Interim Leadership Guide and Talent Pool

mission X CAPITAL

To the Power of Good

mission CAPITAL

Table of Contents

What is an Interim Executive Director? 4

About our Certified Interim ED Program 4

QUALIFICATIONS AND TRAINING 5

HOW MISSION CAPITAL SUPPORTS NONPROFITS 6

How to Hire an Interim ED 6

CLARIFY THE ROLE 6

FIND THE RIGHT INTERIM LEADER 7

CONSIDER A COMPENSATION PACKAGE 7

How to Work with Your Interim ED 8

INTERIM ED ONBOARDING 8

ORGANIZATIONAL ASSESSMENT 8

ONGOING COMMUNICATION AND MANAGEMENT 9

Additional Resources for Executive Transitions 9

HIRING YOUR NEXT EXECUTIVE DIRECTOR 9

MERGER CONSIDERATIONS 9

RECOMMENDED READING LIST 9

Certified Interim Executive Director Talent Pool 10

What is an Interim Executive Director?

Simply put, an interim Executive Director is the Executive Director hired for a limited transition period. Done right, an interim Executive Director is someone who provides stability and steadiness while galvanizing board, staff and stakeholders to strategically adapt during a time of change.

Through Mission Capital's efforts and leadership both locally and as part of a national group of thought leaders and practitioners, we emphasize the following **core competencies for successful, strong interim executives**:

→ **Independent.** Objectivity is especially important during a transition. Not only will this person not be associated with the prior leadership, they have no personal agenda or bias about the next steps for the organization and are better able to focus on the mission and sustainability.

→ **Record of success.** Previous Executive Director experience (and strong references) will ease the transition. An organization's transition between leaders can be a delicate time, and this is not the time for someone to learn how to do the job for the first time.

→ **Calm in the storm.** Part of what makes this a delicate time is uncertainty. The insecurity of staff, board, volunteers, clients, donors, and anyone that your organization touches is high. People wonder who the next leader will be, what direction they'll take things, and what changes will come. It is important to have an interim on site with the demeanor and credentials to provide stability and assurance based on experience and information.

→ **Dynamic.** Since it's important to leverage the transition to pivot the organization and prepare for the next phase of success, it is crucial to have an energizing leader who can rally the team to continue services, make necessary changes and stay focused on mission.

This guide is designed to help your organization think through your leadership transition and engage an interim Executive Director. If you would like to discuss your unique situation with our team, please contact us at info@missioncapital.org.

About our Certified Interim ED Program

Launched in 2008, the Interim Executive Director program is an important part of Mission Capital's effort to support nonprofit organizations during the transition of a key leader. The program has trained dozens of Interim Executive Directors who have provided critical interim leadership to the Central Texas nonprofit community.

Mission Capital believes the placement of a highly-skilled interim Executive Director (interim ED) is a best practice for organizations experiencing a leadership transition. A well-prepared interim leader can guide the organization through a potentially detrimental period by managing this time of change and uncertainty, maintaining day-to-day operations and helping the board and staff lay the groundwork for success, all while an intentional search for a new Executive Director is conducted. To serve organizations during executive transitions, Mission Capital proactively recruits and trains a pool of individuals who are qualified and available to serve as certified Interim Executive Directors in our community.

QUALIFICATIONS AND TRAINING

We have developed a robust recruitment and training process during which we evaluate applicants' skills, experiences and personal attributes. All qualifying candidates must have:

Essential Skills

- → Successful tenure as a full-time Executive Director of a nonprofit for two or more years
- → Strong working knowledge of nonprofit management, including financials, human resource management and strategic planning
- → Ability to focus on key administrative and transition-related tasks in a less-than-full-time scenario
- → Clear and confident communicator who can diplomatically relate to all stakeholder groups (including board, staff, donors, volunteers, funders, etc.), through both spoken and written verbal skills
- → Honed active listening skills; proficient at giving and receiving honest feedback
- → Facility for timely compliance with protocols for reporting and record keeping

Preferred Experience

- → Analytical writing skills and strong ability to synthesize data clearly and succinctly
- → Expertise conducting organizational assessments
- → Ability to use multiple computer systems and technology and to easily adapt to new ones (e.g., systems for financials, systems, and data management)
- → Nonprofit consulting experience

Personal Attributes

- → A calm and reassuring presence that can allay anxieties, fears and doubts inherent in transitions
- → Adaptable mindset and work style to adjust to new information and expectations throughout a placement
- → Commitment to service and excellence in the nonprofit sector
- → Professional desire to work in nonprofit agencies unsettled by major challenges and changes
- → Desire to lead and model leadership

The application process includes a skill assessment, written essays, personal interview, background checks, and reference checks. Once selected for the program, each candidate participates in a three-day training in order to become a Mission Capital Certified Interim Executive Director.

The three-day training focuses on how these professionals can pivot their experiences and skills to the interim Executive Director role, and includes:

- → Understanding best practices for leadership transitions in the nonprofit sector
- → Key components of interim leadership
- → How leadership differs during an organizational transition
- → Organizational dynamics, change management, and life cycles
- → Conducting organizational assessments and their role in a transition

HOW MISSION CAPITAL SUPPORTS NONPROFITS

Through our certification program, Mission Capital has developed a ready-made set of leaders who are ready and able to serve as interim Executive Directors during your leadership transition. In addition to having talent pool of certified interim Executive Directors available, Mission Capital has developed this guide as a resource to help you assess needs, reach out to candidates and engage a professional Interim ED. We also provide other services to support your transition, including organizational assessments and facilitation of your board's search for the next ED.

If you'd like to discuss your needs in more detail to assess the support you need, please contact us at info@missioncapital.org to be connected with our consulting staff.

How to Hire an Interim ED

CLARIFY THE ROLE

The job of an interim ED is different from the job of a regular ED, so begin by clarifying what you want the interim to do during the transition period. As a note, while some refer to "regular" Executive Directors as "permanent" Executive Directors, this is inaccurate, unrealistic, and legally unwise, so we use the term "regular" when discussing the non-interim leadership.

