



## **Succession Planning within Domestic Violence and Sexual Assault Organizations, Part 2**

October 3, 2019

### **Closed Captioning Transcript**

>> Hello, and welcome. Before we begin I want to provide you with a brief overview of how our webinar system works and how to interact with today's gender. We have the public chat box. Feel free to questions and comments here. You'll find a PDF copy of today's presentation as well as handouts in the file pod box low. Select the file and click the download file button. A new browser window will open and want you can firm confirm your download will begin. If you experience audio technical technical issues contact Nina chat box. Thank you for your attention and alternative with the letter to the presenters to get started.

>> Hello, everyone and welcome. My name is Monica from futures without violence. We are hosting today's webinar on succession planning with domestic violence and sexual assault organization. Many participants requested part two with more information and a sample succession experience. This is part of an ongoing series supported by the Department of Justice, office of violence against women and parts of supporting organizational sustainability to adjust violent violence. Basically was created in 2010 and offers an interactive tour and a half-day training and ongoing technical assistance for grantees to enhance their organizational infrastructure. At the end of the presentation we will have a question and answer session. Feel free to type questions into the chat box throughout the presentation. We will do our best to answer all questions. We have to presenters today. Janine has experience supporting others with succession planning and as an interim executive director. Marguerite that took part of the succession plan And now is taking place as a peer director and also passed director of the SOS Institute. Jennifer white knight will be moderating the webinar. Janine has worked with a nonprofit organization for the past 25 years. With a focus for the last eight years on capacity building, leadership, and organization development and change management.

>> Margarita is the Executive Director of violence individual program. In New York City that seeks to in domestic and sexual violence to community-based approach. She attended Georgetown University and obtained her law degree from Georgetown University law school. Of the last two decades she has worked with low-income arrogance communities of color and successors to excess justice and social responses and violence.

>> You will be able to as a result of webinar, identify key elements of a departure defined planned leadership succession, utilize tools and resources for succession planning that we have compiled. You can also find them for downloading. Now we will start with a poll question to find out who is in the room. Please let us know your role within your organization. We have executive directors, program staff and some board members. We have a good number of executive directors and program staff. Gray cat thank you. Great, thank you for joining. We would also like to find out how many of your organizations have a succession in. Plan. We are seeing 50-50. Many people that registered and through the registration we learned that at least half of the registrants are going through some succession planning. We hope this webinar is helpful for you. Now we will turn it over to Janine who will start with webinar.

>> Thank you. Hopefully as sound okay. It is great to have everyone here. My name is Janine and I'm excited to be here. I'm going to talk very quickly about what succession planning is and will turn it over to my Margarita to tell her story. One of the things is the concepts that tend to overwhelm people and feel it unattainable and accessible. The tricky thing is it is customized and tailored to your specific organization and culture. There is no formula exactly for succession planning. What we know is that we want the succession plan to support the departing person, and coming person, and the entire staff. Most importantly, we want the plan to support an uplifting mission. One thing I thought was interesting about the second poll question is most boards, technically succession planning is the responsibility of the board. However, there are few board members engaged in this. I have seen boards not involved at all to one member writing a succession plan. One thing we will talk about today are different ways it can look the combination things that are in common with any successful succession plan. What we also know is that is that of two 2008 80% of board members were white and most of those were women. We know in terms of sustainability and stability and HR best practices this is something we have to talk about. Only 27% of Executive Director promotions were promoted from within. Which is a pretty low number. That is another thing we will focus on. That will be part of Marguerite's story. We need to be doing more of that as a sector.

>> Thank you so much. I am so happy to be a part of this. Mainly because I cannot think of anything that would have been more useful here at the violence intervention program prior to the succession then having the opportunity to have learned and been able to use these tools. I offer this story as a learning but the good things that happened and really challenging things I am happy to offer the story to anyone getting ready to navigate what I promise will be an unpredictable process no matter how well you plan. Let me say little bit about the violence intervention program. We are 35-year-old organization. I am the fourth steward of disorganization and have been in my role for 15 months. When I took over dust I'm sorry, our organization has a mission to adjust the mystic and sexual violence online among Latino survivors. They are primarily immigrant and Spanish-speaking. We offer a mix of services including emergency shelter and residential services. We just started piloting sexual violence programs and are proud of

