



A Changing Landscape: Future Leadership for the Great Lakes

A Report to the Charles Stewart Mott Foundation from the Institute for Conservation Leadership
August 2015

INTRODUCTION

In order to better understand the current state of leadership development and future leadership needs, the Institute for Conservation Leadership (ICL), with support from the Charles Stewart Mott Foundation (Foundation), conducted an informal investigation to provide input on:

- How leaders in the Great Lakes are thinking about their role
- What their organizations are doing now to support leadership development
- What gaps need to be filled to achieve significant change and impact going forward

Our inquiry focused primarily on freshwater advocacy organizations in the Great Lakes region and looked to surface truths about the efficacy of leadership development in the conservation and environmental sector nationwide. We reviewed current literature on leadership development, interviewed leaders, then surveyed executives and staff working in organizations in the region, and reflected on our own experience providing leadership programming for over 25 years. We invited informants and survey participants to look toward the horizon, consider the complexity of the issues as they are evolving, and help us build a picture of what type of leadership is needed to be effective into the future and how this kind of leadership could be cultivated. The findings include suggestions for the Foundation and the field to consider.

Six themes are discussed in this report:

1. Community-Connected Advocacy
2. Strategic Collaboration
3. Effective Organizations
4. Diversity and Inclusion
5. Environmental and Conservation Career Path
6. Executive Success and Transition

Motivating and supporting bold, inspired leadership and developing future leaders is critical to the long-term success of organizations working on freshwater issues in the Great Lakes. Going forward, it will be important for leaders to manage increasing complexity and to engage a broader set of allies. They will need to work together to discern the compelling strategic issues and develop the next regional campaign.

The most effective leaders will engage authentically in communities, and understand the existing activity for economic development, public health, food systems, and more. In addition, they will work with leaders in multiple sectors. Strengthening leadership and preparing leaders to achieve greater impact into the future will take the efforts of individual leaders, organizations, and the sector’s capacity-builders and funders.

The themes and recommendations in this report are offered as suggested program ideas for consideration and discussion by organizations and funders. They are a guide to addressing leadership challenges rather than a strictly quantitative analysis. To illustrate the themes and provide context, we have included attributed quotations from interview informants. Anonymous quotes are from the questionnaire and meetings. We also reviewed reports and studies from the field of leadership development.

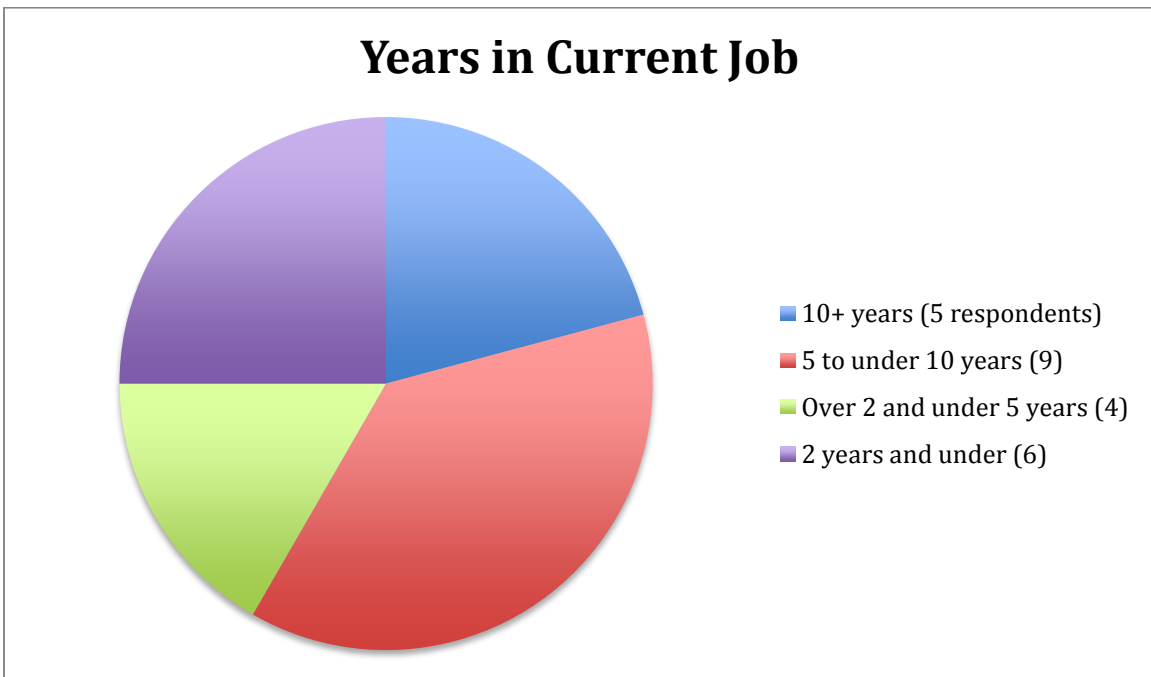
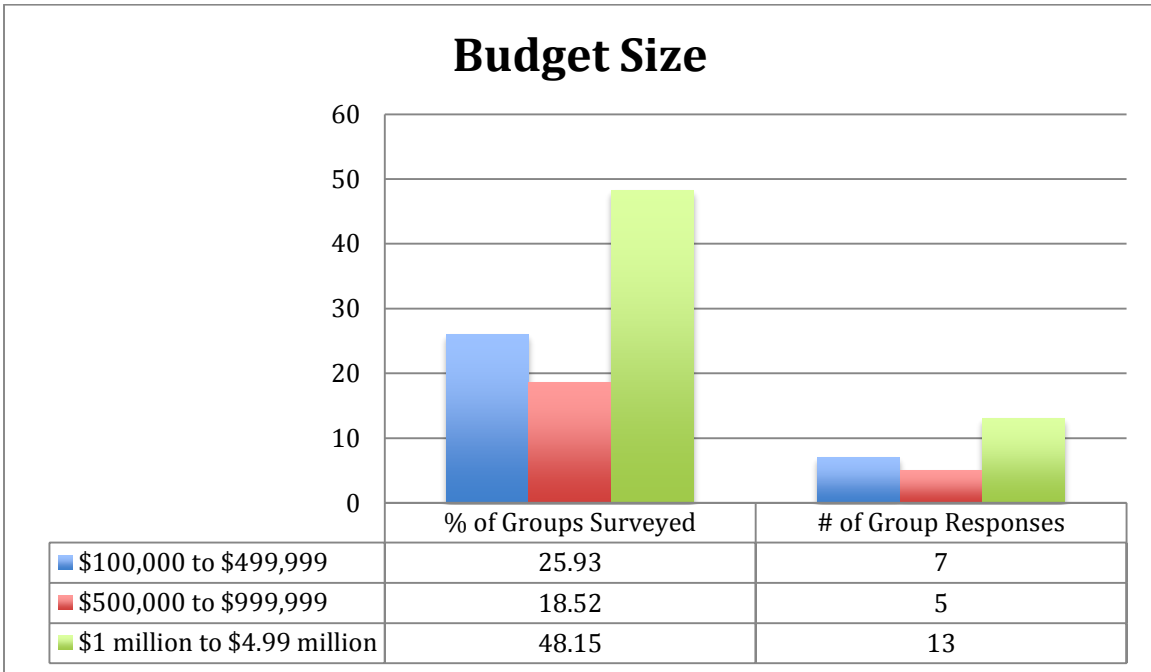
Methods, Interviewees, and Participants