There is not a one-size-fits all approach since organizations have different size staff and varying priorities. Think about **key management and accountability issues** such as staff support, leadership, financial management and stewardship. Ask your board and staff: "What are the highest priorities and needs of the organization in the next 6 months?"

In general, the interim job should be considered **part-time**, even though we all know that even a full-time ED job is never limited to a 40-hour-work-week commitment. There are multiple reasons for this:

→ There are some typical ED roles that are not appropriate for a temporary leader. For example, it's ultimately not productive to have an interim leader establish relationships with your donors or the community and then have to re-introduce a new leader to these stakeholders when you hire your next ED. Accordingly, **an interim's job is mostly internal-facing and does not include the full job description of a regular ED**, so you can leave out marketing, fund development and stewardship in most cases.

→ No matter how good your interim is, the **goal is to move to your next regular ED and organizational steadiness as quickly as possible**. When a board and staff feel that everything is being covered perfectly by a leader they like (the best case scenario for any interim ED), they feel less anxiety and motivation to **move the search forward**. Engaging a part-time leader reinforces the temporary gap and drives the search process forward.

As you build the job description, think about how **continuing staff and board members might take on additional leadership roles** during the transition and how they will partner with the interim. Even though the job description and priorities will likely change once the interim ED completes an organizational assessment, begin with a set of anticipated roles and priorities for the Interim ED in key areas like staff management, financials and operations.

FIND THE RIGHT INTERIM LEADER

Rather than presuming that your Executive Committee is the right team to interview your candidates, create a **Transition Committee** that can steward the period of transition until your next regular Executive Director. This committee should be comprised of 4-6 board members of varying tenure and experiences and can even include a former board member or major external stakeholder. This group affirms roles during the transition, interviews and selects the interim ED, and leads the search for the next ED. By centralizing these roles in a single group, the focus on the transition and next phase of success is amplified and consistent.

The Transition Committee's first job should be reviewing the Certified Interim ED profiles provided by Mission Capital and selecting 2-5 candidates to contact. Be prepared to share details about your **timeline** (both how quickly you would need someone to start and how long you envision them staying), **compensation**, what you anticipate to be the **major priorities and needs** for the transition period, and details on your **operations** (e.g., budget size, staff size, primary programs) and possible **concerns** (e.g., staff morale, upcoming events, board dynamics).

Treat the interview process as a practice round for hiring your next regular ED by having questions that you ask all candidates and ensuring that all committee members have a voice in the process.

It is a natural instinct to believe that you should hire an interim ED with specific expertise in the subject area of your mission. However, we have learned that the more important criteria is that they have **expertise in the type of operational and management issues** that you anticipate being the focus of the transition period. Since the interim ED will be functioning primarily behind the scenes, they will not be the voice of your mission and vision in the community, but they will be facilitating and championing the work of the board and staff to achieve it. Accordingly, expertise and tenure as a nonprofit professional becomes the more relevant piece of hiring during the interim phase.

CONSIDER A COMPENSATION PACKAGE

As you build the job description and begin envisioning the role, you'll need to develop a **compensation package** for your interim ED. Use your outgoing ED's compensation as a starting point, and remember that this included salary, taxes and benefits. In most cases, multiplying the salary by 1.25 will help you begin with the amount that you have already allocated to the leadership role. Depending on how that compensation correlates with the market, it is likely not going to be the exact amount that you'll now pay an interim ED, but it is a useful place to begin.

Consider the following elements in determining compensation:

- → **Market rate:** How does your outgoing ED's salary compare to the market rate? If your nonprofit is a Mission Capital member, you can schedule a time to review the salary comparison data, but you may already have a sense of whether you are paying a competitive rate.
- → **Anticipated hours:** How many hours will the interim ED be working? It is not as easy as multiplying by 0.75 if the interim ED is working 30 hours per week, but it is a place to start.

- **Experience:** Something we have learned from coordinating this program is that the individuals in our Certified Interim ED talent pool tend to have more experience than most current or future EDs you will hire. Accordingly, their hourly rate tends to be a bit higher than your regular ED's. Since you have the outgoing ED's whole compensation package to work with, this tends to not be an issue, but it is something to understand.
- **Temporary employee or independent contractor:** Do you need to have your interim ED sign checks? If so, you probably want to hire them as a temporary employee. This also makes it clearer that they will be covered by your directors and officers liability insurance policy. However, you or the interim may have a compelling reason to fill the role as an independent contractor. If you go that route, you will likely pay a slightly higher hourly rate, but you will not have a tax liability to go with it.

How to Work with Your Interim ED

INTERIM ED ONBOARDING

Onboarding is an **intentional education process** to bring your new leader into the organization and prepare them for their new role. Think about their **tactical and operational needs** like keys, passwords, computer access and knowing how to find documents online and in the office. And make sure to cover **strategic elements** like walking through the financials, strategic plan, and logic models and your theory of change.

A transition is a strategic time to **conduct an organizational assessment**. Having your interim ED lead this process in their first month is a great way to understand where your organization currently stands and orient the interim to your organization. Not only will they develop a soup to nuts understanding of your organization, they will also interact with board, staff, and other stakeholders in the process and begin to establish working relationships. Again, this will be good practice for when you hire your regular ED. Take note of what works and what you overlooked so you are able to be even more thorough in a few months.

ORGANIZATIONAL ASSESSMENT

Despite everyone's best intentions and attentiveness, it is rare that the board and staff have a comprehensive understanding of all the key elements of a nonprofit's operations. Beginning the transition period with an objective organizational assessment establishes a clear picture of where the organization stands, getting all stakeholders on the same page. As part of the certification program, members of the Certified Interim ED talent pool learn how to conduct an organizational assessment. If you would like Mission Capital to support the interim ED's work or extend their capacity by spearheading the assessment process, we are happy to discuss that with you.