our [Indiscernible] I say that to give a sense of the breadth of the services the organization provides. The whole cohesion around that is certainly part of the succession story. And parted the identity of the organization. We are over 60 members. We have a lot of folks scared across five offices in three boroughs in New York City. Northern Manhattan, Bronx, and eastern Queens. In the photo which I think says a lot about the outgoing Executive Director. The person with the white hair and sunglasses wearing a blue jacket is Sicilia who was our outgoing Executive Director. She had been in her role for 10 years. What is important is when you think about a 35 year history 10 years is obviously a minority of the time. For the sake of giving you a better idea of where we are at when she took over the organization the organization was on the brink of shutdown. She took over a struggling organization. While she was not the founder virtually all of our external partners thought she was the founder because she had help to revive an organization that was otherwise struggling. She was 90 founder but had founder-like qualities. That means something to those of us stepping into big shoes she spent three years of her last three years communicating to the board she was ready to retire and she needed to start creating a process to help the organization to that in a successful way. She took it upon herself to start recruiting for a leader for the organization. Two years before she retired she asked me out to lunch. She let me know that she was looking to retire and looking for a successor. She had done a lot of work to identify who she thought would be a good fit for the organization. That was a higher not have an executive director but deputy executive director. The board was only involved in an informal capacity. I had dinner once with the board chair and vice chair before accepting. Where I got to meet them and it felt a little more social than otherwise. I started as the deputy executive director at VIP in August 2017. It was not until January 2018 that Sicilia's retirement was announced internally within the organization. In preparation for this we had the support of a funder that gave us resources to help us identify an external consultant. Someone like Janine who can come in and be a great resource to us to help us organize what the succession might look like. We did not have the resources internally but there was a funding opportunity we were able to capitalize upon. We are very lucky to have that. The outline that you have attached to the materials as a detailed quarter by quarter blow-by-blow of what it was we had planned in collaboration with that consultant. I think one of the most important things of that plan is it shows you exactly what the organizational priorities were for this change. When you look at that, which has more detail, you will see that time it achieved successfully a balance between external and internal priorities. Very often when we are in the organization all we think about our clients or constituency or the programs. Whatever the outcomes are of your work. Taking about program stability, staff and how they will feel, maybe pick about the board but really internally. This plan helped us to balance it out with the external lens. How will the funders feel? How will we communicate this to partners? And also identified a group of people who would be taking that leadership on. Identified a succession steering committee that would be a committee combination of board and staff who would the folks that would shepherd through this progress in collaboration with the consultant to make sure those identified priorities were in balance.

It outlined a series of sessions to focus on these things. There had been a strategic plan for the organization three years prior to the retirement. We were going to spend time looking at that, updating and identifying future strategic plan Needs. We were going to have a mini retreat to identify board knees. To identify their role in this process. Also to pull in communications and what they would look like. We had an expert so we had the benefit of going on her experience and wisdom. Those sessions laid out the internal structure. What is funding going to look like? What are we going to hope for during this transportation? Expectation? Also identified coaching sections for the incoming directory so that person would have support going in and being able to navigate and hold all of the in the process in a way. Before I go to the next slide I want to say that maybe one and a half of those things actually happened. We did not have a succession steering committee. We never had the strategic planning update or the mini retreat with the board. We did have a lot of work sessions internally and I did get coaching from the consultant but I note that because -- I will references later, all of the best laid plans can somehow manage to go astray. No matter how great the organizational plan Look the moment to moment need will take over. The flexibility you would enter with is going to be critical.

>> In my experience in hanging out with Sicilia I was officially named the incoming executive director at the board's February 20 team meeting. I want to note that it is a year recruiting in six months into me being on board. It was not until that moment that I knew officially I would be the executive director. Then we started our communications campaign. Quickly everything shifted to a big focus on external partners. Communications is one thing we did extraordinarily well on. We were able to do this this is one example of a week image and message. Sicilia welcoming me into the organization. Everything about our transition and communications was a focus on the warm handoff, the way we felt like family, I had worked with Sicilia so long before I started in the official capacity. We wanted to highlight the strength of that relationship. To Janine's point, there is a lot of fostering of leadership of younger women of color coming into these roles. Sicilia was someone who acted as a mentor to me throughout my professional career. We wanted to share that feeling. She brought in someone she had been bringing up in the community. I note that because I thought it was a successful part of the process. I did not sign my offer letter until June 25. Even though they named me the executive director I did not actually have an offer not a formal offer around salary or anything else. Not until June 25 I started formally July 1. Things that we did really well that I want to note. If you are anything like me program and executive directors on this webinar, I do my homework. Everything needs to be researched. I love points and sub points. I love a chart. I love to plot out the work plan and check things off. Really into structure. Collecting it for me was a necessity. I cannot bear the thought lost. The hardest job I've ever had. To collect that wisdom I feel lucky and are grateful to futures without violence and the SOS Institute. It was an opportunity to talk to folks at different points in the spectrum of transition. Different experiences of success to hear from folks that had set a standard and offered up resources. The SOS Institute was a huge help. I spoke to many people who have recently led transitions for outgoing and