During May and June 2015, ICL conducted a survey and set of interviews, and facilitated two leadership roundtable conversations. Among leaders based in the Great Lakes region, eight U.S. states and two provinces in Canada were represented. Most of the interviews and many of the respondents represent Foundation grantees. The following chart shows a breakdown of the number of respondents and their roles for each data collection method:

Method	Respondents	Roles
Survey	27	12 executive directors 10 senior staff 5 program managers
Interviews	18	7 executive directors 6 senior staff 4 national experts in nonprofit leadership 1 foundation officer
Roundtables (Chicago and Toronto)	9	4 executive directors 5 senior staff

Many respondents (44%) indicated that they work in organizations with 4 to 7 staff followed by thirty-seven percent of respondents (37%) indicating that their organizations have 20 or more staff. Two-thirds (66%) of the respondents were from organizations with an annual budget of \$500,000 or more. The Executive Director, senior staff interviewees, and roundtable participants we interviewed are long-serving regional environmental advocacy leaders. Approximately half of the survey respondents who are Executive Directors indicated that they have been in the job for 5+ years. Eighty-two percent (82%) of the Executive Directors responding to the survey indicated that their current position is not their first job in the environmental or conservation field. Most of the senior leaders in the region have been working in conservation and environment for years.

The charts below provide more information about the budget size of survey participants' organizations and the number of years in their current job. Not all survey participants responded to each of these questions accounting for totals less than the total number of survey participants (27).



Notes from the interviews and meetings were summarized and categorized by ICL staff. The themes that emerged were correlated with information from the survey, and the responses to open-ended questions.

INQUIRY and FINDINGS

In the survey, interviews, and roundtable conversations, we asked a mix of questions to surface responses about current thinking about leadership in the environmental advocacy sector in the region, and about what kinds of leadership will be needed most in the future.

Our research covered leadership skills needed and career path issues broadly in Great Lakes organizations working on freshwater issues. In the future, a more narrow focus on particular types of organizations (i.e. rural or suburban, grassroots or region-wide) or areas within the region may surface strategic opportunities for funders, capacity-builders, and organizational leaders to make changes.

In the meantime, we are offering our analysis and set of suggestions for each theme as a jumping off point for further consideration. The suggestions are informed by the data collected and support leadership development at individual, organizational, and sector levels. Many of the issues noted in the report will require long-term, intentional, coordinated strategies by funders, capacity-builders, and organizations.

In the end, our vision is a freshwater sector that achieves results and impact on water quality and quantity in the Great Lakes, supports sustainable and dynamic economic and cultural life, has a leadership pipeline, and offers meaningful and rewarding careers.

Survey. The survey aimed to identify a) leadership strengths of their own organizations and b) problem areas for environmental organizations serving the Great Lakes.

In their own organizations, respondents identified the following leadership skills as high strengths, marked one on a four-point scale:

- Collaborating with other conservation leaders, 67% respondents
- Communicating and engaging effectively in communities, 54%
- Focusing on strategy, planning, alignment, and impact, 54%
- Pursuing and delivering innovation, 52%.

The highest-ranking problem areas for environmental organizations serving the Great Lakes, according to the leaders themselves were:

- Collaborating with leaders in other sectors (e.g. culture, social services, business, technology, government), 36% respondents
- Building diverse and inclusive organizations, 33%
- Pursuing and delivering innovation, 25%
- Generating resources and fundraising, 24%.

Responding to the open-ended question, “Over the next decade, what is one important leadership skill or perspective that will be needed from environmental and conservation leaders in the Great Lakes?” respondents gave answers that could be grouped into the following categories (some answers fell into more than one category):

- Community engagement, 33% respondents
- Political and advocacy skills, 33%
- Cooperation across sectors, 29%
- Collaboration, 17 %
- Culture/inclusiveness, 12.5%
- Communications, 12.5%
- Career path, 4%
- Fundraising, 4%

Roundtables. Two leadership roundtables were facilitated as informal conversations about some of the concepts and common responses as they were emerging from interviews, literature review, and survey. Themes that emerged from these discussions were incorporated into our analysis. Topics included *experiences that influenced your leadership, effective practices around organizational and leadership development, collaboration, skill support needs, changes and issues for advocacy organizations, diversity, and innovation.*

Literature review and research. Practitioner papers and articles on leadership and succession were reviewed, as were leadership programs and organizations, with emphasis on perspectives related to environmental groups and the North American nonprofit sector. Selected documents are cited at the end of this report.