Once the organizational assessment is completed, your organization can leverage the observations and recommendations by:

- Developing a work plan for the transition to target the most urgent needs;
- Updating your interim ED's job description and goals for the placement;
- Informing your ED search with a clearer understanding of the organization's needs;
- Building your next ED's goals for the first 90 days and first year; and
- Providing a running start to your next strategic planning process.

ONGOING COMMUNICATION AND MANAGEMENT

It is the board's job to supervise and evaluate the Executive Director, so talk with your interim ED at the beginning of their placement to establish a plan for working together. Mission Capital recommends that for the first few weeks, the interim ED and Board Chair or Transition Committee Chair meet in-person. Once you have established a rapport, consider meeting every other week, having some of the meetings over the phone, or asking for a weekly email update.

Additional Resources for Executive Transitions

HIRING YOUR NEXT EXECUTIVE DIRECTOR

As part of our support of the nonprofit sector—and boards in particular—Mission Capital often facilitates the ED search process in a way that leverages board, staff, and interim ED skills, expertise and time. If you are interested in learning more about our support in this area, please contact us to schedule a time to meet with one of our consultants.

MERGER CONSIDERATIONS

Many nonprofits use their leadership transition as a time to consider merging with another organization as it tends to be a more favorable situation when there is already one vacant ED position. During the interview process and interim ED placement, make time to ask how they might support a merger process as part of their work. This is another area that Mission Capital regularly consults on, so contact us to discuss how you might approach this and what you should consider.

RECOMMENDED READING LIST

As you prepare to hire an interim ED and manage the transition period for your organization, you may find these additional resources helpful:

- → Much of Mission Capital's initial research and decision-making on how to interim ED and leadership transitions services was shaped by a series of "monographs" funded by the Annie E. Casey Foundation and the Walter Haas Jr. Fund, which you can access online and share with board and staff at your organization.
- → As part of ongoing thought leadership to support the Central Texas nonprofit sector, Mission Capital has researched and reported on topics including career trends, mergers, size, scope and effectiveness of area nonprofits. Each contains details that are relevant to transitions. You can find all research reports on our website.

If you're looking for additional resources, leadership training or consultative support, please contact us at info@missioncapital.org.

Certified Interim Executive Director Talent Pool

Mission Capital is happy to provide the following profiles of our Certified Interim Executive Directors for your board to review. We have worked with each candidate to develop an overview of their experience. However, these profiles are not comprehensive descriptions of all that they have achieved, but rather a high-level and consistent way of highlighting their skills and expertise.

We encourage you to reach out to 2-5 candidates to assess their interest and availability, and to ask for a complete resume. We update the materials periodically, and while all of the individuals included are interested in serving nonprofits as interim EDs, there is a possibility that some of them may not be available for the period that you are needing.

If you have any particular challenges reaching or working with anyone in this guide, please let the Mission Capital team know by contacting us at info@missioncapital.org.

Amy Loar

Amy started her nonprofit career fresh out of college and her passion for the sector has kept her there since. She finds that the most opportunity comes in times of crisis. Amy is excited about seeing different organizations that are doing good work around the city and seeing how each one uses their strengths and handles their weaknesses.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning

Executive Director Experience

- Ascend Center for Learning

Other Professional Experience

- Director, Dionysus Theatre
- Account Executive Research Analyst, Special Audience Marketing/Research Project
- Project Director, Texas Appleseed

Education

- Masters of Public Affairs, University of Texas at Austin, LBJ School of Public Affairs
- BA, Government and Psychology, University of Texas at Austin

Community/Volunteer/Board Experience

- Girls Giving Grants (G3), Advisor
- Bible Study Fellowship Discussion Leader

Amy Loar

FINANCE ▪ HUMAN RESOURCES ▪ LEGAL ▪ MANAGEMENT ▪ PROGRAM ADMINISTRATION & DELIVERY ▪ STRATEGIC PLANNING

Amy is extremely effective communicator, in both professional and interpersonal situations. When I personally face a challenge in communicating, I often think, 'what would Amy sad/do?' Specifically, she communicates clearly and politely, she is always honest, she is a good listener, she is engaging, poised, confident and comfortable speaking to individuals or groups and she is exceptionally good at adapting her manner of communication to match the audience.

- Ravelle Goins
Senior Research Analyst, Answers Research

Amy is a great one-on-one communicator. Her office door was always open to her employees with questions or concerns. She led meetings with confidence and efficiency, never wasting her employees' time on unnecessary information. You can tell that Amy is concerned with her employees' well-being and job satisfaction, while continuing to make the best decisions for the larger program. She is a highly efficient ED, concerning getting things done in the organization and finding ways to improve the programs she directed.

- Amanda Way
Former Employee

Contact Information

512-731-8109
amyloar@hotmail.com

Carol Drennan

Carol is an active listener and a strategic thinker with a business background in project management. She leverages these skills to provide calm, rational leadership to organizations in transition, supporting board building, fund development, human resources and financial changes.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning

Executive Director Experience

- Habitat Texas, 2005-2006

Interim Executive Director Experience

- kidsActing Foundation, 2014-2016
- First Unitarian Universalist Church of Austin, 2014
- The Children's Advocacy Center Serving Bastrop, Lee & Fayette Counties, 2013-2014
- NARAL Pro-Choice Texas, 2012
- Austin Habitat for Humanity, 2011
- NARAL Pro-Choice Texas, 2006-2007
- Austin Habitat for Humanity, 2003-2004

Other Professional Experience

- Nonprofit Management & Transition, Consulting, 2015-2016
- Project Management, Consulting, 1996-1998
- Stonehouse & Company, Dallas, Senior Project Manager, 1986-1996
- US Department of State Foreign Services, Genoa, Italy, 1964-1966

Education

- MLS, Library Science, Texas Women's University
- BA, French and Russian, Purdue University
- Harvard University Graduate School of Business - Leadership Conference

Community/Volunteer/Board Experience

- Leadership Texas 2011
- Leadership Austin 2009
- City of Austin Robert Mueller Municipal Airport Plan Implementation Advisory Commission Board
- East Communities YMCA
- NARAL Pro-choice Texas
- Austin Habitat for Humanity

Carol Drennan

CHANGE AGENT ▪ BOARD DEVELOPMENT ▪ CRISIS MANAGER ▪ ORGANIZATIONAL ASSESSMENT ▪ STRATEGIC PLANNING

Because of Carol's experience of stepping into more than a few transition situations, I know that she approaches each with humility and desire to build stability. She is communicating clearly, and setting expectations. She is very good in difficult situations, because of her calm approach.

