

The Retirement **BOMB**

How does the land trust community replace its best leaders?

PERHAPS YOUR EXECUTIVE DIRECTOR has steered the land trust through thick and thin for decades. Perhaps one of your board members has accumulated years of institutional memory as well as the respect and recognition of the community. Perhaps your development director, having cultivated loyal donors for years, has become the face of the land trust's good work in their eyes. Now imagine: your leader mentions retirement!

Not a comfortable discussion for most land trusts—but one we face more and more as the baby boomers “age out.” Our land trust community is at a unique point in its growth curve. The movement blossomed only a few decades ago; since that time land trusts have grown and matured as effective leaders in their communities. Now many of their individual leaders have themselves matured and are anticipating retirement. A massive “changing of the guard” is underway.

In response, land trusts need to think about how to best enable succession in leadership. Good strategies addressing “the retirement bomb” follow, and advance planning is the key.

When Retirement Looms

When our best leaders near retirement, a first step is recognizing that the topic of leadership succession needs to be addressed, and the earlier the better. “We ought to plan—but boards tend to not want to think about it,” observes Jim Morris of Solid Ground Consulting Group, “and human dynamics make it difficult to get to the topic.”

Many factors can delay the planning process, including, for example:

- * **Founder’s syndrome:** A long-time organizational leader often is accompanied by long-time followers. These roles are hard to change, and it can be difficult for habituated members of the board and staff to adjust as the leader moves toward retirement.

- * **Worry factor:** Leaders may perceive a risk of being forced into early departure if they discuss retirement plans with boards that are over-eager to put the transition behind them.

- * **“Silo” mentality:** Task-oriented committees and work plans can advance organizational efficiency, but sometimes can hinder cross-communication and distract focus from overarching concerns, such as changing leadership needs.

Morris, who consults with environmental organizations on leadership development and succession planning, outlines a three-step process for groups that have identified the need for leadership transition.

1. Work with the leader to define the position’s “success profile,” that is, what the job ideally should be. Transition can be an opportunity to re-examine leadership roles and responsibilities.

2. Assess potential successors, internal and external. Identify gaps in their skills and experience so that candidates may be

strengthened through tailored training, job rotation, mentoring and the like.

3. Create a written succession plan. The plan defines terms and lays out specific actions: What are the key relationships of the leader—such as with landowners, foundations, partners, others—and how will they be managed during transition? What is the role of board members in the process? Of staff? A succession plan can be a blueprint that guides board and/or staff actions through a complex transition period.

Early Strategies

How can land trusts remain stable and resilient during leadership transitions? How do they recruit and prepare new leaders? As land trusts gain experience defusing the retirement bomb, several strategies are emerging, not just to prepare for the transition time, but to prepare the organization as a whole, long before changes occur.

Cultivate board and staff leadership talent. * “Leadership growth starts at the moment of hire, with each and every new staff and board member,” explains Heather Richards, director of land conservation at the Piedmont Environmental Council in Virginia. By encouraging each person to learn and grow his or her talents in the organization, a land trust creates a stimulating work environment and enhances individual leadership capability at every level. Supervisors can encourage leadership and professional growth by creating decision-making teams that include junior staff members and by identifying in-house opportunities for staff to acquire new responsibilities. Webinars, peer group learning and other training opportunities can add skills.

“Build time for staff to learn, not just perform tasks, when you are work planning and creating your annual budgets,” advises Judy Anderson, a consultant to land trusts and a facilitator/expert on the Land Trust Alliance’s Learning Center. “Make it an expectation.”

Strengthen the board. * Sound succession planning necessarily starts with the board. When facing an imminent leadership transition, it may be helpful to modify the board composition to add certain skills, as Scott Dickerson, executive director of Coastal Mountains Land Trust in Maine, explains in his transition story (p. 16). In the longer term, Anderson says,

“we need board members that seek shared leadership and can work well as a team—and expect their staff to do the same. Nonprofit leadership is transitioning more towards ‘conductors of an orchestra’ where we are fostering input and learning, long-term thinking and attention to how we relate to people within the organization and the community.” A board that encourages participation and learning at all levels of the organization thereby supports the development of leadership talents wherever they reside in board or staff—and this strengthens the organization for successful leadership transitions.

Build continuity. * Unrushed transitions are more likely to be smooth and transfer the full roster of leadership responsibilities without any “dropped balls.” Morris advises that a two- to five-year lead time works far better than six months or less. Another advantage to a long lead time is that it allows a land trust to seek just the right person. Incorporating succession planning right into routine strategic planning can also enhance continuity; leadership cultivation and succession planning become an integrated organizational activity rather than an afterthought.

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Consider alternative leadership structures. * By sharing leadership responsibilities among three managing directors, Montana Land Reliance is less dependent on any one individual’s leadership (see case study at right). This can allow greater stability and resiliency when a director leaves.

Take the community perspective. * Many land trusts remark that even while the baby boomers prepare to retire after decades with their organizations, younger staff are job hopping among environmental organizations. Thus, some organizations are reluctant to invest in leadership and other training for these junior staffers. However, “we need to view leadership as a community problem in need of community solutions,” says Richards. Dickerson agrees: “Part of an effective executive director’s role is to mentor staff for advancing into leadership roles. Whether they end up working there or moving to another organization, this will strengthen the conservation community overall. These staff eventually supply the pipeline of leadership talent from which land trusts draw.”