Interviews. Individuals were interviewed to add depth and understanding to the inquiry. Questions for each category of interviewees were similar but tailored. The chart on the following page lists the questions.

Executive Directors	Senior Staff and Program Managers	Regional and National Subject Experts
For your organization, what is the one significant challenge or opportunity on the horizon?		What are some of the key future challenges for leaders, in the Great Lakes region, specifically in conservation, and/or broadly for the nonprofit sector?
What leadership skills and perspectives will your organization need most as it evolves?	In the next five years, for your organization to continue to be effective, what leadership skills do your executive leaders need?	
What are some specific ways your organization supports incoming staff and executives, and/or provides opportunities for professional development and growth?		What are specific ways organizations can support incoming staff and executives? Provide opportunities for professional development and growth?
How would you describe diversity and/or inclusiveness in your staff team currently? How does your organization think about, talk about, or frame diversity?		How do you think about, talk about, or frame diversity and/or inclusiveness? How important is the issue of managing intergenerational teams?
Over the next decade, what leadership skills and perspectives will the environmental and conservation sector in the Great Lakes need most?		
What else is important or what else are you thinking about these days related to leadership on environmental challenges in the Great Lakes region, now and into the future?	<p>What is the next level position for you in your career path?</p> <p>Is there a path to that position and if so, what is the path?</p> <p>What supports you getting to the next level? If there are any barriers, what are they?</p> <p>What kinds of professional development support would help enrich your performance and prepare you for the next stage in your career?</p>	

LEADERSHIP THEMES

Six themes emerged from the research, three focused on leadership skills and three on careers and leadership opportunities.

The table below categorizes the themes that emerged from the research and our interpretation of the implications for critical leadership skills needed.

Themes	Conservation and Environmental Organizations Need Leaders Who:
1. Community-Connected Advocacy	<ul style="list-style-type: none">▪ Develop a compelling vision and shared strategies▪ Listen to and engage their communities
2. Strategic Collaboration	<ul style="list-style-type: none">▪ Collaborate strategically▪ Engage multiple sectors
3. Effective Organizations	<ul style="list-style-type: none">▪ Manage their nonprofit effectively▪ Lead organizational change and growth▪ Create an organizational culture of strategy, alignment, and innovation
4. Diversity and Inclusion	<ul style="list-style-type: none">▪ Build organizations that attract and retain a diverse workforce▪ Create organizations that are relevant to- and inclusive of-the community they serve
5. Environmental and Conservation Career Path	<ul style="list-style-type: none">▪ Create meaningful employment and career opportunities▪ Attract and retain diverse talent in a competitive and changing marketplace
6. Executive Succession and Transition	<ul style="list-style-type: none">▪ Plan and prepare for succession and transition for their organizations and for themselves▪ Manage and mitigate burnout

ANALYSIS and RECOMMENDATIONS

1. Community-Connected Advocacy

When asked “Over the next decade, what is one important leadership skill or perspective that will be needed from environmental and conservation leaders in the Great Lakes?” thirty-three percent (33%) of survey respondents referenced political and advocacy concerns. They mentioned *advocacy challenges, climate change, demographic changes, technological advances, money in politics, local plus global realities, and complex problems*. Some foresee that their long-standing approaches to issue advocacy and organization may need to evolve.

Problems are only getting more complicated. Easy technical and political solutions are harder to grasp. Successful leaders will be the ones who can both readily grasp the real economic and social drivers of our advocacy targets, and who are willing to shape tactics to address those drivers.

Functioning in more partisan environment. Realism and compromise.

—Respondents, Great Lakes Freshwater Leadership Survey, June 2015

1.1. Leaders who develop a compelling vision and shared strategies

Navigating increasing complexity of issues in changing circumstances calls for leaders with strong advocacy, strategy, and communications skills.

We are going to need persuasive leaders who can articulate a clear vision for the region. One that is inclusive, not divisive, and creates a sense of urgency. A leader who can translate actions across the many actors and populations in the Great Lakes.

—Respondent, Great Lakes Freshwater Leadership Survey, June 2015

Interviewees referred to their shared history of successful collaboration in the Great Lakes, particularly in restoration and regional advocacy efforts over the last decade. As they look ahead, they wonder: What is the next big, shared campaign? What kind of region-wide leadership will it take to get the outcomes needed?

Both a challenge and an opportunity is creating a new Great Lakes network. Over the next five years, the challenge will be managing policy change against shrinking government. We'll need to maintain the protections [gained] without the funding from the government. — Jill Ryan, Freshwater Future

Going forward, leaders will need to manage complexity and engage a broader set of allies. At least six out of the seven Executive Directors interviewed remarked in one way or another that the region's leaders will need to discern the most meaningful, relevant, and compelling next regional issue campaign or network. Leaders will need to be engaged authentically in communities, understanding the existing activity for economic development, public health, food systems, and more. They will need to work with leaders in multiple sectors using communications strategies that connect with people.

Setting the agenda for the future. We've had a really successful history in the region working on Great Lakes restoration through the Healing Our Waters coalition. We are asking, okay, so what's next? — Molly Flanagan, Alliance for the Great Lakes

Number one leadership challenge: to identify the real key issues that need to be addressed. In the Great Lakes, we have so many issues, which makes choosing the top priority issue difficult. — David Ullrich, Great Lakes and St. Lawrence Cities Initiative

We need to look at issues people are concerned about. Finding balance between what is needed and what is wanted. Climate change will have a huge effect in our region. Transitioning from a fossil fuel economy to a clean energy economy. —Chris Kolb, Michigan Environmental Council

There needs to be more actions and activities that engage the public. Giving the public a voice and inspiration will result in them becoming more active. People do care...they might not feel empowered and we need to empower people to make change. We are not doing enough right now. — Adrienne Esposito, Citizens Campaign for the Environment.

Because of the vast geography of the region, with leaders in cities and towns far from each other in multiple states and two countries, developing regional strategies that are relevant to people in their many communities is not easy. The challenge of doing so effectively in the future connects and overlaps with issues of relevance, diversity and inclusion, and innovation.