- Michael Willard
Senior VP, Goodwill Industries
Worked with Carol while CEO of Austin Habitat for Humanity

I would describe Carol as a collaborative communicator. She always listens, is diplomatic, but is also able to effectively express her opinion even if that opinion differs from other opinions. Carol is able to provide a calm and steady influence even when she walks into chaos or confusion. Carol is organized, level-headed and understands how to marshal resources and talent in a productive fashion.

- Catherine Mauzy
Board Certified Attorney, Family Law, Mauzy & Tucker, PLLC
Worked with Carol while at the NARAL Pro-Choice Texas Board

Carol approaches her role as a leader and manager in a low-key, practical, and logical manner. She has the ability to sort out a mess into its basic components and identify what's needed to fix things and make them work better. She has good instincts in working with people and is patient and kind in her dealings with even the crankiest board members and staff.

- Kaye Beneke
Kaye Beneke Public Relations & Communications
Worked with Carol with on the kidsActing Board

Carol prepares for any situation ahead of time, and delivers her message in a calm and professional way. When things go off track, she carefully and quickly makes changes.

- Lynn Gilman
Former Executive Director of kidsActing Foundation

Contact Information

512-964-3226
carol.drennan@gmail.com

Gretchen Flatau

Gretchen decided she wanted to work with nonprofits when she was in college and she's never gone back! She overcomes organizational challenges fearlessly by listening calmly to all the stakeholders and negotiating solutions that work for everyone.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Finance ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning

Executive Director Experience

- College for All Texans Foundation. 2009
- Mothers' Milk Bank at Austin. 2000-2008
- Texas Unit of Recording for the Blind, Inc. 1990-1991
- Women's Advocacy Project, Inc. 1989-1990

Interim Executive Director Experience

- Ben's Friends
- Waller Creek Conservancy
- College Houses, YEAR
- CASA of Bastrop, Lee & Fayette Counties
- Austin Parks Foundation, YEAR
- Faith in Action Caregivers Northeast Austin
- YouthLaunch
- Mothers' Milk Bank

Other Professional Experience

- Consultant, Nonprofit Management and Transition Specialist. 2010 – Present
- Director of Development and Marketing, Austin Children's Museum. 1998-1999
- Program Director, Community Organizer

Education

- Masters of Public Affairs, University of Texas at Austin, LBJ School of Public Affairs
- BA, Sociology, Newcomb College of Tulane

Community/Volunteer/Board Experience

- Verdance HOA Board President
- Heritage Neighborhood Association
- LIVESTRONG
- Children's Charitable Alliance of TX
- Austin Council of Parent Teacher Associations

Gretchen Flatau

BOARD DEVELOPMENT ▪ DEVELOPMENT & FUNDRAISING ▪ FINANCE ▪ HUMAN RESOURCES

I have known Gretchen for over three years now as the interim ED for both the Austin Parks Foundation and the Waller Creek Conservancy. Gretchen is direct, thoughtful and strategic. She is a very good communicator both verbally and written. Gretchen really, really knows her role, the goals and objectives and the sense of timing in her roles. I consider her to be the perfect "pilot fish" that allowed us to assess, decide, clarify and move forward with an increased focus and tempo.

- Daniel Woodroffe
President, dwg – urban architectural landscapes

Gretchen has experience in a lot of different environments and this knowledge gives her a calming presence and the experience to suggest solutions to various situations. We went from an Executive Director and three staff members to an Interim Executive Director and one staff member in the time frame of about two months. Gretchen hired two new staff members and kept the foundation running smoothly. During the transition, she did some analytical work, finished our annual audit and suggested some accounting procedures that would give us better methods for tracking various project's revenue and expenses. She also interviewed board members, shareholders and clients of APF and prepared a strategic plan for our foundation going forward with our new Executive Director. Because of our experience with Gretchen, I'm a big fan of Mission Capital's IED Program.

- Ralph Webster
Private Business Owner
Worked with Gretchen while Board President at Austin Parks Foundation

Contact Information

512-789-7284
gflatau@austin.rr.com

Howard Chalmers

Howard understands the nuances of short-term management assignments and their impact on both staff and existing programs. He is skilled at facilitating an organization's identification of strategic decisions and new business opportunities and then helping to map out plans to achieve them.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities

Executive Director Experience

- Lance Armstrong Foundation, President/CEO, 2000-2002

Interim Executive Director Experience

- Public Broadcasting Service, Acting SVP-Development, 1978 & 1992
- Public Broadcasting Service, Acting SVP-Education Services, 1990
- University of Texas Football Centennial, Coordinator, 1991

Other Professional Experience

- Chalmers & Company, Principal, 1978-present
- Multimedia Games, Inc., SVP, 2003-2008
- Austin City Limits, Executive Producer, 1976-1977
- KLRN-TV, VP Development, 1976-1977
- Capital National Bank-Austin, VP Marketing, 1968-1975
- Texas Broadcasting Company, Newscaster, 1966-1967

Education

- BA, University of Texas at Austin
- School of Law, University of Texas at Austin
- Graduate School of Journalism, University of Texas at Austin

Community/Volunteer/Board Experience

- Wine & Food Foundation of Texas, President
- Capital of Texas Public Telecommunications Council, Chair
- Homeowners Association, President
- Charity Auctioneer for multiple organizations

Howard Chalmers

LEADERSHIP TRANSITION ▪ STRATEGIC FUNDRAISING ▪ INTERIM MANAGEMENT ▪ MARKETING & COMMUNICATIONS ▪ CRITICAL PLANNING

He has a keen mind, able to analyze problems and lay out a set of solutions mutually developed with those affected by his decisions. His depth of organizational training and experience is remarkable. He is articulate. He is intuitive. He is bright, good humored, and collaborative. Howard can be trusted to do the right thing at the right time. It has always been a joy to work with him – even while doing some of the most demanding tasks that I've undertaken in my entire career.

