Workshop Handouts

February 2008

Contents:

Risk Level Your Organization May Face if Current Leader Leaves
Practical Self – Assessment*

		Yes	No
1.	Our organization has a strategic plan.		
2.	Our strategic plan includes sections on leadership and/or human capital development.		
3.	Our organization has a written emergency succession plan.		
4.	Our budget designates more than one percent of revenues for board or staff development.		
5.	Our executive has been in his or her position for fewer than seven years.		
6.	Our executive director has said either formally or informally that he/she plans to stay with the organization for four or more years.		
7.	Our executive shares responsibility for fundraising or relationships we need for fundraising with other staff and board members.		
8.	Our board chair has served less than five consecutive years.		
9.	Our board has well-defined term limits.		
10.	Most of our board members have served fewer than six years.		
11.	Our board represents a level of economic, cultural, and/or racial diversity appropriate to our mission and/or found in our community.		
12.	Our board has a committee or designated group responsible for identifying, recruiting, and supporting new board members.		
	Total number of yes and no responses -		

Total number of yes responses __________

Total number of no responses ___________

* Used with permission from Executive Transitions Monograph Series Volume 5
Staying Engaged, Stepping Up – The Annie E. Casey Foundation

Transition Success Factors

Excerpted from an article by Tom Adams as published in Nonprofit World • *Volume 16, Number 3 May/June 1998*

Executive transition is a powerful milestone for an organization and a predictor of its future effectiveness. Careers of departing and arriving executives and reputations of board leaders are directly affected by the outcomes of transition. Whether or not you're currently involved with an executive transition, this article will help you manage one of the most difficult and unavoidable aspects of nonprofit life.

What follows are lessons and practical tips for executives and boards based on a five-year field research project of the Neighborhood Reinvestment Corporation, a national nonprofit based in Washington, D.C. and experienced in applying these lessons in over 200 executive leadership transitions.

Neighborhood Reinvestment has developed a systematic three-phase approach to executive transition that increases the likelihood of success. Here are lessons learned from this project:

1. Take time to clarify how the transition can benefit the organization.

For a host of financial, programmatic and emotional reasons there is enormous pressure to move quickly to place an ad and begin recruiting. No matter how experienced the leadership, this tendency is almost unavoidable. Tom Gilmore, author of *Making a Leadership Change*, describes the rash and unconscious decision-making that occurs during transition as "sleep-walking through the process."[1] The odds of a successful transition are improved when an organization faces this pressure, addresses the legitimate issues that warrant immediate action, and then carefully reflects on how the organization can benefit most from this time of change.

2. Don't skimp on any phase of the transition.

There are three phases to the executive transition process: getting ready, recruiting, and post-hiring. Each phase builds on the preceding one. Skimping on any phase puts the success of the transition at risk. (See the chart below for key considerations and potential obstacles in each phase.)

Be careful that the recruiting phase doesn't absorb the board's attention to the detriment of the pre-hiring and post-hiring phases. If the pre-hiring phase is slighted, you may end up with the wrong person. If the board doesn't reserve energy for the post-hiring phase, they'll get off on the wrong foot with the new executive. Exhausted board members who disappear after selection run the risk of a weak executive-board relationship and too little accountability. Devoting time and energy to all three phases is critical to long-term success.

3. Identify what type of transition it is.

The type of transition influences the costs, risks, and transition strategy, as well as the attributes of the next executive. First, you need to clarify whether the transition is routine or non-routine. Routine transitions occur when an executive retires or takes another position and a stable organization goes through an orderly process of hiring a new executive. Neighborhood Reinvestment's field experience and research, validated by executive search professionals, suggests that most transitions today are non-routine and complex. In Neighborhood Reinvestment's experience, the four most typical transitions today are:

Turnaround transitions. If your organization is in a financial or programmatic crisis, or there is a recognized need to reorganize board or staff, you are facing a turnaround transition. Such a transition requires one or more lead supporters willing to invest in an interim manager, a consultant, and a permanent executive experienced in managing turnarounds. Turnarounds are especially difficult, costly, and high-risk for first-time executives. But even proven executives can be overwhelmed by the challenges of a turnaround unless they have extensive organizational assessment experience.

