

Navigating Leadership Transition

An Empedoclean Toolkit for Nonprofits Facilitator's Guide

For facilitators running the Organizational Self-Assessment with leadership teams, boards, and staff groups navigating a leadership transition.

Based on the three-phase Empedoclean framework: Rupture — Deliberate Pause — Conscious Reorganization

1. Purpose of This Guide

This guide is for anyone leading a group through the Navigating Leadership Transition self-assessment. The assessment tool is a 30-item, six-dimension instrument designed for nonprofit leadership teams, boards, and staff groups navigating a leadership departure. This guide provides session formats, facilitation prompts, interpretation support, and planning tools to make the assessment process productive and action-oriented.

The underlying framework draws on Empedocles' model of elemental rearrangement: leadership transitions are not simply losses but reorganizations of forces. The facilitator's role is to hold that reframe for the group, even when the conversation gets uncomfortable.

What the Assessment Measures

Dim	Name	Items	Core Question
A	Structural Resilience	1–5	<i>Can the org function without any single leader?</i>
B	Honest Diagnosis	6–10	<i>Can you candidly assess what the departure exposed?</i>
C	Deliberate Pause	11–15	<i>Are you resisting the rush to rebuild?</i>
D	Intentional Reorganization	16–20	<i>Are you choosing what to carry forward?</i>
E	Communication & Stakeholder Engagement	21–25	<i>Is information flowing transparently?</i>
F	Emotional & Cultural Well-Being	26–30	<i>Is the human side being honored?</i>

Each dimension contains five items scored on a 1–5 Likert scale, for a maximum of 25 points per dimension and 150 points overall.

2. Who Should Facilitate

This assessment works best when the facilitator is someone the group trusts and who is not directly implicated in the transition decisions. Good options include:

- A board member not involved in the search process
- An external organizational development consultant
- A trusted peer organization leader
- An internal staff member in a neutral, cross-functional role

Avoid having the interim leader or board chair facilitate. They may unintentionally signal preferred answers or inhibit honest scoring.

Facilitator Preparation Checklist

- Read the full Treatise section of the toolkit before the session
- Complete the assessment yourself to anticipate where the group may cluster or diverge
- Decide on individual vs. simultaneous group scoring (see Section 4)
- Set up the tool on a device visible to all participants, or print a paper scoring sheet (see Appendix A)
- Prepare the room for open discussion — circular or U-shaped seating works better than rows
- Block time after the results to discuss next steps — do not let the session end at the score reveal

3. Session Formats

Choose the format that fits your group size, time available, and the sensitivity of the transition.

Format A — Full Team Workshop (3 hours)

Best for: Organizations that want to surface divergent perspectives across staff levels and create shared ownership of next steps.

Time	Activity	Facilitator Action
0:00–0:15	Welcome & Context Setting	Introduce the Empedoclean framework. Explain that disagreement in scores is data, not dysfunction.
0:15–0:30	Read the Treatise (key sections)	Guide the group through the three phases. Use the infographic to orient visual learners.
0:30–0:55	Individual Scoring	Each participant scores independently. No discussion yet. Emphasize honesty over consensus.
0:55–1:15	Score Reveal & Dimension Averages	Collect scores, calculate averages per dimension. Display results on screen or whiteboard.
1:15–1:30	Break	Allow the group to absorb initial results informally.
1:30–2:15	Dimension Discussion	Use the discussion prompts in Section 5. Focus on the two lowest-scoring dimensions.
2:15–2:45	Action Planning	Complete the Action Plan worksheet (Appendix B). Name owners and deadlines.
2:45–3:00	Close & Commitments	Each participant states one thing they will do differently in the next two weeks.

Format B — Board Retreat Session (90 minutes)

Best for: Governing boards needing a focused, executive-level view of transition readiness.

Time	Activity	Facilitator Action
0:00–0:10	Framing	Brief overview of the Empedoclean framework. Emphasize the "rearrangement, not collapse" mindset.
0:10–0:30	Individual Scoring	Board members score independently. Collect on paper or a shared spreadsheet.
0:30–0:45	Score Review	Display aggregated dimension scores. Flag any dimension below 60%.

