

Leadership Changes: Managing Key Stakeholder Transitions

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2024 NONPROFIT
LEADERSHIP
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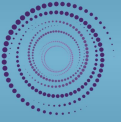
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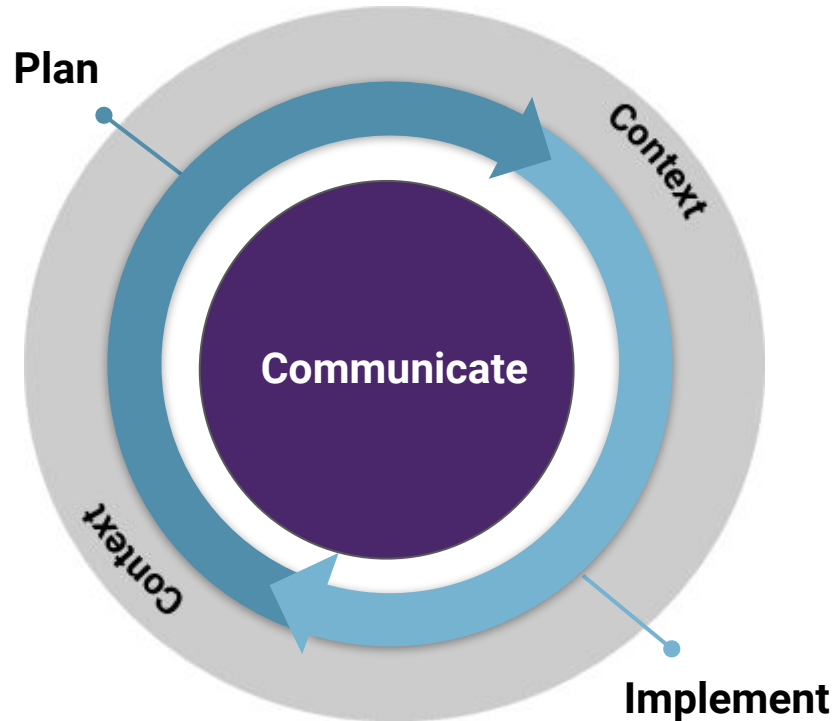
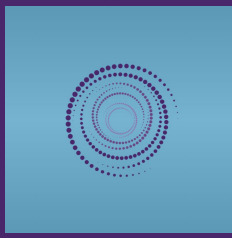
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Session Objectives

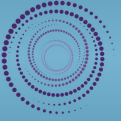


1. Thinking strategically and tactically about leadership transitions
2. Share a framework for managing leadership transitions
3. Consider how to approach transitions with empathy and care

