

## Kids Rethink New Orleans Schools Executive Transition Case Study

Presented by the Greater New Orleans Foundation Organizational Effectiveness Initiative in partnership with Kids Rethink New Orleans Schools

### Introduction

The goal in succession planning is to take advantage of “a significant strategic and exciting opportunity to increase the organization’s service capacity, effectiveness and long term sustainability” (Price 2005). How these transitions occur vary, from emergency departures to strategic leadership development or, with the organization profiled below, in response to a planned departure with advance notice. This case study chronicles the transition process of the founding Executive Director of one nonprofit in the New Orleans community for the purpose of discussion and learning among other nonprofits as they begin to think about and plan for the inevitable succession of their executive.

### Kids Rethink New Orleans Schools

Kids Rethink New Orleans Schools (Rethink) was established in June 2006 to assist middle school students in having a meaningful voice in the city’s school reform efforts in the wake of Hurricane Katrina and the massive restructuring of the city’s public school system. These young people returned to the city after a traumatic year that included, in many cases, losing their houses, leaving their city, friends and often family, and going to new schools in an unfamiliar community.

Rethink’s mission is to support low-income students, particularly youth of color, as they: (1) become thoughtful, capable leaders for today as well as tomorrow; (2) ‘rethink’ the public school experience and push for school-specific as well as system-wide change, and (3) build a new generation of leaders who practice ‘power among’ their peers rather than ‘power over’ them.

The organization operates two major programs: school-based clubs, in six public elementary schools, and a citywide program comprised of an intensive summer school, a national speakers’ bureau, and five action committees: School Food Justice; Restorative Justice; Architecture; the Rethink Garden; and Digital Media. Rethink focuses on middle school youth but includes students ages 8-18.

In the culture of Rethink, youth are considered part of an intergenerational family in which all voices are heard and respected. The youth decide what issues they will ‘rethink’ in a given year, lead news conferences to present their recommendations for change and determine actions that will turn recommendations into school policy.

The organization’s culture of acceptance and respect traces its roots to Native American and African meeting protocols and customs, including their use of a circle as the structure for communication and

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decision making. Such circles where power is equalized and communication is non-judgmental have been used for centuries to conduct community business and to make important decisions. Rethink conducts most youth and adult meetings according to circle principles and maintains an Elder Circle that serves as a group of advisers and supporters of the organization.

While the founding Executive Director has clearly been the driving force of the organization, its culture is collaborative. The board, in the words of the Founder/Director, has operated in many ways as a support group, and she credits them with pushing the organization to develop personnel policies and sound financial practices. While they have provided basic financial oversight and fundraising assistance, they have taken their cues from the Founder/Director rather than establishing and enacting their own agenda through committee work and board-driven projects. Staff, organizational partners, board members and members of the Elder Circle see Rethink's culture emanating from the director's personal vision and style. Her description of her leadership approach was "lead by my own example of warmth, hard work and willingness to do whatever it takes for the Rethinkers to thrive."

### Rethink's Transition Process

The succession of an Executive Director is an organizational milestone for any nonprofit and there are specific challenges when new leadership is taking over the reins from the Founder. Rethink's founding Executive Director's persona is inextricably woven into the culture and reputation of the organization with her charisma, vision and tireless work on behalf of the organization and its mission.

There are specific stages to each Executive Director Transition process and Rethink's occurred in four phases.

#### *Phase One: Time to go; Getting one's duck in a row*

In 2010 the Founder/Executive Director and Board Chair had preliminary discussions about the director's eventual retirement in 2012. They talked about the qualities necessary for the next Rethink director and who might be appropriate for the role. In the spring of 2011 the board and staff wrote a five year strategic plan which included the goal and strategies for "creating a leadership pipeline and succession plan for the Founder and key staff." Four months later the Executive Director announced to her Board and staff she planned to retire by June 2012. Once her intention to leave was articulated, she returned her attention to identifying individuals who would successfully lead the organization into its next stage. She began to engage Rethink's stakeholders and others in her professional network to help identify a

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possible successor. She knew that as Rethink moved forward a different combination of leadership traits and new skills would be necessary for the organization to maintain its culture and impact.

A young attorney who volunteered with Rethink's summer program in 2009 found her involvement with the organization a welcome and inspiring alternative for engagement in social justice than that afforded by her responsibilities with the law. The following year she joined the Board of Directors and in 2011 she was named Board chair. As the chair she worked closely with the Founder/Executive Director who recognized in her an individual who would be a perfect candidate as Rethink's new leader. After many candid conversations they concluded that it was an ideal fit and the Executive Director began to build support for the idea among her staff and board. Meeting first with staff who were familiar with this person's work as a program volunteer and board member, they concurred that she was a good match for the organization. The Founder/Executive Director then presented the idea to each Board member individually and six months after her retirement announcement, the Board unanimously supported the hiring of the candidate. She joined the organization as an Associate Director for a six month period beginning in January 2012 and prepared to assume the helm of the organization in June 2012.

In the words of the Founder/Executive Director, "We just knew that she was right. She adored children and respected them; she was intrigued by our circle culture and had worked her way up the Rethink ladder. Equally important, she was hard working, smart, and very sociable. She had no experience being an E.D., but neither did I." With her successor identified and the core stakeholders of Rethink supporting the decision, they entered the second phase of the transition process.