- Bruce Christensen
Retired/Former CEO, PBS

Howard has been a consultant to many organizations during the past decade and he has a terrific ability to enter an organization, assess the challenges, and implement a plan of action. I respect that Howard has an ability to connect with people, align teams with specific goals, implement strategic plans, and do all of this with the utmost integrity.

- Doug Ulman
President/CEO, The LIVESTRONG Foundation

I have personally witnessed Howard's work in bringing a chaotic situation under control, dealing with multiple internal and external stakeholders to "right the ship," then leading the effort to implement long term stable management. His experience, gravitas, and style ensure that he will be able to handle any situation.

- Dennis Cavner
Past Chairman of LIVESTRONG

Contact Information

512-658-6083
hchalmers@chalmersco.com

Jack Hendren

For the last 20 years, Jack has been a church pastor in various areas of North America. From September 1999 until 2001, he was the managing director and founder of the Church of God, a Christian Fellowship. He structured the organization, hired all employees, qualified as a 501(c)(3) organization and managed the day-to-day operations. He also facilitated a merger into a larger church in August, 2001.

Skills and Expertise

Board Development ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Management of Operations ▪ Strategic Planning ▪ Marketing & Communications ▪ Technology ▪ Nonprofit Financial Policy Development ▪ Human Resources

Executive Director Experience

- Church of God, a Worldwide Association & United Church of God, an International Association of Allen, TX & Milford, OH. 2001-2015
- Church of God, a Christian Fellowship Ft. Worth, TX 1999-2001
- Global Church of God. 1996-1999
- Ashlar Incorporated. 1992-1996

Interim Executive Director Experience

- Founder/Managing Director, Church of God, aCF
- Coordinator/Elder, Youth Ministry, 14 years

Other Professional Experience

- President/CEO and executive positions in computer industry for 25 years
- Officer, U.S. Navy, 7 years

Education

- MS, Operations Research. US Naval Postgraduate School
- BA, Math & Physics. Hanover College

Community/Volunteer/Board Experience

- Board Member, Church of God, aCF

Jack Hendren

MANAGEMENT ▪ PROGRAM ADMINISTRATION & DELIVERY ▪ TECHNOLOGY ▪ MARKETING

I have known Jack Hendren for about 20 years. He has a clear, understandable style of work and communicates clearly. He is one of the most sincere and ethical people with whom I have worked. He is the one who provided for our group to serve as the facilitator for our organizing process. I have no concerns about his serving in this capacity.

- George Meeker
Pastor & Board Member, Church of God aCF

My first-hand witness was observing Jack Hendren moderate a very serious crisis after the breakup of an organization. He was able to direct and guide the startup of a new organization. I most respect his character and ability to be a peacemaker. He possesses the heart of a servant.

- Eric Evans
Pastor, *Church of God aCF*

Contact Information

361-779-9662
jackhendren@earthlink.net

Margo Weisz

Margo focuses on the nexus of entrepreneurship and social mission. She is a problem solver, with a history of working in diverse communities. By listening to a variety of perspectives, she draws on the talents of different stakeholders to inspire action. She is a purveyor of creative thinking and street smarts, in service to people working to change the world.

Skills and Expertise

Strategic Decision Maker ▪ Finance ▪ Development & Fundraising ▪ Management & Operations ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities ▪ Board Development

Executive Director Experience

- City Lights Group, Founder/Partner
- PeopleFund, Founder/Executive Director

Other Professional Experience

- University of Texas, McCombs Business School and LBJ School of Public Affairs, Adjunct Professor
- Chaired the Mayor's Task Force on Small Business
- Formed and Managed the Mayor's Task Force on Aging

Education

- University of Texas, LBJ School of Public Affairs
- BA in English, Colorado College

Community/Volunteer/Board Experience

- AustinUP, Board Member
- Texas Energy Poverty Research Institute, Board Member & Treasurer
- IMPACT Texas, Founding Steering Committee Member
- Task Force for Waller Creek Palm Park Project
- Bank on Central Texas, Steering Committee
- National CDFI Coalition, Board of Directors
- Alliance for Public Transportation, Board
- German Marshall Fund, Transatlantic Cities Coordinator
- OFN Next American Opportunity Initiative, Steering Committee and Writer
- Texas Mezzanine Fund, Board of Directors
- Washington Mutual, Texas Community Council

Margo Weisz

FINANCE/FUNDRAISING ▪ STRATEGIC DECISION MAKER ▪ BOARD DEVELOPMENT ▪ HUMAN RESOURCES ▪ MARKETING ▪ MANAGEMENT

Margo has the ability to quickly assess complex situations and consult with relevant parties to identify potential solutions and pathways to move forward. Margo encourages her team to perform required tasks without micro-managing, yet she is willing and able to intervene when she deems it to be necessary and appropriate.

- Cloteal Davis Haynes
Principal at Haynes, Eaglin, Waters
Long-time Board Member of PeopleFund

Margo is direct, collegial and relatively informal. As the founder and ED of her own nonprofit for 15+ years, Margo had to weather many challenges, which I witnessed first-hand. She is well-positioned to serve as a calming presence as an Interim ED.

- Frank Fernandez
VP of Community Development, PeopleFund

Margo is a very direct person, which is a huge asset in an ED. She's not rude or inconsiderate, but she's a "what you see is what you get" type person. She doesn't have any hidden agendas. She tries to help her employees grow and work together. She doesn't think she is above anyone, she makes working for her so nice. She gives direction and guides her employees, but she will let them take chances in order for them to grow.