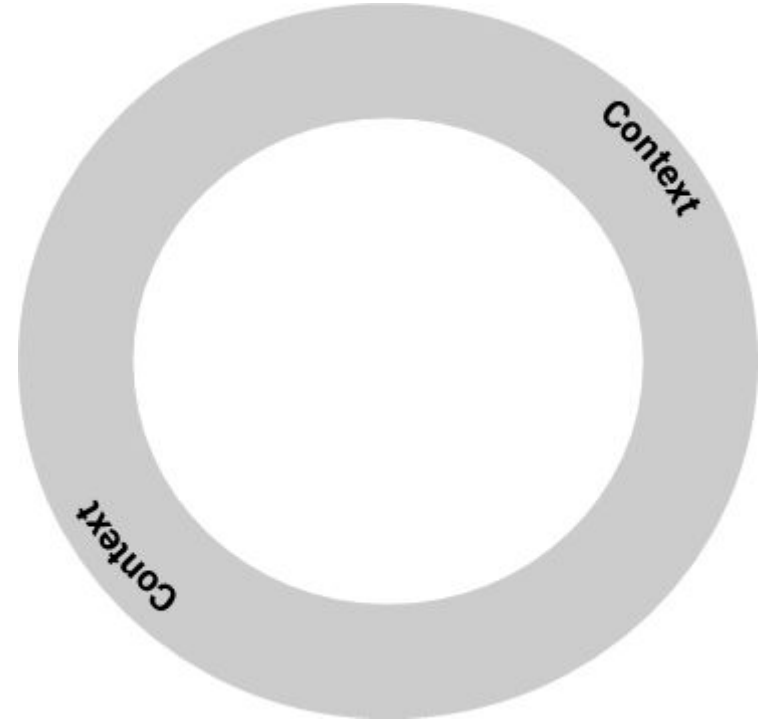
Framework for Managing Change



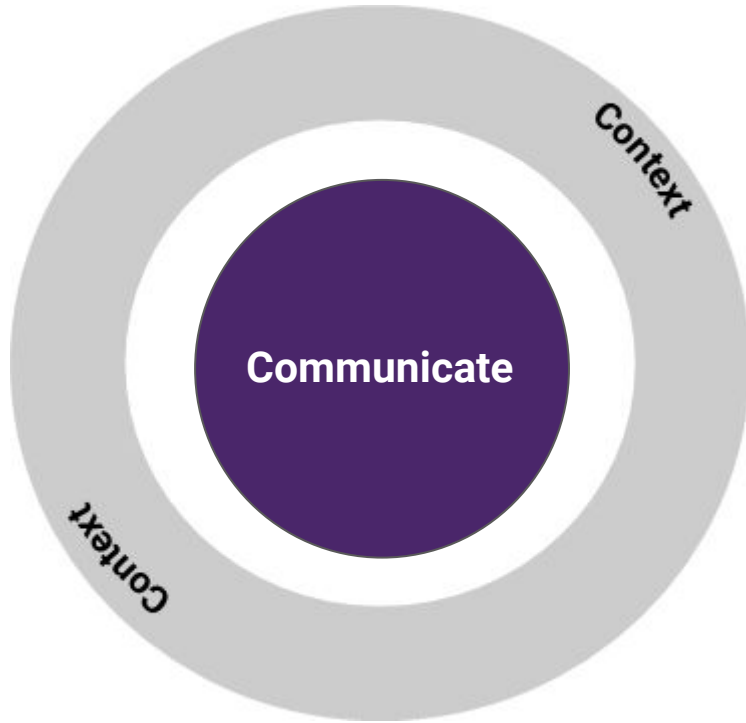
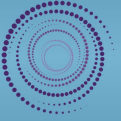
Managing Change: Context is Essential



- Organization size and culture
- Organization operations and models of collaboration
- Board make up and approach
- Timeline of change
- Feelings on change