I'm not sure we have understood the social science as well as we should have. The scientists, engineers, and technical experts have dominated the strategies. — David Ullrich, Great Lakes St. Lawrence Cities Initiative

Communication and engagement approaches may have to evolve.

A significant challenge for us is [finding] new and innovative ways to engage the public. We've always been good at this the old-fashioned way (canvassers) and have amped up our social media, but we want to take it to the next level. We always need to be cutting edge, informing the public and getting them to act. Change only happens when people speak up and show up. —Adrienne Esposito, Citizens Campaign for the Environment

Independent Sector, a national coalition of charities, foundations, and corporate giving programs, believes that the *dominant culture of leadership will continue to gradually shift from central control towards broad episodic engagement, being adaptive, facilitative, transparent, and inspirational will be increasingly valued.* Independent Sector has incorporated this belief or assumption into its future strategy and anticipates that over the next 20 years individuals will “swarm” in loose networks around shared civic or political purpose, at times sidestepping organizations that are not flexible and equipped to engage with them. If the organization’s assumption about the context for pursuing social impact is correct, freshwater advocacy organizations may have to adapt how they operate and engage advocates, generating new opportunities to achieve results.

1.2. Leaders who listen to and engage their communities

Developing a meaningful, magnetic vision and effective strategies will depend on connecting, communicating, and engaging broader participation, beyond those who have supported environmental causes traditionally.

The environmental movement has not historically been rooted in the needs of people, but on protecting places, landscapes, and habitats. It has not been a direct relationship with people in their own neighborhoods and in the parks. It's a challenge for us in expanding the circle of people with whom we work. – Molly Flanagan, Alliance for the Great Lakes

People of color support environmental protection at a higher rate than whites. However, environmental organizations are not adequately reaching out to organizations representing people of color. — The State of Diversity in Environmental Organizations, 2014 (Green 2.0 report)

In order to make the changes advocates seek, participation with leaders in low-income communities and communities of color, as well as the environmental movement's traditional supporters, will be important to achieving that change. Success will occur when we join with others rather than simply urging others to join us.

Our thinking is evolving right now. We're asking ourselves, "What does the organization value at its core? Is our identity in the place? Do we want to put the place above the people who live there? Or is it our job to nurture the people in equal measure?" — Joel Brammeier, Alliance for the Great Lakes

There may be a divide in approach between a traditional advocacy orientation, which can be experienced as adversarial and one-sided, and a collaborative or collective orientation, which can feel exhausting and unfocused. At ICL, we describe this difference in orientation as "join me" vs. "join you." Acknowledging the goals and focus on adding advocates and changing policy, it may not be possible or perhaps wise to call for total culture change. However, leaders in the future will have to manage this tension between directing action and facilitating it well.

Community-Connected Recommendations

- Develop new approaches, tools, and capacities among staff and board members for advocacy efforts that use collaborative approaches and technology-driven solutions.
- Support and fund directly the full range of nonprofit organizations leading and affected by freshwater issues.
- Look for opportunities to solve complex issues through long-term approaches that use vision and strategy sessions that engage a full mix of community stakeholders.

2. Strategic Collaboration

The experience of freshwater advocacy in the Great Lakes includes years of cooperation, collaboration, and networks among environmental nonprofit professionals and funders. However, collaboration with peers and professionals in other sectors is not as developed.

Survey respondents cited “collaborating *with other conservation leaders*” as the greatest strength (67% and ranked highest of all leadership skills). They ranked “collaborating *with leaders in other sectors (e.g. culture, social services, business, technology, government)*” as a medium strength for the environmental organizations serving the Great Lakes. They see collaboration with leaders in other sectors as a serious problem (36.36%) or medium-level problem (55%) for the region.

2.1. Leaders who are skilled in strategic collaboration

Freshwater sector leaders view continued regional collaboration among conservation and environmental groups in the Great Lakes to be a given now and into the future. They believe collaboration and network strategies to be time-intensive and inherently challenging, but accept their value.

Collaboration is challenging...what happens before strategy and tactics related to a policy or a grant—learning networks, trust, and relationships—is very important....Leaders need to listen to everybody and to negotiate differences....And there are often power issues between large and small groups....We also need leaders who can keep everyone engaged and involved between issues or campaigns. — Toronto Meeting Discussion Notes, June 2015

We’re finding one of the most effective ways to make change is in smaller coalitions in a region. – Adrienne Esposito, Citizens Campaign for the Environment

From ICL’s work with coalitions and networks around the country, we know that strategic collaboration requires a complementary set of skills and practices to those that leaders use in their organizations. In our publication, *The Less Visible Leader*, we identified 12 practices from leaders’ stories and examples of effective collaboration. Among other skills, they must be adept at “leading from the side,” flexible at building an infrastructure that supports the coalition’s vision and goals, and embrace ambiguity in the face of multiple commitments, limited resources, and an array of network member needs.

In the course of our research, some leaders referred to the importance of pursuing collaboration strategically. Some noted that collaboration can take a disproportionate amount of time and resources in relation to the benefits. For example, at the Chicago meeting, one participant noted that:

[The idea that] “we must collaborate” is backwards. The [real] question should be how do we win more? Collaboration can be one strategy. At times, there is too much collaboration. It sucks huge amounts of resources and then other important issues do not receive the attention they need. — Notes from leadership roundtable conversation in Chicago

2.2. Leaders who engage multiple sectors

Responding to the open-ended question, “Over the next decade, what is one important leadership skill or perspective that will be needed from environmental and conservation leaders in the Great Lakes?” Of the survey responses, 33% referenced engaging leaders in the relevant geographic communities and 29% mentioned working with peers in other sectors and geographies.

To have greater impact and relevancy going forward, leaders want to broaden their scope of partners and work. This requires skillfully and sensitively working across sector and political boundaries. Many are thinking more broadly and creatively about working with leaders from health, agriculture, business, community organizations, and local government.