Organizational startups. When an organization hires an executive for the first time, big shifts occur. The hiring may be part of the organization's formation, or the new exec may be hired after relying on volunteer or part-time "staffing" for months or years. In either case, founders and volunteers must make major adjustments. Letting go and shifting roles can be painful, and reshaping the organization's culture is disruptive. Executives of start-ups also face intense demands. They are often shocked by the number of questions and details handed to them for resolution. Because an organization's beginning has such a great effect on its future, hiring the first exec demands the involvement of people experienced with start-ups.

Underperforming organizations. Many symptoms point to underperformance. Although such thoughts are often unspoken at first, board members and funders begin to wonder if the organization is doing" enough. Sometimes a personable executive is able to raise operating support but provides limited services or products year after year. Underperforming organizations frequently turn out to be in crisis when light is shed on them. Many of the same skills required for a turnaround or start-up are required from the new executive in this situation.

Founder/entrepreneur successions. When a founder leaves, the organization faces major adjustment. Its culture, performance expectations, and relationships are linked to the founder and personality. Even stable organizations can quickly become vulnerable without careful attention to the impact of this change. Similarly, departing executives who built or rebuilt an organization through their entrepreneurial drive, vision, and energy are difficult to follow. Boards often fail to adjust expectations, resulting in rocky starts and short tenures. Rather than rushing to fill the void left by the founder or entrepreneur, it's sometimes better to hire an interim manager. Using short-term leadership can offset the distorted perspectives that are common when such a powerful leader leaves.[2]

4. Assess your organization's health, needs, and resources, and sharpen its mission, vision, and goals.

Search firms refer to this process as scoping—turning a lens to examine and understand the organization's history, current condition, and future needs. When thoughtfully done, this assessment provides a clear picture of what the next exec should be like, what compensation package will attract such a person, and what issues need attention before hiring the new exec. This snapshot also provides a basis for the board to map out its transition route, evaluate the expertise it has available, and identify where outside assistance is needed.

5. Take extra time to recruit a pool of finalists that is diverse in gender and ethnicity.

Many organizations, especially those in multi-ethnic communities, seek to insure that finalists represent the diversity of the communities served. An organization's ability to recruit a diverse pool of finalists is increased if the board and its leadership are diverse. Given the competitiveness for talent and the shortage of experienced executives in some communities, added time and outreach are often needed to identify and attract a diverse pool.

6. Offer a competitive compensation package, including an employer-contributed retirement benefit.

Don't advertise a salary too low to attract people with the needed skills. It's better to remain flexible about salary until you've met potential candidates and know their current salaries and needs. Funders may be willing to supplement salaries with grants to help you hire a more experienced executive.

It's increasingly important to offer benefits, including an employer-contributed retirement plan. A 1993 national benefit survey points to a retirement benefit as more important than salary among Neighborhood Reinvestment affiliates. Organizations that offered an employer-contributed retirement benefit had executive tenures twice as long as those that didn't.

7. Consider outside assistance.

Initially, many board members don't see much difference between hiring a new executive and hiring any new employee. Such a view underestimates the complexity of the process. Involving a person with a proven track record in selecting nonprofit executives is a tremendous advantage.

For larger, more established nonprofits with clear mission niches, search firms that focus on nonprofits (preferably in their mission area) can be particularly helpful. Community-based nonprofits, smaller organizations, and nonprofits with emerging mission areas tend to benefit from working with independent consultants experienced in one or more phases of the transition.

Most boards find outside assistance valuable in assessing their readiness to recruit, in doing candidate outreach and reference checks, and in facilitating the initial relationship-building and performance reviews with the new executive. New executives find enormous benefit in working with an executive coach or management consultant during the stress-filled first year.

Endnotes

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[1] Thomas N. Gilmore, *Making a Leadership Change: How Organizations and Leaders can Handle Leadership Transitions Successfully*. Jossey-Bass Publishers, 1988.

[2] See Interim and Acting Directors: The Case far Short-term Leadership, by Catherine W. Farquhar, *Management and Information Exchange*, July 1983.

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Three Phases of Executive Transition

Executive transitions pass through three distinct phases, each building on the one before. Following are key issues faced by nonprofits during each of these phases.