### *Phase Two: Going public; Shadowing and transferring knowledge*

As this transition process was unfolding, the Founder/Executive Director approached the W.K. Kellogg Foundation to support the costs of an 'intentional' transition period to allow for an overlap between the current and new Executive Director's tenures. The Foundation agreed to pay six months of the incoming Executive's salary and provide funding for one year of the Founder's time in a consultant role. In November of 2011, while awaiting Kellogg's decision, the Executive Director wrote Thanksgiving letters to Rethink's funders thanking them for support, and announcing the leadership transition. a

The Founder/Executive Director also approached the Greater New Orleans Foundation Organizational Effectiveness Initiative to consider documenting the transition process and a small design team was

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created to develop a case study, and plan a learning forum to share Rethink's experience as well as other promising practices from the nonprofit field.

During this phase of the transition:

- The Associate Director shared a desk with the Founder/ Executive Director and shadowed her as they met with funders, service partners and supporters of the organization.
- The Founder/Executive Director copied the Associate Director on all correspondence.
- A phased plan of communication was created to let stakeholders know of the Founder/Executive Director's planned departure date and the assumption of Executive Director's role by the Associate Director on June 1, 2012
- With input from staff, they began to inventory the tasks and responsibilities of the Executive Director. They also identified resources within and external to the organization the Associate Director could access to help her fulfill her responsibilities.
- The Associate Director gradually began to assume tasks on her own: planning the annual student summer session, supervising staff, conducting performance evaluations and working with the Board.
- With input from the staff and board, began to identify organizational policies and procedures which need to be formally codified.

While initially anticipating a formal series of training sessions for the incoming leader, the press of attending to all the work of the organization altered the approach taken to get the Associate Director completely up to speed. In the end, said the Founder, "The process was hands-on and experiential-ore like throwing the Associate Director into the water with a rope attached to me and asking her to swim as best she could."

The Executive and Associate Directors began individual journals to chronicle their experiences of the transition process and provide a structure for self reflection and learning. They shared their journals with one another periodically to compare notes and jumpstart dialogue.

The Elder Circle met in April 2012 and devoted a significant amount of time to discussing the transition, emphasizing the importance of rituals to mark the shift in leadership. At the Rethinkers' retreat, later in the year, a circle discussion on the subject of change was convened using the transition as an example.

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Both events served as a forum to acknowledge the founding Executive Director's importance to the participants gathered both personally and professionally. In a symbolic ceremony Elder Circle members selected individual glass beads from a bowl of diverse, brightly colored beads which they felt represented significant aspects of the Founder's personality and strung them along a cord; the Rethinkers continued this ritual adding additional beads at their retreat. The beads were later made into a necklace and presented to the Founder as a farewell present. In the words of an Elder, "it gives us a chance to think about our fears of what may be lost and our hopes for the next era."

While most of the staff's transition discussions centered on the logistical elements of the succession, they too have been vocal about the emotional impacts of this shift in leadership. The Founder has served as not only an organizational leader for Rethink staff, but as a mother figure for many of them and brought an "intergenerational element to the circle which we will miss and cannot replace".

### *Phase Three: The hand-off and planned consultancy*

The organization's primary focus during this phase has been on the upcoming 2012 summer session and ensuring everything is in order for a smooth transfer of leadership. As the time gets closer for the new director to assume her role, both women and the board began to identify the scope of consulting work for the departing executive agreeing that the founder will report to the executive directors once in this new role. incoming director acknowledged at one point, "I don't know what I need at this point, but I will have a better sense once I am in my new role."

In a May 2012 meeting, a committee of the board met with the incoming and outgoing directors to have conversations about what would be expected and required of them, including the board. They acknowledged the board's past practice of deferring to the founder and shared their intent to stand strongly behind the new Executive Director as she assumes the leadership role in the organization. The board developed a work plan with the new Executive Director which articulates one year goals, benchmarks and professional development needs and agreed to refer to the work plan throughout the upcoming year.

### *Phase Four: The transfer of leadership*

June 1, 2012 Thena Robinson-Mock became the second Executive Director of Kids Rethink New Orleans Schools. Jane Wholey, the Founder and first ED, stepped down from her position and is now serving an s

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a “behind the scenes” consultant to the incoming director. The leadership of the board is now shared by two board members, co-chairs Hamilton Simons-Jones and Deirdre Burrell-Johnson.

Summer activities are underway and plans are in place for the upcoming school year.

### Reflection

While occurring in more of an iterative rather than linear process, Rethink’s executive succession provided its leadership, board and staff an opportunity “to look at the big picture and think through what makes Rethink work and how to keep that alive while changing,” according to its board co-chair. As part of its evolution from an oral culture to a written one, the transition process prompted the organization to, as one staff member remarked, “create formal structures but not kill what makes Rethink Rethink.” The transition process also highlighted the organization’s need for ongoing board development, ensuring that the one year work plan for the ED is carried out successfully, and completion of an annual evaluation of the Executive Director.

Rethink’s experience is an example of how to address the challenges inherent in all executive transitions: how to develop a process for leadership succession which honors an organization’s unique culture, find the right new leader for the unique time in an organization’s development and allow for a healthy closure with the departing executive and successful supports for the incoming leader.

While every organization’s leadership transition is unique, Kids Rethink New Orleans Schools’ succession process can serve as a thoughtful and successful transition model for other nonprofits engaging in this very important work.