[Leaders will need] the ability to effectively engage all sectors of society - industry, government, lower income, etc. - who share the use of or otherwise are dependent on the Great Lakes St. Lawrence system in the discussion and implementation of freshwater policies.

To be able to bring more diverse stakeholders to the table

Being able to engage others outside of the conservation community, the non-environmental community.

Collaboration across borders and states

Effective community engagement, creative collaborations and increased funding/resources

Be solutions-based with the private sector

– Respondents, Great Lakes Freshwater Leadership Survey, June 2015

Freshwater leaders spoke about being perceived as not relevant to people in the communities affected. This poses risks to creating constituency support for policy change and impact. Leaders see this kind of networking and engagement as requiring a different approach from traditional and time-tested advocacy practices. One survey respondent wrote: *The ability to transcend differences, to explore and identify creative solutions with people perceived as adversaries.* Leaders need to communicate with community leaders, within expanded networks, across difference.

It's not enough to be just opportunistic...we need to look for allies such as those in public health who share our values and meaningfully engage with them and partner. — Mark Redsten, Clean Wisconsin

It's important to be intentional about what you are building. The environmental sector is closed and insular. This relates to bench strength in the community and it relates to lack of effectiveness. — Notes from leadership roundtable conversation in Chicago

A number of leaders mentioned the need to work more intentionally and effectively with business. While in some cases business and technology interests lead policy change, there is also an opportunity to create space for innovative approaches and to learn from business' innovation.

How do we do a better job of working with business sector in the future will be a top priority. — Chris Kolb, Michigan Environmental Council

As problems get more complex, there is a risk of business taking the lead and reducing the role of government and NGOs. But it's not about fighting business. Innovation is coming more often from the business, design, and technology fields rather than from the environmental and conservation sector. —Joel Brammeier, Alliance for the Great Lakes

Their reflections resonate in another future assumption from Independent Sector about the context for pursuing social impact: *Many businesses are becoming increasingly engaged in social and environmental issues.* They see business as a partner in addressing social challenges here and around the world. In addition, motivated by market pressure, business will use cross-sector and cross-cultural initiatives in these partnerships. Nonprofit sector leaders will have opportunities to play a bridge role, discerning when to collaborate, when to endorse, or when to oppose these initiatives.

Strategic Collaboration Recommendations

- Support training and coaching that builds collaborative leadership skills, awareness, and practice.
- Weave skill development into existing collaborative entities, especially those that emerge and that are organized around a mix of regional, multisector interests, and/or issues and geographies.
- Develop multi-sector leadership cohort programs that include building collaborative leadership skills and create opportunities to connect with, learn from, and develop relationships with business and peers from other sectors.
- Engage place-based with regional and national funders in region-wide leadership development, organizational development, and advocacy impact.
- Involve board members through programming, leadership skill-building, and planning processes that examines collaborative approaches and cross-sector partnerships.

3. Effective Organizations

In addition to collaboration, networking, and advocacy skills, leaders named a host of management and organization development skills needed for effective leadership in the Great Lakes into the future. Leaders are interested in improving management within their teams, as well as in strengthening their organizations' capacity and culture.

3.1. Leaders who are effective nonprofit managers

In response to the open survey question *If your organization were to receive an unexpected \$30,000 for capacity building or leadership development, how would you proposed to invest it this year*, fifty percent (50%) indicated that they would like to invest in staff support (17% for senior staff, 8% for emerging and early-stage staff, 25% for whole staff). Interviewees and survey participants named a range of specific organizational capacity-building and management development supports (tools, training, coaching, strategy, and cohorts).

Forty-five percent (45%) of Executive Directors indicated that they would like to use capacity-building or leadership support dollars to build organizational skills, such as management and fundraising. Their specific answers included:

Would love to have the money to invest in my leaders for training/retreats/coaching, which invests in their interests in professional and personal growth and learning.

Overall support for staff - ensuring the organization will be sustained and they will have jobs to come to - is also the ultimate in personal and professional confidence and provides the space for the staff to take in opportunities for professional and personal growth.

We would use this to train and empower our board and staff to be a better team. Specifically, we would better develop our ability to conduct individual donor fundraising, improve strategic communications, improve rapid response to urgent issues, and incorporate diversity, equity, and inclusion into our operations.

Improving project management skills. Management for non-managers.

To create a strategic fundraising plan or facilitate dialogue between generations on environmental issues and diverse approaches

– Respondents, Great Lakes Freshwater Leadership Survey, June 2015

In interviews, leaders mentioned professional development practices to improve management skills that are already in place in many of their organizations, including:

- Budgeting \$1000-\$2000 per employee per year for professional development of their own choosing
- Integrating leadership development into volunteer organizing
- Making “stretch” assignments to staff to encourage learning
- Participating in cohort programs, such as Institute for Conservation Leadership’s Executive Leadership Program and Leading from Within
- Receiving coaching
- Attending conferences, training, and workshops
- Participating in structured and unstructured peer mentoring and networking.

Some interviewees recommended creating structured networking opportunities for incoming and new staff. They suggested that facilitators may be needed to help make peer learning happen intentionally.

Cost and accessibility may be barriers to making staff leadership development a priority. Survey respondents mentioned that summer institutes, college programs, and national programs are limited in number. Several are not accessible to smaller nonprofit organizations.

Practical creativity and skilled management can make up some of the difference. Washington, DC-based human resources consultant Pratchi Shah says that professional development does not have to cost a fortune and, at least to some degree, can be integrated into work plans. She says, “*Some of the best development is with increased or special responsibilities. And in the nonprofit sector, we never run out of work.*”

3.2. Leaders who lead organizational change and growth

Most respondents consider managing organizational change and growth both a medium-level strength for their organizations and a medium-level problem/challenge for the region (ranked at two on a four-point scale).

In addition to seeing needs for strengthening management skills, some leaders are interested in building integrated or comprehensive change and scaling their work. To the survey question about how they might use a discrete amount of unexpected funding for leadership and capacity building, answers included:

I would use it to support my entire senior management team in intensive change management and staff mentoring/coaching training, likely using executive training from business schools.