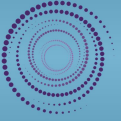


Managing Change: Communication at the Center

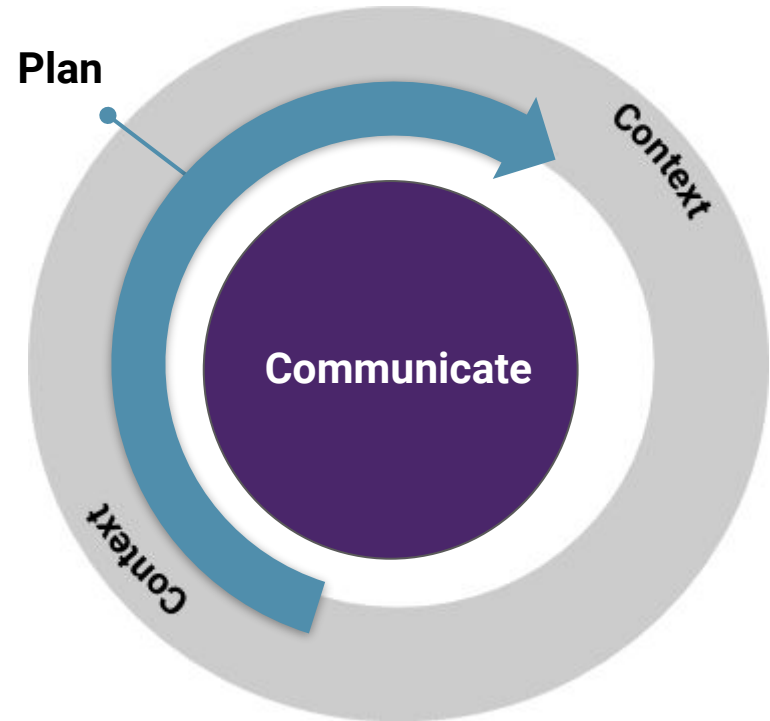


- Transparency as a tool for effective relationship management
- Communicating to maintain buy-in
- Develop a transition communication strategy, considering existing communications strategy
- Consider how, what, when, and who

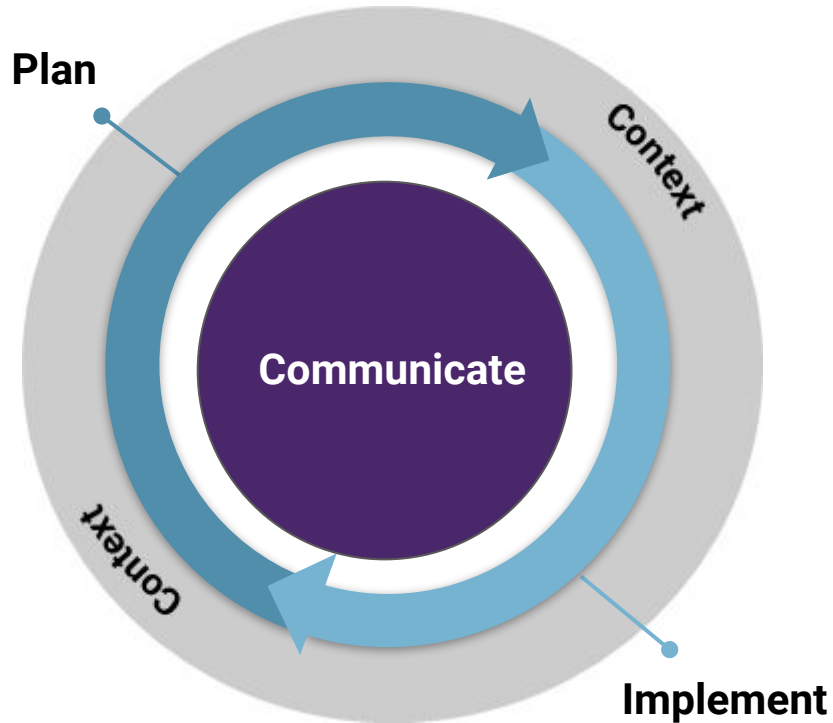
Managing Change: Planning for Success



- Engage with key stakeholders to build shared understanding on goals
- Understand Strengths, Weaknesses, Opportunities, Threats (SWOT)
- Identify and plan to mitigate risks
- Prioritize needs and activities for change & maintaining operations
- Establish an achievable timeline

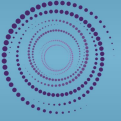


Managing Change: Implementation & Adaptation



- Execute activities and tasks
- Engage stakeholders, assessing evolving feelings about change
- Ensure mission focus remains priority alongside with managing change
- Understand changing limitations and capacities
- Iterate on the timeline and plan

Small Group Discussion: Organizational Context



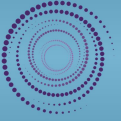
- Organization is based in Minnesota & has youth programming across midwest
- Organization has a 3 person staff and relies on volunteers and partner organizations
- 10 person Board and staff are distributed regionally
- Revenue is ~500k per year
- Primarily individual and events-based fundraising

Small Group Discussion: Change Context



- Executive Director is leaving the organization after 10 years.
- They have provided a six month transition period.
- Executive Director and Board are committed to a smooth transition.
- Stakeholders are generally supportive and understanding of the change

Small Group Discussion: Managing the Change



- Who are your stakeholders?
- What are the risks and priorities?
- How might you balance risks and priorities?
- How might you develop a communication strategy?
- What are timeline considerations?