incoming. So I would get multiple perspectives. Did that by way of can I bring a copy. I know you're busy. Just cleaning as much from people's experience as I could. Bringing in an outside facilitator was one of the key things. One of the key things that help drive part of the plan that they go as planned. Having somebody to manage the logistics and set up the meetings. Bringing in board members and staff to various meetings. That made a huge amount of difference. Especially because we are understaffed and do not have enough administrative staff to handle that. Having that was important. Having the communications plan was critical. Everything about what we communicated to the world had a lot to do with the work may presence was accept. Having training for the board. There was training for new board members. That was useful. Getting the coaching was huge. Having someone I could reach out to. One of the biggest points of transition as a new executive director, having this experience so much every day there is nobody within the organization for whom often. It is rarely appropriate to ball steamed or vent or be able to talk about something you'd think needed to happen better but you are not sure. "Should have could have would have" and second guesses out loud is hard to do with colleagues looking to you as their new leader. Even if you are able to do that in a transparent magnanimous powerful way, there is something to the freedom of being able to speak to someone externally about that. It gives you an opportunity to be fully authentic in what you are going through. I cannot say enough about how hopeful that coaching was. Staff support. What is amazing in the difference of change and transformation, change your day today is different picture transition been accepted. No matter how excited everyone is for change people really need support your change. Think you have done enough but have not. We also convened and had an identified executive team. One that happened six months after I started and 16 months after that. Another thing we did well was to have overlap. You notice from the time I started to the time Sicilia retired was a 10 month period. 10 months she and I had together. My role in that in that time was Executive Director with a focus on programs. I learned so much about all the details of what the client journey looks like here at VIP starting from beginning to end. I got to know every program and all of the staff. I was visiting every office in that role. I was not yet responsible for the financial management or oversight of the development. I was learning that along the way in small portions but I got the chance to go deep on programs and operations. That overlap was helpful. During that 10 month period I also transitioned to hitting the learning closure of on fundraising and financial management. Program is my comfort zone. In the last few months I have been able to build out some of my learning around financial management. Every single day learn something new I didn't know before. Also around development. Learning to ask for money is something that is not organic for folks coming into executive director roles for the first time. Some things that could have been done better. It was really long. Sicilia cannot keep it going anymore. Our staff at some point were confused where to go? Who's the authority? Who is sending my timesheet? So I feel a little less overlap would have been useful. As much as I felt we had prepared for the transition's health a lot of our preparation focused on the actual transition. Like getting July 21, 2018 then it stopped. After that you do not have a whole lot more to support. Being able to plan for

the first 90 days. This critical first three months in your role in what you are establishing. Because of the overlap that had a different tenor than it might for someone coming in. Having a better plan would have been helpful.

>> Board involvement. We have a supportive living board. They were not very involved in the transition process. The reason the steering committee did not take off as we do not have folks on the board able to dedicate enough time. It ended up being staff predominately me in Sicilia really driving that. I will note that I think it was challenging for the board who had grown attached to Sicilia to let her go even though they embraced me with open arms. Don't underestimate those relationships and connections and how powerful they are. They really wanted to be there for me but it was hard to see Sicilia go. I was never interviewed for the role. The requirements or expectations in my first year were never laid out clearly. Then a note on the support for outgoing activity. I was coming in for someone who was retiring. One thing we could have done a lot better was to think about what was going to happen for our ED after she left. We eventually decide on a severance package very late in the game. It started out with a greater deficit than we planned for the FY and something I needed to address. Sicilia would tell you that all of her extra stress she had been carrying copy to time she was ready to step away from the organization she was sick. She was sick for three months because she finally relieved herself of this burden and everything she had been holding together showed up. I feel like we could have taken better care of her on the way out. We could have had a better plan for her financially and severance factor. We could've figured out her health insurance better. So many things we did not consider because we were focused on the incoming. I wanted to flag that because we need to honor the people carrying the work for us and the stewards of these organizations. We wanted to care for her but we did not plan for that. Happy to offer that light learning year. What made me feel ready for this position?