To develop tools that activate staff in transitioning from a task-oriented mindset to an impact-oriented attitude.

Tools to create a way for all staff to feel that they can be leaders within and outside of the organization.

– Respondents, Great Lakes Freshwater Leadership Survey, June 2015

Participants in the Toronto conversation mentioned a range of promising activities for leaders to try in their organizations:

- *Integrating leadership development into volunteer organizing*
- *Forming a leadership team for new managers, replicating model internship programs of larger organizations that match people with leaders (such as Sierra Club's youth wing)*
- *Encouraging participation in other student and young professionals networks (such as Canadian Water Network's committee, workshops, and events) and*
- *Creating team structures on staff similar to volunteer structures to work on projects with a beginning, middle, and an end.*

3.3. Leaders who can create an organizational culture of strategy, alignment, and innovation

When leaders were asked, “*If you could change one thing about the culture of your organization, what would it be,*” leaders gave specific answers that touched on a range of topics. Twenty-five percent (25%) of the responses mentioned issues of strategy and alignment such as:

I would like us to have the capacity to do longer-term thinking, planning, strategizing. We can't find the money or time to do that even though we know it's important.

Quality over quantity. Doing fewer various projects/events/programs to do what we do better quality. Internal organization silo-busting so staff works together to support an annual plan and projects rather than busily working individually all on different things.

Greater ambition. Better long-term planning. Focus and follow through.

If I could get everyone perfectly on board, understanding that every action he or she takes has to be strategically aligned within the organization, that would be it.

– Respondents, Great Lakes Freshwater Leadership Survey, June 2015

In the survey, 87% of the leaders ranked “pursuing and delivering innovation” as a strength or medium strength and ranked the same skill as a medium-level problem for the region (55%).

The Toronto group conversation identified the need for conservation advocacy groups to build innovation into organizational culture. Some mentioned looking to the business community as a model for continuous reinvention in response to trends.

Others noted the value of informal peer exchange and cross-sector interaction to innovation:

I have always found that the most meaningful change and improvement comes through exposure to unlikely partners, unusual connections – where cross-pollination of ideas, approaches, and personalities can allow for less constrained ways of thinking, of leading. Leaders need space to listen to one another and learn from actual experiences, situations.
— Terry Rees, Federation of Ontario Cottagers' Associations

Creativity and the ability to innovate are critical. — Jill Ryan, Freshwater Future

Effective Organizations Recommendations

- Increase access and use of leadership workshops and training, especially those that increase adaptive leadership capacities and innovative approaches, including those serving other sectors.
- Offer intensive advanced leadership training in systems thinking and collaboration.
- Provide training and coaching to leaders and teams within organizations in how to offer “stretch” responsibilities and how to provide feedback.
- Encourage the field to learn from current summer internship and professional development efforts, and build stronger and perhaps collaborative programs.
- Encourage leaders to participate in activities organized on unfamiliar topics and in intra-sector networking; provide structured learning opportunities for leaders to step into new cultural settings, new disciplines, and new sector settings and reflect on their new learnings.

4. Diversity and Inclusion

Many respondents and interviewees expressed interest in and concern about the level of diversity in their organizations and the low percentages of people of color on their staff, board, and in their membership. Leaders acknowledge and are concerned about the lack of racial diversity in staff, boards, volunteers, but generally seem at a loss about what to do.

4.1. Leaders who build organizations that attract and retain a diverse workforce

In at least some organizations, there exists a range of active tension and awareness around issues related to diversity. Forty-two percent (42%) of survey respondents considered “Building diverse and inclusive organizations” a low strength in their own organizations, while 38% ranked it a medium strength, and 21% ranked it a high strength.

One leader told us, “*There is controversy on our board and an active debate in our organization*” about whether it is an important issue for conservation objectives. Others, on the other hand, see it as a key to future success.

Leaders who can cultivate top-to-bottom inclusive environments in both people and program content will be sought after and successful.
—Respondent, Great Lakes Freshwater Leadership Survey, June 2015

There is greater awareness since we have expanded our work in Milwaukee neighborhoods that are more racially diverse. This is an evolution for us and part of our strategic planning process will be to diversify the board of directors.
— Mark Redsten, Clean Wisconsin

Racial Diversity. The lack of racial diversity and inclusion mentioned echoes what is known to be true in the environmental and conservation sector, nationally. In her survey of 191 environmental nonprofits, 74 government environmental agencies, and 28 leading environmental grant makers, University of Michigan School of Natural Resources and Environment professor Dr. Dorceta Taylor showed that “*people of color are 35% of the U.S. population and comprise 29% of the science and engineering workforce but they do not exceed 1% of the staff in any of the organizations surveyed [by the Green 2.0 researchers].*”

In our interviews, five of the seven Executive Directors interviewed mentioned that while they have not succeeded in building racially diverse organizations, their staffs represent other forms of diversity. This awareness of the dimensions of diversity, and the learning that comes with it, can help create capacity. However, this perspective does not take into account the challenges of building racial and ethnic diversity and inclusion.

One thing I see a lot of, and which is problematic, is defining diversity so broadly that it allows people not to deal with the issue of race and racial equity. Around the table you want to have represented the people you serve and engage, so you need them inside advising or otherwise part of the organization. — Paul Schmitz, Leading Inside Out

This dynamic speaks to the need of transforming organizational culture and creating more multi-cultural organizations within the region.

Gender Diversity. Organizations represented in our data collection tend to have diversity in gender. However, that diversity is not represented in larger organizations. ICL also sees this disparity nationally. Men are more likely to head large-staff, statewide and regional organizations/institutions while women are more likely to head small-staff, locally-focused organizations.

According to *The State of Diversity in Environmental Organizations [Green 2.0 project]:* *Institutions have made significant progress on gender diversity, but the gains have mostly gone to white women, and much remains to be done...Men are still more likely than females to occupy the most powerful positions in environmental organizations.* Achieving meaningful diversity and inclusion in organizations calls for leaders to be deliberate and intentional.

