



Interim Executive Solutions

GETTING YOU TO WHAT'S NEXT

# 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

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- Key staff (or staff committee)
  - Low incremental cost
  - Known to the staff (hopefully respected)
  - Trial period for a potential ED

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- 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

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- Often maintain dual roles
  - Typically have other responsibilities
  - May not objectively assess the org
  - Likely to leave if they are not selected

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- 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

[www.interim-exec.org](http://www.interim-exec.org)

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