>> Sometimes I feel like I am still not. That learning that we did at SOS I had the benefit of being able to dissipate in a number of leadership development programs. One called the night Fellowship. New York University Wagner School which is a fellowship for women of color specifically Lee in midcareer. Really helping people in middle management to get that leg up. I also had carried a number of upper management roles before I got here. Before here I was the decide Executive Director for the Bronx family [Indiscernible] office. Before that I was a program director at day one which is a small domestic violence organization in the city working with youth who are survivors of violence. I had opportunities to the skill over time. Again, still not totally there but learning all the time. It was messy. Even though we had a beautiful plan. Like I was saying before, when you are in the moment and you had to put out the fires you do not always get to the strategic planning meeting you intended to have a check-in even while people are ready to embrace the change and are excited, no one is ready. Shepherding the folks in a better way gives some thing for them to think through. Every day I learn the difference between the ego and difference of confidence. Humility is one of the great inks about leadership. When we are feeling defensive and all of those things that is not

confidence that is our ego. Learning to let go of the ego has been huge. Arm in arm and that is relying with your team. Your team will help you get through it all. You have to have good team members. Do not have to take to make sure you have good people around you. That is who will help you get through. The last piece, I know everything. Now I do not know anything. Okay I know a lot but nowhere close to everything and I'm going to be learning until this is over and I am ready to move on to the next transition. That is everything I've got. In Q4 the extra time. I will positive questions. Thank you so much, it is wonderful to hear Tori. We have some time now and anyone want to type in any questions. At the end we will have time for additional questions. A couple of people are typing. We will wait a moment to see.

>> In retrospect what do you wish your consultant had in by you on? Margarita.

>> One of the areas that I think I had the amount of learning on and could have benefited most is engaging my board. You have to have a good team. Not just the folks you are supervising. Those folks are critical but your board is going to make the difference as to what your day looks like. Having had an opportunity to work more with that consultant, which structures would be useful, what I needed to do to familiarize myself with the role versus the board chair. Versus the governance committee chair. That would've been incredibly helpful. To have more advice than having to learn it the hard way.

>> Had a how do you manage a team of staff that are not supportive of the change or your transition to the ED position?

>> The first thing I have to offer and I will ask Janine to chime in if there's anything she would like to contribute. It is so important to have an understanding of why. Why do they not feel supported? Is it an attachment to the outgoing ED? Circumstances? One of the thing we announced internally first so we knew and staff new they were the stakeholder community to him without primarily accountable you. Technically the board knew but as general announcements when we started with the team so they can feel the importance of their presence. Whether that came across to everyone or whether they all walked out of the room to say they were in important team member I cannot say for sure. I know that we planned and practiced in a way that would tell the team they were important. One thing it did you is an anonymous survey to ask them what they were worried about. What values they thought were important to carry through and how they would like to be to communicate to the new executive with concerns. It was purely anonymous. We had a data team take the raw data and put it into an analysis that would not make it so anyone's comment would be [Indiscernible] giving them the opportunity to share exactly how they felt about the process.

>> I will talk a little more about that but I cannot express the importance enough. I will talk more about this but in executive search is part of the succession plan. A way to get that buy-in is a similar thing. You have a survey of staff Ward and stakeholders. What you think the next leader should look like. That means the qualities they should have.

And things like how they move in the community. What their skill sets are. I have worked with organizations where we did that and used those results to inform the process of hiring. That is slightly different how you did but I love that you did it because it allowed you to go in with knowledge about people's fears. That is the hardest thing about change, living in those years. Fears. Having an unsupportive team is difficult. That is more possible and likely when you are an internal candidate. I think it is a sticky complicated conversation that can only be resolved by having these hard conversations, keeping the communication flowing, talking to each other in those types of things.

>> A quick note on my executive coaching can be helpful. I am a lawyer by training. I would like to think I have a social worker's house math but I have a lawyer's mouth. Holding people's feelings is not something I am trained to do or something I necessarily have an instinctual understanding of how to adjust and a professional way. I do care about people and want to know how they are doing and I think having an external coach, who help you identify the difference between your feelings where that goes and where other people's feelings are dominating a behavior. Because this [Indiscernible] I think it is so important. I think it is helpful to have someone who does know those details. To help identify good boundaries. On one hand you do not want to be completely subservient to colleagues but you have to be able to assume the leadership. And you want to be mindful and respectful in ways that are appropriate. An external coach could be useful to you in that context.