0:45–1:15	Focused Discussion	Use prompts for the two lowest dimensions. Ask: "What does this tell us about our governance role?"
1:15–1:30	Board Action Commitments	Each board member names one concrete commitment. Record in meeting minutes.

Format C — Leadership Team Check-In (60 minutes)

Best for: Senior staff or department heads doing a quick pulse check mid-transition, or when a full workshop isn't possible.

Time	Activity	Facilitator Action
0:00–0:05	Frame the Purpose	This is a pulse check, not a judgment. Scores will inform a follow-up plan.
0:05–0:20	Individual Scoring	Score independently. Submit to facilitator.
0:20–0:35	Display Results	Show dimension scores. Ask: "Which score surprises you most, and why?"
0:35–0:55	Priority Discussion	Focus exclusively on the lowest-scoring dimension. Name two concrete actions.
0:55–1:00	Schedule Follow-Up	Set a date for a full Format A workshop or the next check-in.

4. Scoring Logistics

Option 1 — Digital (Recommended)

Each participant opens the toolkit on their own device and completes the assessment individually. At the end, each person's results appear on their screen. The facilitator then collects the dimension scores verbally or via a shared document and calculates group averages for display.

- Advantage: Instant individual results; color-coded guidance is immediately visible
- Limitation: Requires reliable internet and devices for all participants

Option 2 — Paper Scoring Sheet (Appendix A)

Participants score on the printed sheet. The facilitator collects and averages each dimension. Best for groups where device use would create distraction or where some participants lack technology access.

- Advantage: No technology required; physical anonymity can increase honesty
- Limitation: Requires manual tallying; participants don't see their own color-coded results

Handling Score Divergence

Score divergence across participants is valuable data. When one person scores a dimension 4–5 and another scores it 1–2, that gap reveals differing vantage points, not a problem to resolve quickly. Use this prompt:

"We have a wide range of scores on this dimension. Before we average them, let's hear from someone on each end. What are you seeing that the other person might not be?"

Do not rush to consensus. The divergence often points to where the organization's blind spots live.

5. Discussion Prompts by Dimension

Use these prompts after scores are revealed. You do not need to address all dimensions in equal depth. Prioritize the one or two lowest-scoring areas.

Facilitator principle: Ask the question, then wait. Count to ten silently if needed. The first silence often gives way to the most honest response.

A. Structural Resilience

- Which processes would stall tomorrow if one more person left suddenly?
- Where does institutional knowledge live — in a system or in someone's head?
- If we had to onboard a new executive in 30 days, what would we not know how to hand off?

B. Honest Diagnosis

- What did this departure make visible that was already true before it happened?
- Is there anything we are avoiding saying out loud? What would happen if we said it?
- Are staff at every level feeling safe enough to name what is not working?

C. Deliberate Pause

- What decision are we most tempted to rush, and why? Is that pressure external or internal?
- What routines have stalled? Which of those did we actually need, and which were just habit?
- Who is synthesizing everything we are observing, and when will they report back?

D. Intentional Reorganization

- What are the three things we must carry forward from the previous leader's tenure?
- What would we change if we had the courage — and does this transition give us that opening?
- Does our hiring profile reflect where we are going, or where we have been?

E. Communication & Stakeholder Engagement

- Who is not in this room who needs to hear what we learn today?
- What is the rumor mill currently saying, and how close to true is it?
- Are we communicating more with funders and board than with frontline staff? If so, why?

F. Emotional & Cultural Well-Being

- Has anyone been given permission to acknowledge that this is hard?
- Who is carrying extra weight right now and not saying so?
- What would it look like to honor the departing leader's contributions without being trapped by them?

6. Interpreting Results

The tool automatically calculates results. Use this guide to help the group understand what the scores mean without oversimplifying.

