

## Transitioning into the ED Role: Four Keys to Success

### How does one move successfully into a leadership role at a nonprofit organization?

We explored this question in an interview with Judy Vredenburg, the President and CEO of Big Brothers Big Sisters of America.

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"What's been great for me on a personal level is that I've been able to be truer to who I really am," reflected Judy Vredenburg in thinking about the benefits of making the transition from the for-profit to the nonprofit sector. "I have a good ability to empathize, but in my for-profit world I didn't use that ability very much. In hindsight, maybe I should have or could have. It has been liberating to be able to be more empathetic." Nevertheless, there were challenges and frustrations in transitioning into this new role, and in transitioning into the nonprofit sector in general. As Judy points out, however, one can take specific actions to enhance the quality of this transition.

Beyond the basic foundation of strategic problem-solving skills, Vredenburg learned through her experiences four key elements to succeeding as a new manager and leader in a nonprofit organization:

1. Develop a good working relationship with the Board of Directors;
2. Create a clear, common understanding of goals, roles, and responsibilities—the "who does what and why"—among Board members, senior-level managers and direct reports;
3. Establish a trusting and loyal team within the first 3-6 months on the job;
4. Identify a "translator"—a trusted confidante with an independent outlook, an understanding of the organization and its culture and an ability to deliver the tough messages, who can serve as an interpreter of sorts or a sounding board as needed

### 1) Develop a good working relationship with the Board of Directors:

"I can't stress enough the importance of developing a good relationship with the board as quickly as possible," Vredenburg said of this first point. "And by that I mean developing different, strong relationships with several members of the Board."

It's critical for the board get to know the top managers of the organization, she says. When an organization's leader and its Board members truly understand one another's perspective on strategy, implementation, and preferred style of working, sustainable progress becomes possible. That's why the Executive Director, and anyone else in a position that relies on the Board's influence should invest the

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time to seek out and connect with board members—not just as a group, but also as individuals—very early on in their tenure. "I was able to develop strong relationships with four or five key people on the Board very quickly," Vredenburgh said. "Those relationships have served me enormously—both early on and over the long term."

To illustrate the importance of strong Board relationships, Vredenburgh pointed to a situation in which the buy-in of the Board proved critical. "We brought in a high-level manager from a corporation to run one of our local agencies," she told us, "and due to a variety of factors, we didn't give the local Board any influence in the selection process. I hired her, and I communicated to the Board that this is the person that they are going to have. I'm sure you can imagine that bringing her in that way didn't endear her to the local Board. But she was brilliant in how she managed the transition. She invested the time to get to know the Board members; and she invested the time for them to get to know her. And now they love her, and their agency is meeting with success."

Strong relationships with Board members are critical when a CEO must make difficult decisions that require the Board's backing. There are many tough decisions leaders must make and, in general, leaders must be thoughtful about building up their capital and trust with their Boards, and courageous enough to use it in places that may be unpopular but well worth the return. Vredenburgh noted this is especially true in cases where a leader needs to replace a staff member who is popular. Reflecting on one particularly difficult decision, she recalled, "I couldn't have done it if my Board hadn't been 100% behind me. In fact, I used up a lot of capital with the Board in making that decision. But I'd build it up in the first place, and it was capital well spent. The Board trusted me to do what I needed to do."

## **2) Create a clear, common understanding of goals, expectations, roles, and responsibilities—the "who does what and why"—among Board members, other senior level managers and direct reports:**

Clarifying roles and responsibilities from the outset will set the stage for change and progress in the organization. In Vredenburgh's case, in both of her nonprofit management positions (as a senior vice president with the March of Dimes Birth Defects Foundation and as the President and CEO of BBBSA), she has been expected to use her new role to implement a certain amount of change or accelerated progress. This is easier said than done, both for the leader who introduces change and for those within the organization who are asked to share this new vision. Vredenburgh commented, "Often, an organization thinks they want something, but 'the body' rejects it."

A leader arriving at a new organization must make sure that he/she understands the critical questions surrounding his/her arrival and this "call for change." Who is calling for change? Are the key players ready for action? Is the organization ready for a newcomer to make noise? In addition to carefully assessing the organization's readiness for change, managers from the for-profit arena may need to invest time to clarify expectations regarding the process and timing for decision-making. "Nonprofit organizations are by-and-large accustomed to a decision-making process that revolves around building consensus among many different parties, which can be much more time-consuming than directive decision making." Managers who come in from the for-profit arena are generally not accustomed to that approach, Vredenburg said, and they're mystified when their straightforward, goal-oriented actions are interpreted as overly aggressive or forward. Vredenburg herself had to drastically readjust from a more "command and control" leadership style, to a more collaborative and "shared" leadership approach.