>> I'm going to talk a little bit about the components of a strong plan. I want to say that there are so many great resources that has been put together. They are all in files attached to the webinar. On one file there is a list of web links on succession planning. If you like to air on the side of having too much information it is an incredible wealth of information and I uses of a time. I am grateful to Flickr for putting this together. I have learned everything I know from seeing it done the wrong way. I'm going to talk a little bit about what this plan can look like. We're talking about a departure to find plan. Not an emergency plan. I think the weight Margarita illustrated it in the VA because it points to this. I like to think of it as opportunity to really think about and take a step back and think about why you are doing what you doing, how you're doing it. It is a chance to look back and do an organizational assessment. I think it is critical and the thing that I have seen done wrong the most is not having board members take a key role in other staff members that is not leadership involved in the process. To engage people you can engage people at all levels. Even volunteers. Putting together an emergency succession plan Sometimes means putting together lots of documents and you can have a volunteer help. Those are things talk about along the way. I have one organization I am doing a package deal with. I want to share it because it illustrates that succession planning is a combination of looking at your organization, looking at his strategy, it gives you an opportunity to look at mission vision values. It is all interrelated. Onboarding is part of it too. Your process for hiring and onboarding staff are all intertwined. I recommend thinking of it as an opportunity to do soul-searching around your organization. Looking back and reflecting on core values.

>> The other thing is an opportunity to think about sustainability. To look at why you exist in the world. I work with an organization that has been successful here in Durham. Their executive director gave 24 months' notice which is a planned departure. During that time she realized that the best way to sustain itself and the long-term was by merging with another organization. She took one year to find another organization to merge and make the process incredibly seamless and to build a transitional role for herself. They determined what that look like merging with the organization where they were filling a gap in what the other organization was doing. Again, looks different for everyone. The other piece of want to mention quickly as this gives you an opportunity to decide upon how you make decisions and communicate as a staff and board how you communicate together. It is also a good opportunity to make sure not any one person is holding the external relationships. I'm sure some of you have been part of an organization where the executive director or development director pulled all the relationships with donors or pet funders. That is not a good strategy. It is critical for everyone to have those types of relationships. Building the institutional memory. Some of that is having a plan. If you do not know your top five donors building in a time line to make that happen. So there is not one person that knows spoke. That is critical. Want to talk a little bit about a transition team. Believed it was mentioned that I was an interim director. Sometimes it is a good solution particularly when you want to be very intentional. Even if you do have an internal person you are grooming to take deposition from that position. It gives you an opportunity to get feedback from various levels of the community and to design process around what the community sees as most important. Having an interim that is used to feeling in filling in this is to help organizations continue on to be useful particularly if there's been a lot of change or turnover. So a board is not inclined to make a hasty decision so you find a long-term person. So you recruit in places you might not be able to recruit if you're only taking a month to do it. Being really intentional about that is sometimes easy to do when you have a longer transition time. When you know you have six months to figure it out versus one month.

>> Margarita mentioned communication specialist on the board and how that help. That is critical. It is also critical to [Indiscernible] I do not think you should announce someone is leaving until you announce what the plan is. I've seen organizations announce someone is leaving but not what is happening. That is the worst possible thing to do. You need that for donors cost at maneuvers, and the community. Staff members and the community. The next piece is about Margarita's situation was interesting. There are ways to build in a departing executive director and have the support in transition. I think it is important to do that if you can. That is a perfect world situation but may not always be the case. Look at as a time to update your leader's job description. Many executive directors have job descriptions that have been pieced together over the years. They are five or so pages long. This is the time to look at that. Is there an organizational structure that makes more sense for us? Having a six-page job description isn't going to sustain anyone's interest for the long-term. Those are some -- updating expectations and job descriptions are all part of things you can do to help it go more smoothly. And in a perfect world forming a committee is great. For some organizations that may mean their

executive team or governance committee. I would strongly urge anyone who does that to also include two staff members. I do not think this is a one person job perfect it is not. The succession planning process needs to involve multiple people in different levels of the organization and different stakeholders to help drive it. If you look at it as a checklist, which we do have, it can be a very overwhelming checklist. It is nice to have different people working on different components of it. Again, we went over the external and internal, plan and what it might look like.

>> The next slide is about conducting a sustainability audit and organizational assessment. This is a time when you can look at what you are doing effectively to get feedback from the community and gathering input. I love doing anonymous surveys. To really take a step back and say what we're doing as an organization. The other thing I have seen a lot of people do very wrong in the process is to not support the executive director. Margarita spoke to this a lot. Having that board support is very critical. As you notice there are few people identified as board members. In theory it is their role in their responsibility for having this plan in place. We need help to understand that. We have a lot of strategic planning with organizations and it always comes up board members. We need a succession plan but no one is stepping up to say how we do it. That is one of my contracts to help the organization figure out how to do that. Forming a committee like Margarita said. Wearing goals and expectations of the success of the 90 days to one year. I love times what happens is the board may get burned out in the process of hiring a new person. A lot of times we do not use people to do the hiring so we do it internally. By the time they get through an executive hire they are exhorted exhausted and burnout. What I've seen happen is the board will say that person is hired I will disappear. It has been a long few months. [Laughter]

>> I have seen that happen over and over. I've been on a board where I was guilty of doing that. I just want to say, hiring is an exhaustive process. One of the things that stuck out to me besides everything about Margarita was the first thing she said on your first day or first meeting you went to was succession planning. A good steward is taking about what if something happens or if in six months I cannot do this. It is extremely important to note that you may need to be thinking about it throughout.

