and new knowledge that internally drives the YO practice. In this sense it resists having the final word. To the contrary, it is the hope of the FCYO that what you have read only serves to provoke new questions, challenge old assumptions and spark entirely new conversations.

Appendix RESOURCES

LEADERSHIP TRANSITIONS

Transition Guides: Online resources for organizations undergoing transitions, with specific resources designed for executive directors, boards and foundations.
<http://www.transitionguides.com>

CompassPoint Nonprofit Services: A nonprofit organization that provides reports, workshops and consultant support for organizations going through leadership transitions.
<http://www.compasspoint.org>

<i>Sample CompassPoint Resources</i>
<i>Up Next: Generation Change and the Leadership of Nonprofit Organizations</i> by Frances Kunreuther http://www.compasspoint.org/assets/66_etmono4upnext.pdf
<i>Founder Transitions: Creating Good Endings and New Beginnings</i> by Tom Adams http://www.compasspoint.org/assets/65_etmono3foundertransitions.pdf

Books & Articles

Gilmore, Thomas N. <i>Making a Leadership Change: How Organizations and Leaders Can Handle Leadership Transitions Successfully</i> . Jossey-Bass Publishers, 1988.
Adams, Tom. “Demystifying Executive Leadership Changes,” <i>Stone Soup</i> . Neighborhood Reinvestment Corporation, Spring 1997.
National Center for Nonprofit Boards. “Crisis or Opportunity? Executive Leadership Transitions,” <i>Board Member, Special Edition</i> . May 1997.

PARENT ORGANIZATIONS & FISCAL SPONSORS

Nonprofit Coordinating Committee of New York: NPCCNY offers a helpful checklist of things to think about in building a stable nonprofit called “The Things You Gotta Do to Start a Nonprofit Organization.”
<http://www.npccny.org/checklist.htm>

Nolo Press: Nolo offers both online resources and full books detailing the logistical and technical information you need to start your own nonprofit or to understand the ins-and-outs of fiscal sponsorship. A good place to start is “How to Form a 501(c)3 Nonprofit Corporation.”
<http://www.nolo.com/article.cfm/objectID/EA3D3043-9A88-43F5-8DC869639F0F6E77/111/262/ART/>

Foundation Center: The Foundation Center offers a thorough a helpful online tutorial titled, “Establishing a Nonprofit Corporation.”
<http://foundationcenter.org/getstarted/tutorials/establish/>

CompassPoint Nonprofit Services: CompassPoint’s “Nonprofit Genie” offers helpful advice on fiscal sponsorship as well as sample Memoranda of Understanding.
<http://www.compasspoint.org/askgenie/>

Books & Articles

Grey, Anne-Marie & Kim Skildum-Reid. *The Sponsorship Seeker’s Toolkit*. McGraw-Hill, 1999.

Colvin, Gregory. *Fiscal Sponsorship: 6 Ways to Do It Right*. San Francisco Study Center, 1993.

Martin, Patricia. *Made Possible By: Succeeding with Sponsorship*. Jossey-Bass Publishers, 2003.

INCITE! *Women of Color Against Violence. The Revolution Will Not Be Funded: Beyond the Nonprofit Industrial Complex*. South End Press, 2007.

YOUTH ORGANIZING & YOUTH DEVELOPMENT

Movement Strategy Center: MSC develops resources to build the field of youth organizing and to promote the integration of youth development and youth organizing.
<http://www.movementstrategy.org>

Forum for Youth Investment: FYI offers technical support and research to youth development organizations and organizations wishing to integrate youth development into their work.
<http://www.forumfyi.org>

Books, Articles & Reports:

Movement Strategy Center. *Bringing It Together: Uniting Youth Organizing, Development and Services for Long-Term Sustainability*. Movement Strategy Center, 2005. http://www.movementstrategy.org/media/docs/2502_BringingItTogether.pdf

Listen, Inc. *An Emerging Model for Working with Youth: Community Organizing + Youth Development = Youth Organizing*. Funders Collaborative on Youth Organizing, 2003. http://www.fcyo.org/attachments/Papers_no1_v4.qxd.pdf

Quiroz-Martinez, Julie, Daniel HoSang & Lori Villarosa. *Changing the Rules of the Game: Youth Development and Structural Racism*. Philanthropic Initiative for Racial Equity, 2004. <http://www.fcyo.org/attachments/YRE%20Report-%20Jan.pdf>

The Aspen Institute Roundtable on Community Change. *Structural Racism and Youth Development: Issues, Challenges and Implications*. The Aspen Institute, 2005. http://www.fcyo.org/attachments/aspen_youth_structural%20racism.pdf



THE FUNDERS COLLABORATIVE ON YOUTH ORGANIZING IS A MANAGED
PROJECT OF JEWISH FUNDS FOR JUSTICE.