Vredenburg drew special attention to the respective roles and responsibilities of a nonprofit ED and his or her Board of Directors. Given the division of power and distribution of duties under the prior ED, a Board of Directors may be accustomed to a certain set of procedures. Furthermore, even if the general understanding is that the new Executive Director (ED) is going to be responsible for a specific task, the Board's behavior may be so ingrained that they proceed to do things "the old way". In a similar scenario, other top managers within the organization, also accustomed to doing things a certain way, may inadvertently or intentionally bypass the new ED during key decisions, especially if they are uncomfortable or unclear on the new protocols and processes.

Vredenburg stressed the importance of ensuring that the Board members, the top management team, and any direct reports, including regional and local organizational leaders, understand the new expectations regarding authority and responsibility. New leaders need to be as explicit and specific as they can when they are setting goals, assignments, timetables, and reporting schedules, she said. Anything vague is subject to misinterpretation, and anything subject to misinterpretation will be done, by rote, the "old way."

### **3) Establish a trusting and loyal team within the first 3-6 months on the job:**

This insight pays heed to some of the harshest realities of accepting a top post, whether or not the new leader rose through the ranks internally, or has joined the organization from the outside. For every new leader, there is sure to be at least one person who feels they've been passed over for the job. In addition, there may be a few people who take issue with the new leader's background or qualifications for the job. And finally, there may be even more individuals who are at odds with the new leader's proposed strategy or action plan.

These are a few of the inherent downsides of accepting any top position, Vredenburg points out. Yet, in a nonprofit, where consensus building is critical, even one person on the top management team with adverse influence on the rest of the management team, the staff, or the Board can cause a new leader to stumble. This does not mean that staff members who are initially resistant to a new leader's ideas will never become valuable participants in the organization's new direction. On the contrary, Vredenburg found that once resistant staff members became convinced of the quality of the intended strategy, they became important and strong supporters, bringing a purity of purpose in their drive to accomplish the strategy. Vredenburg found this transformation inspirational, and certainly different than anything she had ever experienced in the for-profit sector. However, a leader must be able to distinguish between those who will eventually be receptive to change and progress, and those who will only serve as roadblocks. Those who appear to be permanent roadblocks may need to leave the organization in order to guarantee the health and progress of the team and the organization.

Establishing a trusted team is also critical in allowing a new leader to determine whether the staff and other senior managers are capable of implementing any new intended strategy for the organization. Vredenburg stressed the importance of assessing people based on what you want to do with the organization—not on what staff members have done in the past with the organization. It is essential to assemble the skills that will be important going forward, which in some cases may be very different from the ones previously housed within the organization.

#### **4) Identify a "translator"—a trusted confidante with an independent outlook, an understanding of the organization and its culture and an ability to deliver the tough messages, who can serve as an interpreter of sorts or a sounding board as needed:**

As Vredenburg reflected on the key factors of her success, she expounded upon the value of one special "trusted confidante," who has been by her side throughout her tenure. That trusted confidante has been Joe Connolly, who was the chair of the search committee that originally tapped her as CEO of Big Brothers Big Sisters, and has continued on to be her current Board chair. "He really acted as my coach, and helped me transition successfully," she said. "In part it was his thorough understanding of the way the organization operated; in part, it was also his deep understanding of its culture." Vredenburg underscored the importance of Connolly's ability to be a barometer for what the organization could handle, surfacing issues people wouldn't approach Judy about. "I couldn't have been more fortunate," she said. "But I would also have to say that the key was not his position as Board Chair, but rather his personality and knowledge. What mattered was that he understood the organization, that he understood me, and I felt I could trust him to be my sounding board."

Vredenburg invested a substantial amount of time and resources in developing this relationship and in accessing his advice and wisdom at key junctures. She recalls, "I remember, in fact, when I was going to give my first keynote address [for Big Brothers Big Sisters]. I brought him into Philadelphia before the event, to be my sounding board. It was a great help to have his perspective going in." Vredenburg notes that in some cases, new managers don't necessarily have the skills, or the knowledge of the need, to seek out such a mentor on their own. To the extent that it's possible, she told us, the search committee should ensure that there is such a person willing to take on the task. Ultimately, the manager in question will identify his or her own trusted confidante. But any support that can be given early on to facilitate the transition period will not be wasted.

"New leaders from the for-profit world can be successful change agents—but only if they work with people within the organization who are willing to engage in the new direction."

Through these four key strategies threads a common theme for new leaders—the importance of building meaningful relationships and understanding with those at all levels within the new organization—from staff to Board members. Does following these four key strategies guarantee a bump-free ride? Certainly not, but following in Judy's footsteps may bring something even more fulfilling, as Judy simply stated: "the job that I was always meant to have."

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