>> We are short on time but I think you made all the points that need to be made. Thank you.

>> I have no idea someone tell me how we're doing on time. Someone tell me. We have already talked about this. The Board of Directors does have a role in hiring. That is their main function. Decides being the governance body. They are responsible for helping to create infrastructure that will attract a new leader. This gets very complicated but it is something that is not a one person job. It is the job of the body. Also the same token they are responsible for outreach and orientation. I do see that going from a single to co-director model we can talk about that briefly. The departing ED can have a role in senior staff can have a role. My main point here is that open it up. It does not have to be just your leadership team. It can also be folks who have been on staff for 30 years.

Think outside the box about what those natural leaders and organic leaders look like. I worked with an organization where it became clear to me the number one number two person was a great secession for a candidate and the ED did not see her that way. That was a card conversation to have but could because I had an outside view. The particular ED was a martyr. She felt like she did everything for everyone. Margarita INF both tried to fold this into our point. This equity piece, look at your natural leaders, think outside the box. Encourage boards sometimes this can fall apart in transition. So you lose the infrastructure piece. It is great to think about this on the way. No plan is perfect. Most of them do not work but it is much better to have a plan Do not. Anything you wanted to add?

>> I think this is something the board has to double down on. Right we all understand this but to articulate it on the webinar equity is not about getting folks and women of color in positions of authority it is on setting us up for the greatest amount of success. Very often it could have been easy for the board to say great we have nether Latina survivor of domestic violence. But to take into consideration all of the obstacles and challenges I face because of my gender presentation. Because of my brown scaring skin and because I am a survivor in this work. I think about how that will impact my leadership and support me on that instead of looking at it as a liability. I think it is something we are all still trying to figure out.

>> Absolutely.

>> Yes, Stephanie Rowe and about creating a culture for succession planning. I think that is an important point. I think that is sort of what we're trying to do here. To make a clear and to me succession planning having a strategic plan is succession planning. Having an ongoing process. Having updated job descriptions is succession planning's. Those are the types of things people do not think about it is helpful to look at that checklist. A couple of different links were posted but there are a lot of people or succession planning that you have or are doing. What it is is in organizations you want to create a culture of [ Indiscernible ] so does not fall on one person. Not just the ED thinking about fundraising or sustainability. It is similar to that. Tying it all together. Kind of what I talked about in the beginning. Taking a constant look every six months. How are you living out your mission and filling it? How are your values aligned? If equity is one of your values do you have a truly equitable profit hiring or recruitment process for your board? I was at a board meeting this week and the staff of 60%, people of color clients are 80%, people of color the board has two of them and neither were there. We hear about this. It is not something we do not know. There are tons of articles but it just is not and people know they need to do things differently but still are not doing it. Creating equitable hiring processes is all part of succession planning. I hope that is somewhat helpful.

>> This was a learning today. When you are announcing we have shift in an executive team leadership role, I made that announcement on Monday and had an executive team meeting this morning where we were going to go over the plan. In that time, which

is literally 60 hours after the announcement, there was so much that happened for the executive team. What I did not offer is to change happening and here is the plan In the same breath. In my mind I'm offering it on Thursday were fine we have a meeting scheduled to talk then but that is not true for as communication goes I feel like equity and communications are tied hand-in-hand. We are so used to being stonewalled as folks of color in our society. Not being trusted with information or being treated as folks who can't have the information and do something good with it. That will always be present. The transparency of communication lesson learned literally three hours before I walked onto this webinar. The things you do not think necessarily go hand-in-hand like communication and equity, they are all tied in together when it comes to trying to address internally the things the organization navigates externally and internally all the time.