Overall Score Guide

Overall Score	Rating	Recommended Response
120–150 (80–100%)	Strong Transition Readiness	Maintain current practices. Identify which strengths can support weaker dimensions.
90–119 (60–79%)	Moderate Readiness	Two or more dimensions need deliberate attention. Build a 90-day action plan.
60–89 (40–59%)	Significant Gaps	Multiple dimensions are underdeveloped. Consider external facilitation or a consultant.
Below 60 (< 40%)	Critical Vulnerability	Immediate intervention is needed. Escalate to the board. Seek outside support.

Dimension Score Interpretation

Each dimension is scored out of 25. Use these benchmarks:

Score Range	Meaning	Facilitator Move
20–25 (80–100%)	Strong — leverage this dimension	Acknowledge the strength and ask how it can support weaker areas.
15–19 (60–79%)	Developing — targeted attention needed	Name the specific items scored lowest and ask what would change them.
10–14 (40–59%)	Significant gap — clear action required	Dedicate the most discussion time here. Ask what is blocking progress.
Below 10 (< 40%)	Critical — escalate or seek outside help	Be direct: "This dimension needs more than we can address today. Who should we bring in?"

What to Do With the Strongest Dimension

Groups often focus only on gaps. Equally important: identify the highest-scoring dimension and ask how the organization can use that strength to support areas of weakness. For example, if

Communication is strong but Structural Resilience is low, a well-run communication strategy can accelerate the documentation and knowledge-transfer work.

7. Closing the Session

How you close matters as much as how you open. Avoid ending on the score reveal alone — that produces anxiety without direction.

Recommended Closing Sequence

1. Name the top two priority dimensions aloud as a group. Write them where everyone can see.
2. For each priority, identify: one action, one owner, one deadline.
3. Surface one strength the group can rely on during the transition.
4. Ask each participant to state one thing they will do differently in the next two weeks.
5. Schedule the follow-up — either a check-in using the same assessment in 60–90 days, or a working session to address the priority dimensions.

Closing Reflection Prompts

Choose one or two for a brief close:

"What did you learn today that you didn't know this morning?"

"Which score surprised you the most?"

"What would Empedocles say to your organization right now?"

"What is one thing this transition is making possible that wasn't possible before?"

Reassessment Schedule

Plan to repeat the assessment at these intervals:

- 30 days after the session — brief check-in on Format C
- 60–90 days — full reassessment using Format A or B
- First 90 days of new leader tenure — use results to brief the incoming leader

8. Common Facilitation Challenges

The group clusters around 3s (neutral)

Midpoint clustering usually signals fear of conflict, not genuine neutrality. Try:

- Ask participants to reconsider any question they scored 3 and push to a 2 or 4
- Normalize disagreement: "A 3 means you're unsure, not that things are average. What would need to be true for this to be a 4?"

One person dominates the discussion

Use round-robin structures: go around the room and ask each person to respond to a prompt in one sentence before opening discussion. This prevents the loudest voice from setting the frame.

The group wants to litigate the departure

The assessment is forward-looking. If the conversation turns to assigning blame for the transition itself, redirect:

"We can hold a separate conversation about what happened. Right now, our job is to understand where we are and what we need to do next."

Scores are very low across multiple dimensions

Low scores across the board are not failure — they are clarity. Treat it as useful data and resist the urge to soften the results. Say:

"This is exactly why we're doing this. Now we know where the work is. That's better than guessing."

The group wants to move straight to solutions

Remind the group that the Deliberate Pause dimension exists for a reason. A quick pivot to action planning before understanding is reached tends to produce surface-level fixes. Hold the diagnosis phase for at least 20 minutes before opening the action planning worksheet.

Appendix A — Paper Scoring Sheet

Distribute this page when running the assessment without devices. Each participant scores independently, then submits the sheet to the facilitator for aggregation.

Name (optional): _____ Date: _____

Instructions: For each item, circle a number from 1 (Strongly Disagree) to 5 (Strongly Agree).