Land Trust Examples

The following three land trust examples on leadership transition share common characteristics: a long lead time; open communication between board and staff about the transition and changing roles; planning for unrushed transfer of key relationships, roles and knowledge; board/leadership team support for creating a thoughtful process; and time for cultivating new leadership.

TRANSITION COMPLETE: MONTANA LAND RELIANCE

When the Montana Land Reliance faced the retirement of one of its three managing directors several years ago, the organization used a long transition period to its benefit. The departing director, Bill Long, had introduced his intent several years in advance, allowing the group to select a successor in a relatively unhurried process. New director Doug Mitchell was hired in September 2007, beginning on a part-time basis and transitioning to full-time in January 2009. Long continued on through May 2009. Managing Director Rock Ringling explains that this long transition period and overlap between departing and incoming directors allowed smooth transfer of leadership relationships and roles. The organization’s three-way shared leadership model also eased the transition, since not all the roles and responsibilities rested on one desk. The long ramp-up also allowed Montana Land Reliance to approach hiring deliberately, seeking and recruiting the right person rather than simply advertising and picking from respondents.

TRANSITION IN PROGRESS: COASTAL MOUNTAINS LAND TRUST

Scott Dickerson has been talking openly with his board about his expectation to retire within the next few years. As a result, the board and staff are engaged in a broad discussion about the challenges and opportunities his departure presents, as well as the board’s role in addressing the transition. For example, having board members experienced in recruiting and developing leadership staff is valuable. And, the new executive director will need a strong partnership with the board for introductions to the community and key relationships. Ideally, the board will be strengthened in fundraising capability to minimize any fading of support during the transition. As Coastal Mountains reviews its current strategic plan and designs its next one, it will incorporate goals and specific board actions relating to the upcoming transition.

ADVANCE PLANNING FOR TRANSITIONS: PIEDMONT ENVIRONMENTAL COUNCIL

Heather Richards explains that Piedmont Environmental Council’s recent strategic planning process led staff and board to look more closely at potential gaps in its succession planning. Key positions involving specialized technology (GIS, membership, information technology) as well as leadership roles were identified in which the staff persons manage unique knowledge or relationships for the organization, and that knowledge would be very difficult to reconstruct should something happen to the specific individuals. In response, PEC is taking steps to create more

Scott Dickerson explores a recent conservation project. He has been talking openly with his board about his expectation to retire within the next few years.



Heather Richards' experience at the National Conservation Leadership Institute helped her prepare for a mid-career move into management. The NCLI runs an annual educational program for 36 conservation professionals from natural resource conservation organizations all over the country, who participate in an intensive peer group experience to cultivate adaptive leadership skills.

redundancies in its systems. Regular meetings between junior management staff and senior leadership are serving to create a wider group of people with the knowledge to “move the ball forward” for the organization. Written policies and procedures, and in some cases additional staff, will help address potential gaps in the transfer of technical information and roles.

Additionally, PEC leadership strongly supports leadership training opportunities as a means to enrich and strengthen the staff, the organization and the greater conservation community. Richards' participation in the National Conservation Leadership Institute (see caption) helps to grow PEC's capacity for leadership in its evolving regional context. And while PEC is not facing imminent retirement of its leaders, its proactive effort to cultivate leadership qualities among staff helps stabilize the organization for future transitions.

Cultivating the Next Generation

A handful of groups around the country have started to train the next generation of environmental leaders, a potential source of young and diverse board members or other leaders for the land trust community. The Center for Diversity and the Environment in Portland “racially and ethnically diversifies the U.S. environmental movement by developing leaders, diversifying institutions, and building community through its trainings and initiatives.” Partnering with the Center for Whole Communities, an early leader in urging the diversification of the land

conservation community, the two groups have developed “2042 Today.” An innovative leadership development program, the initiative will prepare young conservation leaders from all backgrounds to strengthen their collective work.

In Houston, the United Way developed a model program called “Project Blueprint” that for more than 20 years has prepared emerging leaders of Houston's African American, Asian and Hispanic communities to fill key roles on nonprofit boards and board committees.

Project Blueprint alumni, as well as businesses and associations, recommend candi-

dates who then listen to a panel of graduates speak about their Project Blueprint experiences. “It is the graduates' testimonials that truly sell the program,” writes Karen White, leadership development manager at United Way of Greater Houston.¹ Once selected, participants attend a 10-week training program covering all aspects of nonprofit governance, and upon completion are placed on nonprofit boards and board committees throughout the Houston community.

Many land trusts around the country start training the leaders of tomorrow much earlier, through environmental education programs where children learn to care about nature. Sarah Mayhew didn't know about careers in conservation until as a child she hiked on land protected by the Little Traverse Conservancy in Michigan. She has just been hired as education specialist at the land trust. Aquidneck Land Trust in Rhode Island recently launched a Young Friends Membership Program, offering full membership benefits to anyone 25 years or younger for half price. Could one of those “young friends” lead the land trust one day? Only time will tell. 🍀

1 “A Colorful Blueprint,” *May/June 2009 edition of Board Member, Volume 18, Issue 3. BoardSource* © 2010

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Resources

BOARDSOURCE: www.boardsource.org

FOUNDATION CENTER: <http://foundationcenter.org/getstarted/topical/succession.html>

INSTITUTE FOR CONSERVATION LEADERSHIP: www.icl.org

NATIONAL CONSERVATION LEADERSHIP INSTITUTE: www.conservationleadership.org

Ask your regional or state land trust service center about consultants who work on leadership transitions

Contact your regional Land Trust Alliance office: www.lta.org/about/regional-programs

Rally: The National Land Conservation Conference: www.lta.org/rally