- Barbra Boeta
Program Director at EGBI, People Fund

Contact Information

512-789-8223
margo@citylightsgroup.com
www.citylightsgroup.com

Michael Pursley

By practicing servant leadership, Michael's goal has always been to look for and mentor the person or persons who would replace him. Michael is a firm believer in placing the right people in the correct position and then freeing them to do their job.

Skills and Expertise

Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities

Executive Director Experience

- Next to New, Executive Director
- EDC, Executive Director

Other Professional Experience

- Central Transportation Systems, General Manager

Education

- BS, Organizational Management in Christian Leadership, Colorado Christian University
- Certificate: Entrepreneurship, Colorado Christian University

Community/Volunteer/Board Experience

- Certified Lay Speaker in Methodist Denomination
- Trained Stephen Minister
- Business Ethics Award, Runner-up

Michael Pursley

MANAGEMENT ▪ MARKETING ▪ ORGANIZATIONAL ASSESSMENT ▪ PROGRAM ADMINISTRATION & DELIVERY ▪ STRATEGIC PLANNING

Michael, thank you for being a great boss at Next-to-New. You have created a wonderful place for us to volunteer, serve others and put our faith into action. We are especially grateful that you take time to visit with us and shake our hands during our shifts. Your friendly and outgoing actions make us feel welcomed and valued. So much of the store's success can be attributed to your effective leadership. Thank you.

- Roberta, Joel, Joe & Nathan, the Super Saturday Crew

Michael is a team player that believes in developing leadership and ownership among staff. I most respect his ethics and team work. He will be an asset to your program.

- Pam O'Connor
Board President, Next-to-New Shop

Michael is a leader that works *with* his staff. Instead of giving out orders, he lays out an idea/plan and encourages staff/volunteers to come with ideas and input. He tries to make everyone feel equally valuable to the team. I know that Michael doesn't consider himself "too good" to, for example, clean the toilets if that hasn't been done. In short, he leads by example.

- David Fridlund
Assistant Manager, Next-to-New Shop

Contact Information

512-791-6259
michael@smpursley.com

Rebecca Borchers

Rebecca has broad experience in both the non-profit and business sectors. She enjoys change management, mentoring staff and collaborating with boards of directors and community leaders. Her communications skills and sense of humor make her extremely effective in cultivating a positive and productive work environment.

Skills and Expertise

Board Development ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities

Executive Director Experience

- Victoria Preservation Inc.
- Friends of the Texas Historical Commission

Interim Executive Director Experience

- Garfield Park Conservancy, Chicago
- Texas Book Festival
- Victoria Regional Museum Association

Other Professional Experience

- Development Director, Texas Historical Commission, Austin
- Associate Director, Children's Memorial Hospital, Chicago
- Director of Corporate Partnerships/ Director of Institutional Giving, Lincoln Park Zoo
- Director of Tourism, Granbury Area of Chamber of Commerce
- Main Street Project Manager City of Goliad

Education

- BA, History, University of Texas at Austin
- MBA, University of Texas at Austin

Community/Volunteer/Board Experience

- Church of the Good Shepherd, Austin
- Texas Book Festival
- Preservation Texas, Board of Directors
- Tutor, Chicago Public Schools
- RANCH Conservation Association, Board of Directors, Planning Committee, Chicago
- Christmas in Goliad, Chair
- Goliad County Historical Commission, Chair

Rebecca Borchers

BOARD DEVELOPMENT ▪ DEVELOPMENT/FUNDRAISING ▪ FINANCE ▪ OPERATIONS ▪ MARKETING & COMMUNICATIONS ▪ STRATEGIC PLANNING

Rebecca is direct, but very personable. She's enthusiastic and positive and is an excellent writer. Rebecca has the ability to quickly and carefully assess a situation and offer solutions. She is also good at internalizing her emotions, so she would be a positive force in these situations. She is also very empathetic, which would be a strong quality for an interim ED. Rebecca most enjoys collaborative management and getting employees to understand their roles and responsibilities, but is comfortable being a supervisor.

- Christine M. Zrinsky
Vice President for Development, Lincoln Park Zoo

Rebecca is friendly and disarming, while simultaneously she offers broad leadership experience. She is conscientious with high standards of integrity in regards to being true to a donors' intent and to the mission of an organization. Rebecca can effectively perceive what is needed in the big picture, then breaks that down into types of work that is required, which is then broken down as daily tasks.

- Angela Reed
Development Manager, Friends of the Texas Historical Commission

Contact Information

773-318-3363
bbchicago@sbcglobal.net

Rebecca Lightsey

Rebecca traveled to Africa in 2015 and her professional learning there gave her a deeper insight in the importance of NGOs in the U.S. In her travels, she interviewed NGOs, human rights attorneys and civil society leaders, who all are looking to the U.S. for successful models of operation. She gained a new appreciation for the strengths and weaknesses of different cultural and societal structures.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Advocacy

Executive Director Experience

- Texas Appleseed, 2006 - 2015
- SafePlace, 2004-2005
- Texas Insurance Purchasing Alliance, 1993-1994

Interim Executive Director Experience

- Volunteer Legal Services, 2016-current
- Washington Appleseed, 2015-2016

Other Professional Experience

- Program Director, Community Resource Group
- Texas Insurance Commissioner, Department of Insurance

Education

- Law Degree, University of Texas
- BA in American Studies, University of Texas

Community/Volunteer/Board Experience

- Central Health Board of Manager, Chair of Budget and Finance Committee
- Texas Freedom Network Education Fund, President
- HOPE Beijing, Founding Board Member
- Weavers of Hope, Founding Board Member
- Ann Richards School for Young Women Leaders Foundation, Founding Board Member
- AISD Board Advisory Committee
- Austin Disputer Resolution Center, Co-Founder
- Consumer Federation of American, Board Member

Rebecca Lightsey

BOARD DEVELOPMENT ▪ DEVELOPMENT & FUNDRAISING ▪ FINANCE ▪ HUMAN RESOURCES ▪ADVOCACY ▪ MARKETING ▪ STRATEGIC PLANNING

Rebecca communicates easily in a very straight forward and positive manner. She is also a very good speaker to groups. I recall telling her after she addressed a large group of several hundred people that she has a knack for speaking to large groups. She always comes across as positive, friendly and well-informed. Rebecca gives gentle guidance and empowers those whose work she oversees. She intervenes as she thinks necessary to keep work going forward in the right direction, but does it in such a way that no one is alienated or offended. She has a clear vision of goals and how to attain them, but manages in such a positive way that I sometimes thought those being managed may not have realized that she was giving them direction.

