

Finding Fulfillment after Nonprofit Retirement

Retirement is especially hard for nonprofit leaders. Here's wise counsel from those who've been there.

By *Judith Alnes, Tom Adams, Robert Francis, Dennis McMillian, Kay Sohl, & Tim Wolfred*

Mission-driven leaders get up in the morning eager to advance a cause, to improve the world they live in. What happens to their passions when they retire? How do they make the transition from work that was fulfilling and central to their lives?

Several years ago, six of us, all retiring nonprofit leadership “boomers,” came together to reflect on our transitions to retirement. We began with a three-day retreat (see “Time to Retire?” on page 22 for the agenda).

We shared our feelings, hopes, and fears. We talked about how we found support and what moral compass guided us in this process.

The retreat was so helpful that we decided to have regular conference calls. During those calls, we found amazing commonalities and some interesting differences. For example:

Like most nonprofit leaders, we didn't expect to leave our nonprofit careers rich – and none of us did. We all faced some worry about our financial futures.

Some of us spent considerable time with financial planners to be sure we wouldn't outlive our resources. Others planned to address their financial security with some of the same ingenuity they'd used to meet nonprofit budgets.

We had different approaches to whether to do any paid work after retirement and, if so, how much. We all wanted to find meaningful roles in retirement but wrestled with how to find the right opportunities.

Our points of view on these issues evolved, and our decisions were incremental. They emerged through our discussions, over time, rather than coming through sudden revelation.



Five Themes

Our conversations uncovered five themes that can help others retiring from nonprofit leadership:

1. Fear and Loss: None of us were prepared for the waves of fear and loss that accompanied our retirement. Even when we championed our own departures, we experienced emotional upheaval.

The identities of many nonprofit leaders have become entwined with the identities of their organizations. As a result, their retirements may differ from those who have not pursued mission-oriented work.

As in all grieving, feelings of loss and fear of the unknown pop up when least expected. What is predictable is that there will be mixed feelings, and some will be quite uncomfortable.

The immensity of this life-changing moment shouldn't be understated or set aside. Going it alone without a support system makes it much more challenging.

In William Bridges' seminal book *Managing Transitions* (wmbridges.com), he notes that retirement is a time of many endings – and this is especially true for nonprofit leaders. We lose our organizations, our clout, our active standing in the community, the kudos and self-affirmation that came with our success, and our closeness to colleagues. Adjusting to these endings demands our full attention.

2. Letting Go: Handing the reins to a successor can be painful. Not only was it difficult to let go, but some of us faced reactions that hurt and blindsided us. It was distressing when our successors made decisions very different from the ones we would have made.

Emotional upheaval can occur even when the transition is to a trusted colleague who simply has a different leadership style. The upset may be magnified when there's a planned overlap period. Watching the changes up close and having your voice stifled can feel suffocating.

Indeed, the organizations we led have been altered as new leaders, and their boards, use their judgment – not ours – to make decisions. We've learned that time is an ally here. We've grown to understand that our organizations are living, changing organisms that truly weren't ours from the beginning. As with most difficult passages, the emotions ease over time as we get distance.

3. Limbo: After being so intensely engaged in an organization, it's normal to be plunged into limbo, confusion, and uncertainty when you leave. This feeling of being caught

“What happens to your passions when you retire?”

between two worlds is uncomfortable, but it's important not to rush through it.

It's in this zone of discomfort that you can prepare yourself for the new world awaiting you. Sit with the feelings of bewilderment. Taking time to let these feelings unfold now will help you find clarity in the next stage.

4. New Engagement: The passions for social change that motivated us to choose nonprofit careers didn't die when we left our full-time jobs. Some of us would have liked to find paid leadership work that was less exhausting than the jobs we just left. But that turned out to be a pipe dream.

The retiring leaders surveyed in the Building Movement Project (buildingmovement.org) came to similar conclusions. They too sought meaningful roles with less responsibility and more flexibility than the leadership positions they occupied. They too found that, if such opportunities do exist, they're rare. In truth, most nonprofit leadership roles require the same heavy lifting as the ones we left.

When we looked into volunteerism, we encountered problems, too. For some of us, the volunteer opportunities that presented themselves seemed extraneous after being in the driver's seat of an organization that fully reflected our personal values. For others of us, it's been all too easy to become overwhelmed by volunteer commitments that look too much like our careers – sans pay of course. We've come to understand that getting back in “up to our eyeballs” in another cause won't achieve our aims for healthy retirements.

We wondered if managing a limited consulting practice was an option. Many of us had worked as consultants in capacity building organizations so were perhaps uniquely prepared to transition to part-time consulting. Ultimately, we all have found consulting work that provides meaning and is contained in a way that allows time to attend to other retirement goals.

5. Self-Care: Few of us reach retirement age without health worries of our own or health crises among those for whom we care deeply. We've all faced bone-chilling losses. Despite boomers having the longest life expectancy ever – as one of our cohort members observed – we've reached the dying age. A true gift in retirement is the gift of time for self-care and physical activity that was all too easy to postpone when buried in work and endless responsibility. In fact, a new vitality can emerge when the mantle of nonprofit stress and worry gets replaced with the priority of self-care.¹

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One metaphor that our cohort adopted is that of the retiree as artist. In retirement, our canvas has changed. No longer are we painting the future of the organizations we led; we now have the once-in-a-lifetime opportunity to choose a new canvas and palette for the next stage in our lives. William Bridges calls this stage “new beginnings.”