4.2. Leaders who create organizations that are relevant to – and inclusive of – the community they serve

Organizational Culture Change. Addressing issues of diversity, equity and inclusion within an organization requires attention, time, resources, planning. It requires intention at all levels of the organization to embrace and be a multi-cultural organization rather than a “mono-culture” organization. In making this shift, the most progress happens when the leadership team of an organization commits and makes a long-term investment in an intentional culture change that supports the organization’s mission success.

Schmitz framed this concept in his interview by saying it is *about a set of actions not just a belief system. The best way to affect and serve is to figure out how to make the leap from caring and thinking about the diversity that the organization serves to the diversity in who is employed at the organization.*

1. *How is the CEO building a bench and how much is the board creating expectations and managing the CEO to build the bench.*
2. *Diversity only happens, and the literature bears this out, when the CEO makes a commitment to it and to making changes in the culture. And performance on diversity goals has to be measurable.*
3. *Implementing best practices and an organizational culture that creates high performing recruitment and retention processes.*

Recruitment Strategies. Based on the current patterns in the community, recruitment practices may need to be updated for Great Lakes organizations in order to meet the demands of a diverse employment marketplace. Strategies used to create diverse candidate pools will be critical in attracting more people of color, individuals representing different generations, and women serving in senior staff roles. Common recruitment challenges cited in a study by Commongood Careers include poor access to diverse networks, interview methods that fail to demonstrate an organization’s commitment to diversity, and rushed hiring processes that do not allow for adequate time to develop diverse candidate pools (The Voice of Nonprofit Talent, 2008). Given the lack of diversity in many organizations working in the region, we see this as a key area to give attention.

Diversity and Inclusion Recommendations:

- Create tools, cohort training, and strategy development frameworks that tie mission and organizational success to diversity, equity, and inclusion strategies.
- Develop/use frameworks and tools for changing organizational culture, updating recruitment practices, and building more inclusive organizations.
- Encourage or develop and support a cohort of regional, state, and local organizations for self-reporting of diversity data as part of the Green 2.0 initiative.
- Fund more organizations led by people of color doing work that could be connected and related to existing freshwater advocacy and conservation work.

5. Environmental and Conservation Career Path

Leaders in the Great Lakes expressed concerns about employment and career paths for professionals in the region. Organizations tend to have small staff sizes, which inherently limits demand for new positions. Staffing is fairly stable at executive and senior levels in freshwater nonprofits in the region. Some leaders, however, see the concerns as an opportunity or a call for significant shifts in how individuals are recruited and supported, and how employment and organizations are structured.

[A challenge the region faces is] how do we systematically create career opportunities for people. There are only so many jobs and opportunities for advancement. – Joel Brammeier, Alliance for the Great Lakes

5.1. Leaders who can build organizations that create meaningful employment and career opportunities

Leaders identified several challenges related to employment in the field, including

- Unclear career path with lateral and criss-crossing career moves
- Lower salaries
- Limited executive-level job opportunities

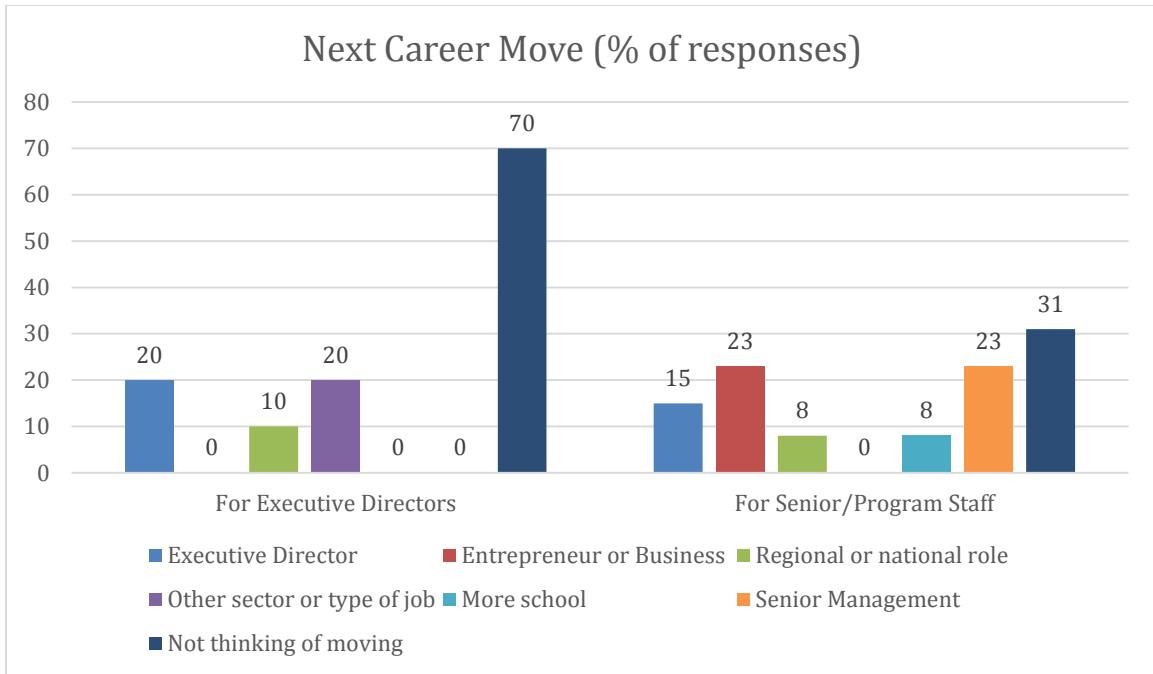
Career path. Overall, organizations did not report having trouble recruiting or retaining staff, at least in part because the number of opportunities is relatively small. Of the organizations surveyed by ICL, the most common staff size is between 4 and 7 staff. Many organizations are structured, as one respondent put it, to rely primarily on senior staff and interns/volunteers. This structure leaves comparatively few opportunities for experienced mid-level professionals.