- George Butts
George Butts Law

Rebecca's approach to leadership and management is measured, responsible. I worked with her and her staff when she led Texas Appleseed and it was clear her office was mission-focused and worked well together. Rebecca clearly respects the individuals she works with, knows their strengths and works to help them grow in their role, while developing other skill sets as well. Rebecca is effective at challenging status quo, modeling the desired behavior, recognizing good performance, working with diverse groups of individuals and creating a strategic vision.

- Vicki Spriggs
CEO, Texas CASA

Contact Information

512-663-6333
rebecca.lightsey@gmail.com

Sharon Reece

Sharon began working with nonprofits because she felt life's work needed to have a deeper meaning. With over two decades of executive director experience, she has developed keen leadership instincts. She believes having people in the right positions, those they are passionate about, best accomplishes the work and mission of an organization.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities

Executive Director Experience

- Girls Scouts, 1995-2009
- San Antonio Youth Literacy, 1993-1995

Interim Executive Director Experience

- The 100 Club of Central Texas, 2013
- Austin Rowing Club, 2012

Other Professional Experience

- Texas Veterinary Medicine Foundation, 2014
- Barnabas Connection, 2014-2016
- Greenlights and Innovation+, 2013
- Sierra Club, 2011-2012
- Girls Scouts of the San Antonio Area, 1990-1993
- Great Plains Girl Scout Council, Omaha, 1985-1989
- American Red Cross, San Antonio, 1993-1995

Education

- Graduate Work in Business Mgmt., University of Texas at San Antonio
- BS, Social Services, Sam Houston State University
- University of Houston
- AA Degree, San Jacinto College

Community/Volunteer/Board Experience

- Wimberley Valley Arts & Cultural Alliance, Board Member & Board Development Chair, Established Salinas Rotary's fundraising vehicle for Relay for Life, Valley of the World Wine & Food Festival Silent Auction Chair, Children's Home Sweet Home, Fund Development Consultant

Sharon Reece

BOARD DEVELOPMENT ▪ MARKETING ▪ HUMAN RESOURCES ▪ STRATEGIC PLANNING ▪ FINANCE ▪ ORGANIZATIONAL ASSESSMENT ▪ LEGAL

She knows what needs to be done and how to do it but she is very delicate, with authority, in leading the charge... I think she really corralled a team that had no interest in being corralled, and helped to smooth the road for the new incoming executive director.

- Brianna Walsh
Associate Director, The 100 Club of Central Texas

Sharon communicates very well. I feel that if Sharon were in a leadership role, and I was her employee, she would have an open door policy. I would feel comfortable coming to her with my problems, as she would listen and we would be able to come to a solution together that was fair for all involved. Through our strategic planning process, I learned that Sharon has an innate ability to ask questions that really get you thinking. Her ability to guide this process for us, make it fun, productive and virtually painless was appreciated by all involved.

- Leah Ann Tibbits
Director, Texas Veterinary Medicine Foundation

When she became the CEO of the nonprofit of which I was President/Board Chair, that organization had confusion, frustration, governance and operational issues. She researched and analyzed the various factions to develop a plan to move forward. Sharon had no hesitancy not only in accepting the challenges, but embracing them. She has experience in bringing together merged organizations into one that is functioning and successful. Any nonprofit that has Sharon Reese for an interim executive director is fortunate.

- Connie McCrary
President and Board Chair, Girl Scouts of Central Texas

Contact Information

831-601-2395
sharonreece37@gmail.com

Susannah Erler

Susannah realized that she was a nonprofit geek because she just keeps learning and experiencing more and more about 501(c)(3)s–which has led to a Masters in Arts and Nonprofit Administration, a CFRE credential and raising over $10 million in grant funds for nonprofits. Susannah believes that creativity is at the heart of all we do; so she can be found practicing that via drawing, playing her violin, writing and sometimes tweeting.

Skills and Expertise

Development & Fundraising ▪ Marketing ▪ Management & Operations ▪ Board Development ▪ Organizational Assessment ▪ Program Design & Administration ▪ Strategic Planning ▪ Social Media

Executive Director Experience

- WQUB, National Public Radio Affiliate, Quincy, IL 2002-2004

Interim Executive Director Experience

- Hearts Unite the Globe (HUG), Supporting the Congenital Heart Defect Community, 2014-2015

Other Professional Experience

- Austin Community College, Development Officer & Grant Writer, 2009-2015
- KMFA Classical Radio, Director of Membership Development & Member Services, 2007-2009
- Workforce Solutions, Grants Development & Communications Coordinator, 2005-2007
- Broadcaster & Fundraiser at Wisconsin Public Radio, the Earth & Sky Radio Series and KUT Public Radio

Education

- MA Business, Arts Administration, University of Wisconsin School of Business
- BA, Oberlin College
- Certified Fund Raising Executive (CFRE)
- Certified Associate in Project Management (CAPM)

Community/Volunteer/Board Experience

- Friends of the O'Henry & Dickinson Museums, Board Member; Grant Professionals Association, Board Member & Event Chair; Featured Filmmaker, Faces of Austin Multimedia Program, Austin City Hall, 2005; Elected a top Austin musician, string instrument category, Austin Chronical Reader's Music Poll

Susannah Erler

DEVELOPMENT & FUNDRAISING ▪ MARKETING ▪ MANAGEMENT & OPERATIONS ▪ BOARD DEVELOPMENT ▪ PROGRAM DESIGN ▪ SOCIAL MEDIA

Susannah is an extremely intelligent, mature and capable person. Her calming presence is one of her best features. When she worked for me, she was a rock in our organization.