Key Considerations and Decisions

Phase I: Getting Ready

- Deciding short-term who's in charge of what
- Assessing organization priorities and health
- Hiring interim manager, particularly if not ready to hire or in crisis
- Developing profile of new executive attributes, knowledge, skills
- Setting a competitive compensation strategy
- Saying an appropriate good bye to your departing executive
- Understanding and dealing with departing executive's legacy

Phase II: Recruiting

- Agreeing on a recruitment strategy, including diversity outreach
- Proactively seeking candidates
- Screening and ranking candidates against profile
- Completing thorough reference checks before final interviews or selection
- Spending informal time with finalists and introducing to key stakeholders
- Selecting and negotiating
- Having a back-up plan if first candidate declines
- Completing letter of appointment

Phase III: Post-Hire

- Welcoming and introducing new executive
- Orienting new executive to organization and community
- Making agreements between board and new executive on three- and six-month work plan
- Agreeing on executive evaluation process
- Executive development planning by new executive with board support
- Agreeing on when to revisit strategic plan and direction of organization

Potential Obstacles of Each Phase

Frequent Issues and Obstacles

- Rushing to hire
- Making hasty decisions with out assessing needs
- Becoming frozen and indecisive: too much process
- Employing overly rational process that ignores feelings of loss, anger, etc.
- Underestimating time and help required
- Not asking for help when needed
- Denying real condition of organization
- Recruiting too soon
- Misreading needs of the organization; attempting to hire executive exactly like (or opposite) departing executive
- Hiring an inappropriate interim manager, often someone liked and admired on staff or board but not experienced in what's needed

- Advertising a non-competitive salary, limiting applicant pool
- Expecting a diverse pool with out outreach and networking
- Getting buried in resumes and process with inadequate systems
- Appointing "obvious successor" with insufficient thought or checking
- Doing reference checks too late to influence finalist selection
- Appointing a new executive with board divided on decision
- Not fully disclosing to finalist condition of organization and first year expectations

- Not welcoming or introducing new executive to community
- Succumbing to exhaustion and abandoning new executive during first 30-60 days
- Micromanaging
- Giving insufficient priority to shifting roles and relationship building in first month
- New executive becoming overwhelmed, ignoring board and stakeholder relation ships, staff or administration; having difficulty in balancing all three
- Curtailing surprises for new executive and board
- Paying no attention to work plans or evaluation system

Suggested Steps in Hiring an Executive Director*

Step 1: Determine future needs of agency and develop profile of ideal candidate

- List demands of job – issues facing agency
- Identify assets (knowledge, skills, and abilities) of ideal director
- Agree on salary range
- Complete candidate profile

Step 2: Plan hiring strategy and recruit applicants

- Agree on tasks and schedules
- Make interim arrangements for agency's management
- Agree on process and schedule
- Decide how to involve staff and others
- Advertise

Step 3: Screen applicants

- Receive applications
- Screen applications
- Choose whom to interview

Step 4: Assess candidates

- Plan assessment process
- Design interview
- Conduct interviews

Step 5: Hire director

- Agree on choice
- Negotiate details
- Draft employment agreement

Final Steps: Establish and maintain good relationship

- Set clear expectations
- Plan for formal evaluation process

**Hiring a Director for a Nonprofit Agency: A Step-by-Step Guide*
Popular Government - Summer 2000

Feature Article

The Post-Hire Phase: Launching a Thriving Relationship - A Step-by-Step Approach

By Don Tebbe, Senior Associate, TransitionGuides

Once an executive search is complete there's a natural tendency for the board and staff to breathe a sigh of relief and try to get back to business as usual as quickly as possible. If the search and selection process has been particularly exhausting, the inclination of the board leadership may be to toss the keys to the new executive and say, "we'll see you at the next board meeting." That's probably overstating the case, but based on our interviews with outgoing executives about the orientation process when they were hired, it's probably not overstating it by much.

While the search may be over and the board and staff have been working on the transition for several months, for the incoming executive, the transition is just beginning. The post-hire phase offers a rich opportunity to help the new executive get off on the right foot, to structure relationships in a positive way and to set the stage for achieving the priorities that you identified in the planning stage of the transition.

