

Succession Done Right

What Nonprofit Boards Can Learn

from the Leadership Transition at Cassia





Executive Summary

This piece explores what nonprofit boards can learn from the leadership transition at Cassia, one of the largest senior living organizations in the Midwest. Drawing from direct involvement in the process, it highlights how early planning, clear communication, and a disciplined search approach can turn succession into a moment of strength rather than uncertainty. The insights offered provide boards with a practical perspective on how to approach leadership transitions with clarity, alignment, and a long term view of stewardship.

Introduction

Across the nonprofit senior living sector, leadership transitions are accelerating. Many CEOs who built and led organizations through decades of expansion are now approaching retirement at the same time the industry is facing unprecedented complexity. Workforce shortages, rising operating costs, changing reimbursement models, and growing consolidation across the sector are reshaping the strategic landscape for nonprofit providers.

For boards, these realities elevate one responsibility above nearly all others: ensuring strong leadership continuity. Yet many boards begin thinking seriously about CEO succession only after a retirement announcement has already been made. Others struggle with difficult questions:

-  **When should succession planning begin?**
-  **How transparent should the process be with staff and stakeholders?**
-  **Should the board conduct a national search if an internal leader already exists?**
-  **How can an organization maintain stability while preparing for leadership change?**

Few boards have the opportunity to observe a transition that unfolds thoughtfully from beginning to end. Cassia, one of the largest nonprofit senior living organizations in the Midwest, offers a compelling example of what intentional succession planning can look like when it is approached early, transparently, and collaboratively.




After having a front-row seat to this succession process as the board's executive search partner, I later hosted a conversation with Cassia's retiring President and CEO Bob Dahl and his successor Matthew Kern to reflect on the transition that brought Kern into the role. Their story reveals not only the mechanics of succession planning but also the leadership values, governance decisions, and organizational trust that made the transition successful.

For nonprofit boards, their experience offers practical insight into how to approach one of the most consequential responsibilities a board will face. Having worked alongside boards through leadership transitions like this one, I have seen firsthand that the difference between a disruptive transition and a strengthening one often comes down to preparation, clarity, and trusted partnership.

Succession Planning Begins Earlier Than Most Boards Expect

For Bob Dahl, the succession conversation did not begin with a retirement announcement. It began years earlier. "I think it probably started when I turned sixty," Dahl reflected. "The runway was getting shorter, and it was time to begin thinking about a timeline for the organization." That moment of personal reflection soon became a governance priority for the Cassia board.

Rather than waiting for a formal retirement date, the board's compensation committee began reviewing the organization's succession framework. Over the course of roughly a year, the committee worked through a series of key questions that many boards avoid addressing until the final stages of a CEO's tenure.

-  **How much notice should the board expect before a leadership transition?**
-  **What process should be followed to evaluate candidates?**
-  **Should internal candidates be prioritized, or should the organization conduct a full search?**

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The result was a concise but highly practical succession document adopted by the board. One of its most significant provisions was the expectation that the CEO provide 18 months of notice prior to retirement. That timeline included six months of confidential planning between Dahl and the board before any public announcement.

In hindsight, Dahl believes that decision made a substantial difference. “It was a long time for me personally,” he said, “but it gave the board time to get organized and prepared before we went public.” By the time the transition announcement was made, the board had already established the search committee, engaged an executive search partner, and mapped out a communication strategy for employees, residents, families, and stakeholders. For the organization, the message was clear: the transition was planned, not reactive.

Transparency Strengthened Organizational Trust

Leadership transitions often generate uncertainty within organizations. When timelines are unclear or rumors begin circulating, employees and stakeholders may worry about stability or future direction. One of the defining characteristics of Cassia’s transition was the commitment to transparency. Rather than allowing speculation to build around his eventual retirement, Dahl chose to communicate openly with the board and senior leadership about the timeline and planning process. For Matthew Kern, who was serving as a senior leader within the organization at the time, that openness had a significant impact. “There wasn’t a lot of room for interpretation,” Kern explained. “In some organizations, people spend years wondering when the leader is going to retire. That wasn’t the case here.”



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He believes that transparency helped the organization remain focused on its mission during the transition. “This wasn’t driven by crisis or fatigue,” Kern said. “It was prompted by a desire to be faithful.” Prayer and discernment were also central elements of the transition process. Board members and members of the leadership team prayed regularly as the succession process unfolded, grounding the decision-making process in the organization’s mission and values. That shared commitment helped create alignment among leaders throughout the organization.

Why the Board Chose a Full National Search

One of the most important decisions the Cassia board made was to conduct a national search for the next President and CEO, even though many believed the successor was already clear.

