

Non-Profit Board Transitions

The Situation:

A non-profit board was in the midst of a number of transitions in terms of both membership and tenure. The Executive Director was looking for help in bringing the new team together, while effectively and efficiently navigating the transition underway based upon the changing of the guard.

The Opportunity:

Develop the agenda for and facilitate the board retreat that had to balance the need to get work accomplished while simultaneously begin forming the new board members team. The outgoing board members needed to be acknowledged for their many contributions while passing on their knowledge and inspiring the new members. The board also had to get into action and identify the three major initiatives for the upcoming year while the executive director had to take more responsibility for the results now that she was fully in charge.

The Story:

George worked with the Executive Director, Program Director and President of the Board to define what success would look like and determine the most efficient and effective way to help them get there.

- Step 1 – identify the critical business objectives and design an interactive retreat that focused on bringing out the diversity of the board to enhance their work output.
- Step 2 – facilitate the retreat that allowed for time and space for the board members to get to know each other and what drew them to the organization.
- Step 3 – ensure that the business got done in an efficient and effective way while forcing everyone to contribute in a meaningful way so that the team achieved immediate success.
- Step 4 – coached the Executive Director to identify concrete next steps and by whens so that action occurred and momentum was not lost.

The Results:

The meeting was a success according to all the participants, both new and old. The Executive Director and her team knew exactly what they were tasked with and more importantly knew they had the board's commitment to support them get the work done to get the results they wanted.