Small Group Discussion: References for Discussion

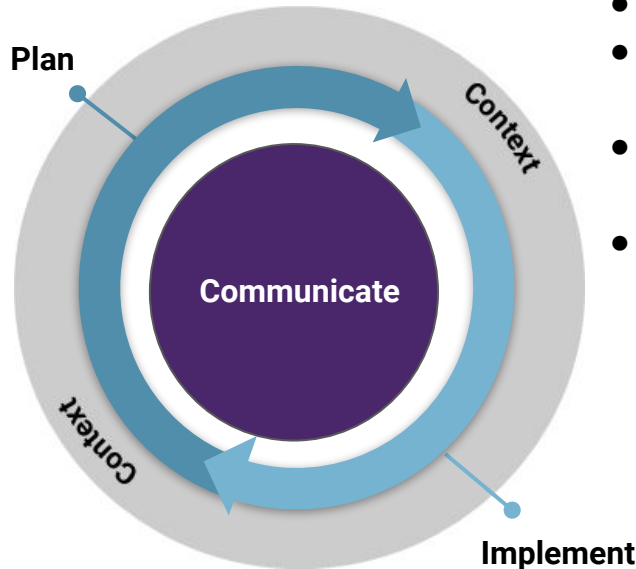


Context

- Organization is based in Minnesota & has youth programming across Midwest
- 3 person staff, relies on volunteers and partner organizations for services
- Primarily individual and events-based fundraising
- Executive Director is leaving after 10 years with six month transition period.

Questions

- Who are your stakeholders?
- What are the risks and priorities?
- How might you balance risks and priorities?
- How might you develop a communication strategy?
- What are timeline considerations?



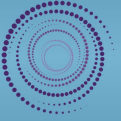
Managing Change Example: CROSO Context



- Organization supports post-secondary educational for former street children in Uganda through scholarship program.
- 10 person board based in US and Uganda
- 2 staff members
 - US-based Executive Director
 - Uganda-based Program Coordinator
- Executive Director started the organization 17 years ago.
- Fundraising primarily individual and small grants
 - extensively based on Executive Director network



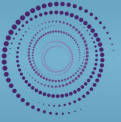
Managing Change Example: CROSO Change



- Founder/Executive Director leaving the organization after 15 years.
- They have provided a nine month transition period.
- Motivations for leaving both personal and a reflection on the organization.
- Executive Director is committed to a smooth transition and ensuring continued support for the mission.
- Board is committed to a smooth transition and addressing some of the challenges the Executive Director has raised.



Managing Change Example: Communication Strategy



- Executive Director shared the intention to leave with Board President
- Board held a 2-session retreat to discuss options and plan way forward
- Honest and transparent discussion on options
- Developed a communication plan based on stakeholder assessment
- Implemented a shared management of communication



Managing Change Example: Planning



Key priorities

1. Pause 2023 scholar applications
2. Identify financial and hiring milestones
3. Recruit and hire new Executive Director
4. Recruit new Board members
5. Annual Fundraising Benefit

Risks

1. Ugandan stakeholder engagement
2. Maintaining Board investment
3. Institutional knowledge transfer
4. Donor relationships
5. Addressing organization operational challenges



Managing Change Example: Implementation Success



- Did market research, leveraging Board member contacts and expertise
- Developed an attractive role and competitive offer
- Recruited and hired on planned timeline
- Had a successful hand-off of staff management and key donors
- Supported a trip for outgoing Executive Director and Board member to visit stakeholders in Uganda
- 1 month co-Executive Director to support transition
- Saw intensive Board time and commitment



Managing Change Example: Implementation Learning



- 1 month transition with the existing Executive Director became closed from other stakeholders
- Not having the Board strongly represented in transition led to a lack of clarity on status and expectations
- Too much ownership too quickly meant the new Executive Director missed opportunities to learn about organizational cultural and community
- Struggles on communication consistency and ownership of tasks
- Recreating some of the unsustainable expectations for work/life



Questions & Answers

Thank you!

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