Using the Executive Transition Management (ETM) approach, the key post-hire tasks include:

- Announce the appointment
- Provide a solid introduction/orientation
- Understand the taking charge process and address the early challenges
- Identify needs and provide support
- Clarify the 12- to 18-month priorities
- Build the board/executive "social contract"
- Define how performance will be monitored

Step 1 -- Announce the Appointment

The appointment announcement can serve multiple purposes. Obviously it's intended to let your stakeholders know the outcome of the executive search and who's in charge now. But, the announcement message can serve as a tool for creating internal alignment by signaling the leadership's commitment to a new direction or by reinforcing a new vision for the organization that may result from transition planning.

The task of organizing the announcement is usually assigned to the transition committee, with help from the staff in fulfilling the announcement plan. The announcement collateral package typically includes:

- A letter to stakeholders (typically, from the board chair)
- A brief bio of the new executive (ideally 1/2 page)
- A press release

With the collateral package completed, the question becomes, who do we send it to? At TransitionGuides, we use the following guide to help our clients segment their stakeholder audiences: (1) those who should receive a phone call, (2) those who should receive a letter and (3) those who can read about it in the newsletter. Your close-in stakeholders (key donors, collaboration partners, etc.) should probably receive a phone call, preferably from the board chair, the chair of the transition committee or other some key leader with whom they have a relationship. Other stakeholders can be informed by a letter from the board chair or an article in the newsletter.

Step 2 -- Provide a Solid Introduction/Orientation

Starting a new job can be a bewildering and stressful process. If you layer on top of that all of the responsibilities that a typical ED shoulders, you have the ingredients for some serious stress levels -- stress levels that may lead to poor decision-making or even adverse health consequences.

A key source of the stress is that simple human distaste for not knowing what's going on, an aversion that seems especially strong among managers. A thoughtful orientation can provide a new executive with key information and help him/her connect with key people early in his/her tenure, both of which will reduce that "what's going on" anxiety level. A good orientation will also help the new executive prioritize his/her learning needs and relationship-building objectives. Where possible, a "briefing book" with key documents and an index of where to find contracts, grant agreements, personnel files, etc. is quite helpful. (If there is an interim executive, assembling the briefing book is often one of their final "handoff" tasks.)

In short, a good orientation can help flatten out the executive's learning curve, which can be steep at the outset. The board and organization have made a significant investment in finding a new executive. Further, you have a lot riding on this new leader's success. Wouldn't you want to make the most of that investment?

There are few absolutes about orientations except that the executive should be strongly encouraged to make personal contact with all board members early in his/her tenure. Early meetings with staff are equally important. The executive should be reaching out to all staff members if the organization is small or, at a minimum, all members of the management team in a larger organization.

Step 3 -- Understand the "Taking Charge" Process and Address the Early Challenges

The process of fully assuming the top leadership role involves several developmental stages that take some time to complete. There is much to be learned, much to be addressed, and many adjustments to be made. An understanding of this process and a recognition that both the board and executive will face early challenges will help keep the early-stage work grounded.

John Gabarro of Harvard studied managers in a variety of settings and identified five distinct phases of the "taking charge" process:

- *Entry or Taking Hold* -- usually encompasses the first three to six months of the new executive's tenure and involves the new director's introduction, orientation, relationship building, early-stage learning and beginning to take the reins of the organization. Organizational changes are typically limited and usually relate to corrective actions and solving problems left over from the transition.
- *Immersion* -- typically lasts an additional four to eleven months in which the executive

begins to manage the organization in a more informed fashion. His/her learning continues, but usually at a less hectic pace and involves a finer-grained exploration. During this phase, executives often plan the actions that will take place in the *Reshaping* phase that comes next, either by revisiting the current strategic plan or instituting a new planning process.

- *Reshaping* -- generally encompasses another three to six months that often involves the implementation of the planning work done during the *Immersion* phase. Typically this phase results in the most significant organizational changes either in quantity and/or importance.
- *Consolidation* -- follow through on the reshaping work and addressing unintended consequences of the *Reshaping* phase.
- *Refinement* -- ongoing. The final phase in the taking charge process at which point the executive is no longer considered new, and the job is no longer new to him/her. The pace of change often slows down and involves mostly the refinement of operations and exploration of new opportunities.