>> Thinking about that it is also helpful to think as a step in the board. With the board application or onboarding for new staff or new board I recommend that people say howdy prefer to be communicated with? Some people are really comfortable receiving important information and some people are not. I think it is important to keep rising to the top. Not only how to communicate but what is important to communicate and how you need to customize it to certain people as a leader. To your point earlier about humility and the importance of saying even if you come in and could have put so-and-so's giving a resignation but we will come up with a plan On Thursday. That is enough so folks know what to expect. I had a program manager who would never create an agenda. It drove everyone working for her crazy. She can never understand it. This is an example have of how knowing each other and trying to get to know each other however you can is critical in times of transition. It can really bubbled things up in times of transition. Not if you don't address it.

>> I am going to move on to -- we are going to go back and look at the chat to talk about questions we may have missed. We would love to open it up if anyone wants to write strategies they use to develop skills of staff as well as potential successors in their organizations. If anyone has great ideas or something that worked well for you. Yes strengths Finder is my favorite. I cannot wait to learn it more.

>> It seems amazing.

>> One of my personal goals to become a drinks Finder coach at some point. The statewide coalition I worked at we used it as a tool. It was amazing how it created a shared language. It was sort of magical. I go back to the all the time. Usually when I start a new contract I tell them or ask if they have done strengths Finder and these are my top five I've come up. I have used it with a leader whom I was not getting along with. When you are telling me a spreadsheet is what I need to do my job best this is why it is not what I need to do my job best. I love the spreadsheet I am a connector it is important to me personally to talk to people and to connect others with other people and opportunities.

>> It is a super important. One of the things I've done with boards...will say hello I get my board more engaged kind is tricky but you can start every board meeting with some examples of what they have done to work towards the mission since the last meeting. I think it is important to do that as staff to. When I facilitate strategic planning and retreats I bring everything back to the mission. I'd also think it is critical to think about your values and revisit organizational values very frequently. Not every month or every other month once a year. Those change as the organizational culture changes in staff changes. I walked into an organization and they said here's organizational values it turned out to people wrote them and they start out with a pre-meeting saying what they wear but no one believed in them. This is how you can tie everything back to the mission and your values. Did I miss anything? There are a couple of questions we can revisit at the end.

>> We mostly talked about all of this stuff. This consideration before hiring a new executive director. That job description thing can be tricky. I can tell you seen this delay a higher. One of the best things to do is to have a updated job description for yourself and everyone in your organization than the salary changes. A lot of times for tickly in this field we have executive directors who are very committed. There are some people who are there for years and years and not making nearly as much money. We underpay women and women of color. That is something to consider. You may know that your executive director and be able to say to your board, look at the salary survey of the nonprofit sector and look where we fall. You will need to expect a \$30,000 increase for the next person. That is a realistic thing to think about and talk about.

>> I just wanted to note that the retiring Executive Director has not given herself a raise in the 10 years she was here. It was definitely a conversation to have with the board when I asked for more. That was the first time in my whole life that I have ever asked for more money than I was offered. So much came out.

>> Is cutting it for bring it up. It is very real. When I was the interim CEO for a bitumen transition to person who left abruptly had been there for 12 years and was making something like 80 and the next person they went to hire after my transition would not take the job for less than 150. That was literally doubling. And they did it somehow. They also had a tan of federal grants and it was something they could do but I just think you have to be realistic about how you are paying folks and what that could look like for a successor. Being clear about the expectations. I would recommend for a chair Executive Director Partnership in my opinion. Everyone on the board. I do not think the chairs should [Indiscernible] that they should do tons of intra-meetings, staff meetings, support. You could go to a staff meeting say if you have any concerns. I am available to talk to. I've seen boards act as the catalyst for those hard conversations. That is okay. Then again, the survey about the key leadership qualities is important. Using that information and incorporating it. I have used it directly in job descriptions and directly in the questions I developed for Executive Director hires. And for the matrix I have developed. It shows how you assess people. Just different things that have come up

along the way. What communities are they representative? Literally scoring people according to that. Marguerite's point about not having everyone ever viewed is interviewed is good point. It is hard to say. You want to think about will your coworkers know in that type of thing. I think it is important to think about how that looks. Not singling you out but interview me anyway. Even though IM moving into this position.

>> A interviews to things not just the organization looking for the right feet the person being 100% sure the organization is a right fit for them. It would have given me a sense of their priorities. I came in blind with respect to the board. My final tips. Cross training staff is an important piece. It also keeps people from burning out. Some of the most successful nonprofits you will notice someone staying there for 20 years but five different roles. I just think that it is important for people to have different experiences and to get to learn different strengths through different roles. That also helps in times of transition. When people get what other people do. The other thing I would say is that succession plan is what people think about when [Indiscernible] they just think about the ED. Sometimes there is a founder still on the board. Sometimes there are key leadership positions. People who have been there for a long time. And sometimes it is the board chair who has a particular style. That has taken on the culture of the organization. Then leaving -- it its does succession planning is about understanding and having a plan Not just for the ED. I do not know if I am saying it clearly. Marguerite is anything you want to add to that?