- Deborah Byrd
President, Earth and Sky Media

She is honest with herself and the organization she works with to identify what can and should be done. She does all of this while being extremely caring to all individuals involved.

- Nadia Barbot
Former Division Governor, Toastmasters

At the radio station, Susannah provided multiple levels of support during membership drives, organizing them so they ran smoothly in spite of the complexities involved, and she never seemed to break a sweat. She worked both on-air and off, maintaining a consistently upbeat attitude even while dealing not only with colleagues, but with many members of the public. She managed to keep several balls in the air at once and never complained. Having watched Susannah at work, I have no doubt that she can handle whatever chaos and confusion may come her way.

- Rich Upton
Former Operations Manager and Announcer, KMFA

Contact Information

512-465-9550
SusannahErler@gmail.com
www.greatergoodgeek.com
@greatergoodgeek

Tim Plant

Tim is especially skilled at working with boards, as a coach, facilitator, and partner. He has led and participated in multiple strategic planning processes as both an Executive Director and Board member, giving him a unique perspective to leading an organization in transition.

Skills and Expertise

Board Development ▪ Development & Fundraising ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities

Executive Director Experience

- Healthstar Home Health, North St. Paul, MN, 2010-2014
- St. David's Center, Minnetonka, MN, 2007-2009
- Professional Association of Treatment Homes, Minneapolis, MN, 1998-2007
- Hazelden Foundation, Hanley-Hazelden Center, West Palm Beach, FL, 1991-1998

Interim Executive Director Experience

- Healthy Futures of Texas, Interim COO, Current
- Rise Recovery, San Antonio, TX 2015-16

Other Professional Experience

- Senior VP, Corporate Marketing/ Communications, Hazelden Corporate, Center City, MN, 1995-1998

Education

- MBA, Health Services Mgmt., University of Dallas
- MA, Social Services Administration, University of Chicago
- BA, Psychology & Sociology, University of Minnesota
- Licensed Clinical Social Worker, State of TX

Community/Volunteer/Board Experience

- Sabathani Community Center, Governance Chair
- Guardian ad Litem CASA Volunteer
- Our Children, Our Future Minnesota, Inc.
- Goodwill-Easter Seals Board
- National Association of Social Workers Board
- Florida School of Addiction Studies Board

Tim Plant

BOARD DEVELOPMENT ▪ DEVELOPMENT & FUNDRAISING ▪ MANAGEMENT OF OPERATIONS ▪ ORGANIZATIONAL ASSESSMENT ▪ STRATEGIC PLANNING

He took on several difficult challenges for me when I was President/CEO of the Hazelden Foundation. He is persistent, approachable, and committed to success. His clinical and business training gives him unique skills to manage both the interpersonal and management aspects of challenging assignments.

- Jerry Spicer
Former President & CEO, Hazelden Foundation

Tim's combination of a social worker's passion and compassion for the client and employee issues and his MBA-savvy organizational and financial leadership are what I respect most about Tim. On a personal level, he is a fine, honest, sincere man dedicated to family and profession.

- Gerald Kegler
Consultant, Gerald Kegler, Consultancy

Worked with Tim while HR Director at Professional Association of Treatment Homes

Contact Information

210-758-5805 (office)
651-470-8333 (cell)
Timplant@ORGtransitions.org
www.linkedin.com/in/timothyplant

Wally Moore

Wally's experience with nonprofits, as a staff member and a board member, spans 30+ years. Most recently, he has led the Eanes Education Foundation through a period of unprecedented growth. That growth was made possible through his skill in board, staff, community, and fund development. Now, he looks forward to sharing his professional experience with organizations in transition and in need of interim leadership.

Skills and Expertise

Board Development ▪ Management & Operations ▪ Finance, including Fund Development Activities ▪ Human Resources ▪ Management ▪ Marketing ▪ Organizational Assessment ▪ Program Administration & Delivery ▪ Strategic Planning ▪ Legal Activities

Executive Director Experience

- Eanes Education Foundation, 2009-2016

Other Professional Experience

- Eanes Independent School District, 2009-2016
- KLRU-PBS, Vice President of Development, 1992-1999

Education

- Business Administration, Western Kentucky University
- University of Kentucky

Community/Volunteer/Board Experience

- Eanes Education Foundation, Board Member and President, 2003-2009
- All Saints' Episcopal Church, Capital Campaign Chair
- Leadership Austin, Class of 1998-1999
- Western Kentucky University National Alumni Association, Board President
- Big Brothers Big Sisters of Bowling Green, Board President

Wally Moore

BOARD DEVELOPMENT ▪ DEVELOPMENT/FUNDRAISING ▪ FINANCE ▪ HUMAN RESOURCES ▪ LEGAL ▪ MARKETING ▪ STRATEGIC PLANNING ▪ TECHNOLOGY

I have known Wally for approximately 8 years and his commitment to raising money for the school district was strong and evident and contagious. He inspired me to want to become more connected to the cause. Wally has an uncanny ability to stay calm and to be a calming presence. He is an excellent listener so he can easily grasp the crux of the problem. He is thoughtful in offering solutions. Wally is a strong leader and is adept at keeping the big picture and end result in mind.

- Cindy Weeks
Accounting Manager, Eanes ISD

I've known Wally personally for about 20 years. I first worked alongside Wally when we were board members of the Eanes Education Foundation. I most respect his sincerity and integrity. He is very, very bright and a big thinker. Wally is a servant leader in the truest sense. He is a good strategic thinker and can lead in that regard, but he also rolls up his sleeves and works.

- Paul Trahan
Board President. Eanes Education Foundation

Contact Information

512-431-5640
wallymoore58@gmail.com

(512) 477-5955
8303 N. MoPac Expwy
Suite A201
Austin TX 78759

info@missioncapital.org