What we are now seeing are fragments of what comes next. We are slowly crafting our next stages recognizing that no two paths will be the same, but each will be marked by the lessons that have been learned during this transition.

Action Steps

Even if you're not in the process of retiring right now, it's a good idea to get ready for the day you'll give up your job and transition to something else. Based on what we found helpful, here are suggestions to smooth any transition in your future:

Be ready for a hard day or two. Expect to grieve. Anticipate unpredictable reactions from colleagues.

Create time to think. The decisions you make now will have long-lasting effects on you, your family, and the organization you led.

Time to Retire?

HOW TO ORGANIZE A SUPPORT GROUP FOR RETIRING LEADERS

This outline is based on our experiences in organizing our own group and in starting a second group of retiring leaders.

First Steps

Identify a few retiring nonprofit leaders and ask them to join your group. Limit the group's size to no more than 10 people.

Begin with a conference call to plan a retreat. During this call, go over the agenda and ground rules for the retreat. Finalize any logistical details about the site, meals, and cost sharing. (Our approach was to look for donated space and share the costs of meals.)

Retreat Focus & Agenda

Our retreat began mid-afternoon on Day 1 and concluded mid-afternoon on Day 3.

Our goal was to provide a safe, relaxed environment for us to reflect on personal transition experiences.

Day 1 Agenda

Finalize ground rules to ensure confidentiality and personal safety.

Use an ice breaker to get to know each other. Explore our feelings about retirement.

After sharing a meal, participate in a group exercise to map out desired outcomes and identify hopes, fears, and concerns.

Get help early with all aspects of the transition – emotional, financial, physical, vocational, and spiritual.

Avoid quick or knee-jerk commitments. Less is more. Be deliberative with any “yes” you give. Consider a “sampler” approach to new undertakings. Promise yourself that you'll make minimal commitments in the first months after retiring.

Set a reasonable time frame for reimagining your life, including some real time off.

Take a sabbatical a year or two before departure to think about your next stage. Deb Linnel in her book about the Durfee Foundation's Sabbatical Program (durfee.org) says sabbaticals can be an important tool in the transition to retirement. When she spoke with retired leaders, they all said the sabbatical helped them understand what their

“Be deliberative with any “yes” you give.”

Day 2 Agenda

Review what our experience and the literature tell us about the challenges of life transitions. (Our discussion included a review of William Bridges' key concepts, detailed at wmbridges.com. Other approaches to change and transition were touched on as well.)

Explore our fears and other emotions in more detail.

Compare notes about how we're finding support.

After sharing a meal, discuss how values and spiritual practice support the transition experience.

Day 3 Agenda

Check in and reflect on discussions so far.

Address approaches to communicating about transition and managing the feelings involved.

Discuss how to move forward, how we'll stay in touch, and how to support one another.

Consider ways to make this experience more broadly accessible to other leaders.

Conference Calls

At the retreat, we decided to meet by conference call every six to eight weeks and to take turns leading the calls. The main purpose of these calls is to give updates on our transition experiences and receive feedback. Occasionally we discuss a topic suggested by one of us.

“Consider a “sampler” approach to new undertakings.”

permanent leave taking might be like and “decreased the emotional roller coaster – as sabbaticals themselves are very emotional for many leaders.”

Consider forming a group of peers to support you during and after the transition. (See “Time to Retire?” on page 22 for more information.)

Use this time to think about ways you can change the world – perhaps even more effectively now that you’re not leading an organization. Consider this a time of productive questioning. You might, for example, ask questions such as these:

- **Where is the place to stand or an avenue to use your considerable nonprofit experience** to contribute to the advancement of the nonprofit sector as a whole?
- **Does the intellectual distance retirement offers afford you opportunities to rethink how our society is organized**, to address the social and economic divide in America, and to tackle social ills?
- **How might your relationships with foundations advance changes** about which you are passionate?
- **What could you do to connect** with other retired nonprofit leaders? How might you help all retired nonprofit workers connect more easily?
- **How might you join** with other retirees to work for good in collaborative ways?

We invite you to be courageous in exploring these and other questions. This transition is an opportunity to re-imagine the next chapter in your life. Doing it deliberately is worth it. 

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FOOTNOTE

¹See resources at dontebbe.com.



Resources for Leaders in Transition

Transitions: Making Sense of Life’s Changes
(wmbridges.com)

Managing Transitions (wmbridges.com)

The Way of Transition: Embracing Life’s Most Difficult Moments (wmbridges.com)

The Nonprofit Leadership Transition & Development Guide (wiley.com)

Focus on Sustainability: A Nonprofit’s Journey
(forakergroup.com)

Chief Executive Transitions (boardsource.org)

Managing Executive Transitions: A Guide for Nonprofits
(compasspoint.org)

The Grace in Aging: Awaken as You Grow Older (wisdomexperience.org)

Conscious Living, Conscious Aging
(simonandschusterpublishing.com)

Let Your Life Speak (wiley.com)

Helpful Articles at NonprofitWorld.org

Is It Time for a Time-Out? Take Stock of Your Life
(Vol. 31, No. 4)

What to Do Before a Long-Term Leader Departs (Vol. 30, No. 5)

Outside the Comfort Zone (Vol. 25, No. 3)

Executive Transitions (Vol. 16, No. 3)

Planning to Succeed: Creating a Succession Plan
(Vol. 29, No. 3)

Why Wisdom Is Being Lost – & How You Can Capture It
(Vol. 27, No. 6)