“There was really one viable internal candidate,” Bob Dahl acknowledged. “Everybody understood that.” That candidate was Matthew Kern.

Yet, the board remained committed to a full search process for two reasons. First, they wanted to ensure they were identifying the strongest possible leader for Cassia. Second, they wanted to protect the credibility of the

internal candidate if he ultimately emerged as the right choice.

“If the board ultimately chose the internal candidate,” Dahl said, “no one could say they just rubber-stamped the decision. He would have earned it.”

Kern strongly supported that approach. “It was important to me that the process be competitive and rigorous,” he said. “It wasn’t about proving anything. It was about the integrity of the process and making sure the best leader for Cassia was chosen.” That alignment between the outgoing CEO, the board, and the internal candidate helped ensure that the search process strengthened the organization rather than creating division. Ultimately, the process confirmed that Matthew Kern was the right leader to guide Cassia into its next chapter.

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— Bob Dahl

The Role of an Experienced Search Partner

The Cassia board also made an early decision to engage an experienced executive search partner to guide the process. The board retained CarterBaldwin Executive Search, a firm with deep experience in nonprofit leadership search and transitions. While some questioned whether an external search firm was necessary, particularly given the presence of an internal candidate, both Dahl and Kern believe the partnership added significant value. Kern reflected that the search partner helped bring structure and discipline to the process while also expanding the board's perspective. "There were people who wondered why we needed a search firm," he recalled. "But having a search partner with deep experience in leadership transitions added credibility and structure to the process."

The search partner helped the board evaluate external candidates, assess leadership alignment, and structure the evaluation process with rigor and clarity. Just as importantly, the partnership provided ongoing counsel to the board throughout the process, helping them navigate key decisions, pressure-test assumptions, and move forward with confidence.

For the board, this combination of objective perspective and trusted guidance created a disciplined framework for making one of the most important leadership decisions in the organization's history.

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Internal Leadership Capacity Matters

Both Dahl and Kern also emphasized the importance of strong internal leadership support during the transition. Cassia's Chief Human Resources Officer played a central role in coordinating internal communication, supporting the search committee, and managing the logistics of the transition process.

"She was a tremendous partner to the search committee," Dahl noted. "Someone inside the organization has to have the capacity and knowledge to support the process." Her leadership helped ensure that communication with employees, residents, families, and partners remained clear and consistent throughout the transition.

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A Transition Rooted in Stewardship

For Bob Dahl, the leadership transition at Cassia was ultimately about stewardship. After more than three decades of leadership, he believed his responsibility was not only to lead the organization well during his tenure but also to ensure it would continue to thrive long after he stepped away. That mindset shaped every step of the succession process from early planning to transparent communication and a rigorous search.

Today, Matthew Kern leads Cassia as President and CEO, building on the strong foundation Dahl and the board intentionally worked to preserve.

Having worked closely with the Cassia board throughout this process, I was reminded that successful succession planning is not simply about identifying the next leader. It is about preparing the organization to move forward with clarity, confidence, and unity.

When succession planning is approached with intentionality, transparency, and trust, a leadership transition does not disrupt an organization. It strengthens it.

For boards, not just in nonprofit senior living, but across all nonprofits, the lesson is clear: Leadership transitions are not simply about replacing a CEO. They are about safeguarding the mission, strengthening governance, and preparing organizations for the future. When succession planning is approached with intentionality, transparency, and trust, a leadership transition does not disrupt an organization. It strengthens it.



About CarterBaldwin Executive Search

CarterBaldwin Executive Search partners with boards and leadership teams to recruit senior leaders and support successful leadership transitions across nonprofit, higher education, and mission-driven organizations.

If you would like to know more about how CarterBaldwin can assist in your succession planning or pending executive search, email us at gwilliams@carterbaldwin.com or visit www.carterbaldwin.com.

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Dr. Gerri Williams brings a powerful combination of real-life experience, recruiting and search management expertise, and a dynamic leadership style to her work at CarterBaldwin. Since joining the firm, she has led higher education and global nonprofit president and cabinet searches, partnering with key leaders, Boards of Directors, Trustees, and search committees in successful placements.

Prior to joining CarterBaldwin, Dr. Williams served in key leadership positions with both private and public institutions of higher education, including the University of North Carolina at Chapel Hill, Our Lady of the Lake University, and the University of Texas at San Antonio. She also founded a consulting firm, which secured over \$23M in grant funding for educational institutions and nonprofits. Dr. Williams holds a BA in interdisciplinary studies and an MA in adult and higher education from the University of Texas at San Antonio and earned her EdD in educational leadership with a specialization in higher education from Lamar University.