Gabarro's research found that it takes two to three years to move through all five of the phases. At TransitionGuides, we track executives for the first year. We find that by the end of their first complete budget cycle, most executives are deep into the *Reshaping* phase, where they are working with the staff to pursue the objectives in the strategic plan that the executives inherited, or they are working with the board and staff in a new new cycle of planning that they initiated.

Early Challenges -- Both the board and executive face their own set of early challenges. Every executive moving into a new position faces a similar set of challenges no matter the extent of their prior experience as a manager or work in a similar role. The executive's challenges include:

- Gaining an understanding of the organization and acquiring knowledge—quickly.
- Figuring out "who's who" and establishing solid working relationships.
- Setting good priorities.
- Meeting pent-up demands for change and decisions that may have been deferred during the interim period.
- Managing expectations and negotiating competing demands.
- Building a support coalition to back the changes he/she may have identified.
- Balancing both organizational and personal transitions, which can be a challenge to maintaining personal equilibrium and well-being.

Similarly, the board faces its own set of post-hire challenges:

- Shifting gears after the search and finding the energy to address the important relationship-building work.
- Effectively launching and supporting their new executive.
- Adjusting to new executive's leadership style as well as his/her expectations and needs from the board.
- Attending to the trust-building phase.
- Avoiding the dangerous polarities of micromanagement and excessive confidence.
- Avoiding "savior thinking" and dealing with buyer's remorse.
- Ensuring that legacy issues and "thinking ruts" don't derail the work.

It's important that the board's or executive's particular post-hire challenges don't gain magnitude such that they inappropriately derail the new executive's tenure with the organization. An important tool in managing these challenges is communications. The new executive and board chair should be having a frank discussion if these challenges are becoming particularly acute. It's the executive's responsibility to manage his/her own challenges, and it's the board chair's responsibility to ensure that the board's challenges are addressed effectively.

Step 4 -- Identify Needs and Provide Support

In almost all cases the hiring decision ends on a high note with the board enthusiastic about their choice of the new executive director. This is a good thing, but sometimes this exuberance results in a false sense of reality. While the board should certainly extol the virtues of the new executive, it should also be realistic about the places where the new executive might need support. About 60% out people coming into the executive director role have not held that position previously. In all likelihood, there are areas where the new executive director will want or need either support or professional development. We encourage new executives to think critically about their professional development and support needs and proactively seek out training, coaching and other forms of support.

A good tool for incoming executive directors is an entry plan, which typically is a short document (a page or two) developed by the new executive that outlines how he/she will tackle his/her learning needs, the relationship building process with board and staff and how he/she might address the challenges that he/she faces. The entry plan is a good place to make notes about any support needs and professional development plans. Entry planning is really a process of reflection and prioritization. The process of putting it down on paper is often just as important as what's on the paper. The process creates time for that reflective thinking and prioritization that is essential to good leadership -- a time to step out of the fray, reflect on what's been learned, rethink assumptions, and figure out what's next.

Similarly, during the ETM process the board may have identified areas for its own growth and development. They may also have identified some behavioral changes that they would like to make in order to be a more effective partner with the new executive director. The board chair and board development committee chair should ensure that those insights about board performance are translated into a developmental program for the board.

Step 5 -- Clarify the 12- to 18-Month Priorities

As you may have concluded from the discussion under Step 3 above, the first 12 to 18 months in the new executive's tenure is a critical period. There's a "taking charge" process that all executives go through in which they gradually assert more control over the organization. To help bring clarity and focus to the early months we suggest developing a list of no more than six priorities that are crucial to success in the organization during the initial stage of the new executive's tenure.

In our work with clients, we begin this priority-framing process during the Prepare phase of the ETM process. We encourage the board to think of that early list of priorities as a draft that will be further refined when the new executive comes on board. Once the new executive has started, we encourage him/her to discuss this initial list of priorities with board members as a focal point to the relationship-building conversations mentioned earlier in this article. Discussing the priorities with board members provides useful perspective on the priorities and insights into individual board member's sense of commitment to items on the list. These conversations also yield a wealth of related background information about the organization as well as the board and its members.