A. Structural Resilience	
1. Key organizational processes are documented and accessible.	1 2 3 4 5
2. Decision-making authority is distributed across multiple roles.	1 2 3 4 5
3. Critical external relationships are maintained by more than one person.	1 2 3 4 5
4. We have a succession plan in place.	1 2 3 4 5
5. Institutional knowledge is stored in shared systems, not just in individuals' heads.	1 2 3 4 5
Dimension A Total (max 25):	_____ / 25
B. Honest Diagnosis	
6. Leadership acknowledges the organization was over-reliant on the departing leader.	1 2 3 4 5
7. We have identified specific vulnerabilities this change has revealed.	1 2 3 4 5
8. Staff feel safe raising concerns without fear of reprisal.	1 2 3 4 5
9. We distinguish between problems caused by the departure and pre-existing problems.	1 2 3 4 5
10. Board members and senior staff have had candid conversations about the current state.	1 2 3 4 5
Dimension B Total (max 25):	_____ / 25

C. Deliberate Pause		
11. We have resisted rushing to hire a replacement without assessing needs first.	1 3 5	2 4
12. We have mapped which routines and decisions have stalled.	1 3 5	2 4
13. We are distinguishing valuable practices from merely habitual ones.	1 3 5	2 4
14. Staff at all levels have been invited to share their observations.	1 3 5	2 4
15. We have a defined interim leadership structure that provides stability.	1 3 5	2 4
Dimension C Total (max 25):	_____ / 25	
D. Intentional Reorganization		
16. We have identified core cultural values to preserve through this transition.	1 3 5	2 4
17. We have acknowledged outdated practices we are ready to leave behind.	1 3 5	2 4
18. The hiring process reflects current and future needs, not nostalgia.	1 3 5	2 4
19. We are using this transition to reduce vertical dependency.	1 3 5	2 4
20. A comprehensive onboarding plan is being developed for the incoming leader.	1 3 5	2 4
Dimension D Total (max 25):	_____ / 25	
E. Communication & Stakeholder Engagement		
21. Staff receive regular, transparent updates about the transition.	1 3 5	2 4
22. External stakeholders have been appropriately informed and reassured.	1 3 5	2 4

23. The board is actively engaged — not absent or micromanaging.	1 3 5	2 4
24. There is a clear point of contact for staff questions.	1 3 5	2 4
25. The narrative around the transition is honest — not catastrophizing or falsely optimistic.	1 3 5	2 4
Dimension E Total (max 25):	_____ / 25	
F. Emotional & Cultural Well-Being		
26. Staff morale is being actively monitored and supported.	1 3 5	2 4
27. People have space to grieve the loss of the previous leader.	1 3 5	2 4
28. Steps are being taken to prevent burnout during the transition.	1 3 5	2 4
29. There is a sense of shared purpose and mission continuity.	1 3 5	2 4
30. The organization is approaching this transition with a growth mindset.	1 3 5	2 4
Dimension F Total (max 25):	_____ / 25	
Overall Total (max 150):	_____ / 150	

Appendix B — Transition Action Planning Worksheet

Complete this worksheet as a group following the score review and discussion. Aim to name three to five concrete actions, each with a clear owner and a deadline no more than 60 days out.

Organization: _____ Session Date: _____

Facilitator: _____

Highest-Priority Dimension	Score	Percentage
First Priority: _____ _____	___ / 25	___%
Second Priority: _____ _____	___ / 25	___%
Greatest Strength: _____ _____	___ / 25	___%

Action Items

Priority Action	Dimension	Person Responsible	Deadline	Resources Needed

Group Commitments

Each participant names one personal commitment for the next two weeks:

1. _____
2. _____

3. _____
4. _____
5. _____
6. _____

Follow-Up Plan

Date of next check-in: _____

Format (circle one): 60-minute pulse check Full reassessment Board session

Person responsible for scheduling: _____

"When everything falls apart, it's not always the end. Sometimes, it's the necessary rearrangement before a stronger foundation can emerge."

— Empedoclean Leadership Transition Framework