Planning for Continuity in an Era of Staff, Leadership and Board Transitions
The Food Bank of Western Massachusetts
Please tell us about you

- Your Role in Nonprofits
  - Board member
  - Staff leadership
  - Nonprofit HR
  - Program Manager
  - Volunteer
  - Consultant
  - Other
About Interim Executive Solutions

- In operation for eight years

- Business and nonprofit professionals dedicated to strengthening the nonprofit sector during leadership and business transitions
  - Interim leadership (executive, financial, development)
  - Board Consulting (resilience, succession, governance, strategic vision)
  - Mentoring (capacity building with board and staff)

- Our team includes over 75 Associates throughout the NorthEast
  - Wide range of experiences and knowledge
  - Collaborate to address specific client needs
Agenda

- Why are transitions happening
- Retention strategies
  - Staff
  - Leadership
- Planning for transitions
  - Readiness
  - Succession planning
- Options when you’re not ready
Post-Covid Staffing Environment is Challenging

- **Great resignation**
  - Lots of jobs available at increasing pay
  - Gen Z and millennials are less loyal but perhaps more idealistic

- **Covid-19 has disturbed culture and operations**
  - Planned and unplanned layoffs
  - Increased workload and stress

- **Competition for new leaders**
  - Planned retirements are no longer being delayed
  - Search firms are backlogged and salaries are rising

- **Newer leaders may have less experience**
Drivers of Leadership Turnover

- Planned retirements / new opportunities
- Burnout
- Not meeting Board objectives / desired impact
- Organizational dysfunction
- Breaches of ethics
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Strategies to Retain Key Staff & Volunteers

- **Focus on culture**
  - Connection and collaboration
  - Inclusion and equity
  - Flexibility e.g., sabbaticals, days off for volunteers
  - Meals/events together

- **Clear roles and responsibilities**
  - Cross-training and teamwork
  - Co-leadership models
  - Compensation studies to ensure competitive salaries

- **Transparency and communications**
  - Opportunities for feedback
  - Demonstrate listening

- **Appreciation**
  - Volunteer recognition
  - Days off done in a meaningful and purposeful way
  - Shared responsibilities to help shoulder the load
Fostering Diversity, Equity, Inclusion, Belonging - EDIB

- Prioritizing professional development
- Providing leadership opportunities for staff and volunteers alike
- Where are you getting your volunteers from?
  - Have a diverse pool of volunteers
  - Try to represent the communities you serve
- Constituting diverse hiring teams
- Implementing anti-bias training
- Establishing allies and allyship / mentoring
Strategies to Retain and Develop Leaders

- Curiosity and support
  - Open, honest communications with and from the Board
  - Availability / access

- Clear roles and responsibilities for Board vs. ED
  - Governance and strategic vision vs. implementation
  - Ensuring adequate resources
  - Oversight and monitoring of key metrics

- Engagement, feedback and appreciation
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Readiness for Staff and Volunteer Transitions

- Succession plan elements
  - Coverage for short-term vacancies
  - Qualifications and characteristics for permanent replacements
  - Potential reorganization of duties if key roles are open

- Key issues
  - Know what people are doing
  - Know what needs to be done
  - Know what people are capable of doing
  - Know what people are willing to do
  - Prioritize Equity, Diversity, Inclusion, Belonging - EDIB
  - Identify professional development resources

Succession Planning is Capacity Building
Readiness for Leadership Turnover

- **Strategic plan is current and being actively implemented**
  - Board vision is unchanged or clear

- **Solid operations**
  - Well documented and implemented policies and procedures
  - Financial stability / sustainability

- **Leadership is being cultivated at all levels within the organization**
  - Regular performance reviews with growth plans
  - Investment in Professional Development
  - Staff policies reflect valuing employees
  - Salaries and benefits are in line with the market

- **Board is functioning smoothly and effectively**
  - Stable leadership, committees are in place, clear about their priorities

- **Effective partnerships and communications with funders and stakeholders**
Planning to Promote from Within Work

- Allow adequate time and resources to cultivate future leaders

- Alignment around the future vision for the organization
  - Do prospective leaders share that vision and have the knowledge to achieve it?

- Build the capacity of potential leaders
  - ED distributes responsibilities to provide opportunities to lead well before the transition

- Make sure the Board understands the needs of the organization
  - Departing ED must be transparent, inclusive and communicative

- Build relationships and visibility between the Board and staff leaders
  - Board still makes ultimate selection

- Prepare the leadership team and Board to support the prospective new leader
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When does a Planned Search Work

- When the Board understands the needs of the organization
  - Departing ED is transparent, inclusive and communicative
  - Board articulates the future vision to staff and stakeholders

- When adequate time and resources have been set aside
  - Search process typically takes 4-6 months

- When ED is committed to a smooth transition

- When Board takes the opportunity to engage with staff leaders
  - Uncover priorities and build trust as to the future of the organization

- When the leadership team is in place and in support
  - Members of the leadership team should be encouraged to apply if appropriate
Why do New EDs Who Follow Long-term EDs Often Fail

- Expectations are not realistic
  - Next ED will inevitably lead differently, culture may shift if coming from outside

- Board often does not understand the needs or capacity of the staff
  - Gaps between skills of new ED and needs of the organization

- Boards may be looking for something new
  - Change agents often encounter resistance and sour relationships

- New ED may uncover issues that were never surfaced
  - Long-term EDs tend to be trusted and minimally questioned
  - Significant issues can stay dormant for years
A Rare Opportunity: Interim Leadership

- Opportunity to stabilize and strengthen the organization
  - Empower the team and build confidence in the future
  - Define roles and responsibilities
  - Set the stage and increase attractiveness to a new leader

- Opportunity to enable Board to set priorities and clarify vision
  - Learn about the needs of the organization
  - Build foundation for a successful search

- Opportunity for objective assessment of the current state and what is needed
  - Operations
  - Governance
  - Sustainability
  - Key characteristics for the next ED
# Interim Leadership Options

## Pros
- **Board member**
  - Often take reduced / no salary
  - Know the organization
- **Key staff (or staff committee)**
  - Low incremental cost
  - Known to the staff (hopefully respected)
  - Trial period for a potential ED
- **Professional Interim**
  - Bring leadership experience
  - Provide objective assessment of org
  - Focus on the team and operations
  - Not candidate for ED
  - Can identify key characteristics and priorities for the next ED

## Cons
- **Need to step down from Board**
  - Typically have other responsibilities
  - May not objectively assess the org
- **Often maintain dual roles**
  - Typically have other responsibilities
  - May not objectively assess the org
  - Likely to leave if they are not selected
- **Typically cost the same as the ED**
Interim Executive Solutions Process

- Identify Associates well qualified to provide interim leadership
  - Allow client to select best cultural fit
  - Handle contracting and billing

- Provide ongoing support for interim ED and Board through Partner Liaison
  - Ensure objectives of transition are met
  - Identify supplemental resources that may be of value
  - Help Board establish vision and values, and strengthen governance

- Recommend search firms and other resources to consider
  - IES does not provide search services
  - Support the search and onboarding of the new ED
Questions and Comments

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