>> I think that was clear.

>> My lesson learned today about secession planning. Can anyone speak to transitioning from a single due to a co-director model especially when experiencing substantial growth under the current ED.

>> I am on a board that has a shared leadership model. We created it in a forest way we ended up ousting the founder and creating a shared leadership model with three folks from a very different place than she was. She started the organization with five white women who were all very rich. It was started \$10,000 each for three years. Along the way we realized that was not working. We very organically decided to release her from her founder duties and start the shared leadership model. I do not have any of ice on how to do it well. I do note that shared leadership works well. It is incredibly powerful. For executive directors it is a lonely position. Having a partner is incredibly helpful. Particularly because it is hard to find the skill set of everything [ Indiscernible ] they identified what blind spots they had going in. I have seen in our article on this recently. I do not know what else to say other than I love the co-director model but the key to it is having incredible trust and communication between those people.

>> Yes and clear roles.

>> In the resource list there is a link to shared leadership and co-director. Clarified roles who's only where the overlap is in making sure it is intentional. Also being mindful to the board. There is one code leadership model I am aware of from a board members

perspective. Part of the challenge was one person was responsible for all of the development. Which meant stable or may way involved [Indiscernible] they strode around the power dynamic from the board's fundraising perspective it was a firm filter. I was noting the separation of roles in power dynamics.

>> [Indiscernible - static]

>> Any other questions?

>> We had a question in regards to creating a culture for succession planning when it seems that most of the leaving is happening in crisis mode. Being able to plan and get organizations in a place to plan Rather than having to deal with [Indiscernible] sudden departures. That goes to one of the questions that came in in advanced of the training, how do you plan with high turnover?

>> I think high turnover is definitely a thing in our field. What I have found that can be useful is if anyone has a board staff member or volunteer who are very detailed oriented and who really like to do planned checklists, I would recommend starting with them rather than asking them for help when creating your draft plan. I think I spoke to this question, how do you create the culture if by everything you do is being supportive of to include the updated job description?

>> Even if you do not have a perfect document so many resources are being offered and can be tailored to a situation. To create the perfect document for every role but if you had something that is flexible and can tailor to the moment then maybe that is something. Until you have the capacity to do that with every role uniquely. Then you have a flexible infrastructure to respond in the moment. There's something to be said for having something slightly more generic as opposed to waiting to create something specific and it not available when you need it.

>> Don't look perfect be the enemy of good. [Indiscernible - multiple speakers]

>> Margarita mentioned that during her transition several people left the organization and came back after the new transition. That is something that went well during the transition as well. The culture of the organization may be changing in some ways.

>>

>> There was a question that came in around what to do if the funding source doesn't approve of the selection of the new ED? I do not know if that is something you want to address

>> I've seen it in action and the organization chose to change the leader. That is when I came in as the interim. I was acceptable but still he interim so they would not even -- here's the other thing to think about. Funders will not fund people or organizations when they have an interim leader. It is important to think about that in terms of your plan for communication around with the interim leadership might look like. I think that is tricky. I do not think funders should tell organizations who do hire if you are careful in your

selection process and you know you chose the right person you will be able to prove that. I think it is disgusting that a funder would do that but it comes up. If someone has a particular situation they want to talk about I'm sure Margarita would be happy to talk off-line about it.

>> It seems like that question is retrospective. I'm wondering if you would typically incorporate a friend or input fund input or would that not going to the plan? [Indiscernible - multiple speakers]

>> I give that is context because [Indiscernible] but one of the things that we did do that might have invited and tested the waters is we notified funders before. There was a period of time after funders were notified and before the public announcement went out where if there were objections to be made we would have heard it then. I am noting that we didn't have to adjust anything that we had a few weeks that would have given us time to figure out what would happen. A pivot or damage control with the funder or what was going to come back.

>> It seems like we have a minute left. I am not seeing any more questions. I wanted to call everyone's attention to the files attached to the webinar. There are some tools tips to think about and a call to action that lines up three steps you should think about around succession planning. We invite you to take a look at that. We have lots of other resources some of which are listed on the slide for you. They are available to you. I would like to thank our wonderful presenters today. It was wonderful to hear your stories. Please complete the short evaluation. We really do consider your input and it is important to hear what you need and how we can be of assistance to you. Thank you to all who participated. Have a wonderful day. [Event Concluded]