After the executive director has conducted the board interviews, to refine and hone the list, we suggest that the executive director discuss the board interview results with the board chair and prepare a candidate list of items to discuss with the executive committee. Following the executive committee discussion, this further polished list is presented to the board for discussion, refinement and, ultimately, approval. The board-ratified list then becomes the platform for the social contracting session discussed in the following step.

We typically refer to this list of key priorities as the *leadership agenda* in order to signify that it's not the board's priorities nor is it a "to do" list for the executive director. It's a set of priorities that the board and executive agree are crucial to the success of the organization over the near term -- and that they are committed to achieving together.

Step 6 -- Build the Board/Executive "Social Contract"

Organizations exist in a sea of agreements that frame their interactions. Some of these agreements are written (literal) contracts, but most are unwritten (implicit) agreements. Social contracts are those implicit agreements that guide behavior in social settings in a way that allows us to feel safe and to be effective. One of the most crucial relationships in a nonprofit organization is that relationship or social contract between the board of directors and the executive director. The health and vitality of the organization is often in direct proportion to the health and vitality of the board-executive relationship.

We encourage new executives and the board to have a social contracting session as early in the new executive's tenure as possible -- typically within the first 60 days. The purpose of this session is to ensure that everyone on the leadership team is clear about roles, responsibilities and the board's and executive's respective expectations. A specific conversation about communication between executive and the board and the chair also reduces risk of misunderstandings about the frequency and content of information the executive is providing the board and in what form.

A fundamental tool in clarifying the social contract is up-to-date, clear job descriptions for the board and the executive that articulate their areas of responsibility. The social contracting discussion typically begins with a review of those job descriptions to ensure that everybody on the team is aware of the responsibilities of their job. Building on that fundamental understanding about responsibilities, the discussion then turns to what the board and executive will each contribute toward the achievement of the 12- to 18-month priorities.

The social contracting discussion should also surface the underlying assumptions and expectations, which often aren't articulated without some prompting. It is important to bring these assumptions and expectations out into the open, as they typically are more powerful in shaping behavior than anything that is said in the job descriptions.

Often these expectations and assumptions need to be realigned, particularly in organizations that need to make a big pivot or change to ensure that the organization thrives. For example, the board needs to make a pivot in its behavior in order to support its new executive more effectively, or the board needs to step up its role and involvement in fundraising in order to address one of the priorities on their leadership agenda.

Step 7 -- Define How Performance Will Be Monitored and Evaluated

Now that you have established what should happen (the 12- to 18-month priorities from Step 5) and how it should happen (and clarified the respective roles, responsibilities and expectations from Step 6) the question for Step 7 is: *did it happen?* A good plan to monitor and periodically evaluate performance will answer this question and provide important performance improvement feedback to the board and executive. Accordingly, the concluding step in the ETM process is to develop a plan for monitoring and evaluating performance.

There are two sides to the leadership equation in a nonprofit – the board and the executive. Consequently, the performance monitoring and evaluation process should be seen as a two-way street that reviews the contributions of both the board and the executive. *Performance monitoring* typically involves an ongoing process of keeping tabs on performance relative to your priorities. *Performance evaluation* usually involves a periodic formal assessment process.

During the early stage of the executive's tenure, the priorities on the leadership agenda should be the principal focal point of the performance monitoring and evaluation process. A great way to monitor progress against your 12- to 18-month priorities is to include them on the board meeting agenda. As for the performance evaluations, we recommend to our clients that they conduct an informal, "how's it going" review with the new executive 90 days into his/her tenure, a more formal review at the six-month point and an annual evaluation on the executive's one-year anniversary.

We also encourage the boards we work with to commit to a formal board self-evaluation process to be conducted annually -- timed to roughly coincide with the executive's annual evaluation. The board's performance can have an incredible impact on the executive's effectiveness, particularly in those areas where the board and executive roles touch or overlap -- as often is the case with fundraising. Accordingly, an effective evaluation of the organization's leadership needs to look at both sides of the leadership equation -- the board as well as the executive.

Conclusion

A few simple actions in the post-hire phase can help reduce the steep learning curve that an executive faces, ensure that crucial relationships are built early in his/her tenure, and generally set the stage for a high-impact leadership relationship between the board and executive.