There needs to be a long view of keeping our talent in the community. There is no path for leaders to start their career in the freshwater field in the region and find continually challenging leadership positions within the field. Some of those upward options are into foundations, but this takes them out of the advocacy community.

—Respondent, Great Lakes Freshwater Leadership Survey, June 2015

Leaders we surveyed and spoke with appear to be making their career in the field, and for the most part plan to stay in their current jobs, with 37.5% respondents in their current jobs between 5 and 10 years. Of the senior and program staff who we interviewed, 31% are not considering a career move. Approximately one-third expect to become an entrepreneur, enter business, or go back to school. Fifteen percent (15%) are interested in an executive director position.

The chart on the following page shows how leaders in the region see their next possible career move.



Salaries. Salary levels were mentioned as a challenge to organizations in the region in some survey responses and in both roundtable conversations. While most leaders (79%) indicated that it is not difficult to recruit or retain program staff, 50% of those who did cited low salaries as the toughest challenge.

Ultimately, we need to pay more, as do most conservation nonprofits, so that our own staff are able to achieve a reasonable quality of life while pursuing what they love.

[The] question is how to build opportunities in organizations and to grow organizations to allow for more opportunities.

– Great Lakes Freshwater Organizations Leadership Survey, June 2015

Salary levels may reflect those in the region’s nonprofit sector generally. Research by Ontario Nonprofit Network in its report *Shaping the Future (2013)* showed that non-competitive salaries and the lack of career mobility/paths were among the top four recruitment and retention challenges for nonprofits in Ontario.

At one of the roundtables, leaders discussed competition with the private sector. In some cases, businesses are able to offer higher salaries, a more diverse workplace, and a workplace that supports innovation. Any of these factors may be more attractive attributes for job-seekers than what is offered by many nonprofit organizations.

Executive positions. Most respondents (77%) said their organizations do not have trouble retaining senior staff.

We have a strong reputation and pay better than most non-profits in the area.

We provide a space for experimentation and growth. That keeps senior staff from feeling like they've plateaued in the organization.

Vibrant work. People love our organization.

Our organization is a leader in conservation, and offers employees projects and growth in conservation.

Small staff [and change in need for recruitment] doesn't happen very often.

We have a great staff and organization that provides good pay and benefits and values the expertise of these staff.

—Respondents, Great Lakes Freshwater Leadership Survey, June 2015

5.2. Leaders who can build organizations that attract and retain diverse talent in a competitive and changing marketplace

Leaders who indicated that their organizations have problems attracting and keeping senior executives, cited a rural location, burnout, and fast pace combined with low salaries.

Associate and senior-level staff indicated that they want to continue to learn and grow in their careers. Some see themselves as not ready to step in as Executive Director and others indicated not wanting that role. Interviewees expressed concern about the small number of openings and competition for those openings. Some are content to stay where they are, while others may be more open to opportunities that come up.

Environmental and Conservation Career Path Recommendations

- Expand and develop professional cohort programs such as ICL's Leading from Within and Executive Leadership Program or create new programs for senior staff to support them and their capacity to support career development for staff in their organizations.
- Continue funding participation in cohort leadership programs, such as ICL's Leading from Within and Executive Leadership Program, the Environmental Leadership Program's Fellows Program, and the Kinship Conservation Fellows Program.
- Create resources, training, and coaching on recruitment practices to respond to workforce expectations and needs.
- Create clearer ways to connect with and build upon existing web portals for jobs, career, and networking opportunities.

6. Executive Succession and Transition

Freshwater organization executive directors in the region have, for the most part, and especially in the larger organizations, been in their jobs for a long time. Half of the Executive Directors the ICL survey reported having been in their job for five to nine years. Seventy percent report that they are not thinking of moving, and according to our survey it is not difficult to recruit/retain senior management.

One executive director in the region described the current set of executives as a “short list of overburdened sector leaders.” Another executive director responding in the survey warned, “*Leadership for conservation action in this region is going to face an absolute crisis within the next five or so years with many leaders facing the same stage of retirement.*”

6.1. Leaders who plan and prepare for succession and transition for their organizations and for themselves

Two-thirds of respondents in the survey rated planning for executive transition as a low strength (58%) or not a strength (8%) for their own organizations. Freshwater leaders in the Great Lakes expressed concerns that organizations risk losing the institutional history and long-standing relationships when long-time leaders step down and yet risk stagnation if they do not. This finding mirrors ICL’s experience that nationally, many boards and executive directors have not built systems and practices that prepare the organization for a leadership transition.

A 2012 national survey of long-term nonprofit leaders age 55+ conducted by the Building Movement Project, Civic Ventures, and Clohesy Consulting found that 95% of these leaders *reject the traditional “golden years” vision of retiring from work to a life of leisure.* Most (67%) envision life after midlife as “the beginning of a new chapter” and expect to be active and involved in paid or volunteer roles, starting new activities, and using their skills and experience to help others. They are twice as likely as similarly-aged adults in the general population to embrace this “encore vision” of their next stage of life. (Frances Kunreuther, et. al., *The New Lifecycle of Work: Long-term Nonprofit Leaders Prepare for Their Future*).

Executives and seniors staff in the organizations we researched tend to stay put. When asked the open question, *What do you see as a possible next career move for you?*, thirty-five percent (35%) of all respondents indicated that they were not thinking of moving to a new career.

There aren't really many options for upward mobility besides foundations, I plan to stay here for a long time. I am focused on moving my current organization into a better, sustainable position. Once that seems secure, I might consider a position in an organization with a more basin-wide perspective.

—Respondent, *Great Lakes Freshwater Leadership Survey, June 2015*

Literature on the subject of executive succession and transition suggests that long-term leaders, in particular, need skilled and sensitive support in the decision-making and planning for transition (long-term or short-term) for themselves. Executive directors can be reluctant to bring up succession planning with their boards and vice versa. Organizations need strategies in place for supporting executives as well as assistance for leaders who are ready to retire or to move on to another executive role or to other meaningful work that uses their skills and networks with less responsibility and/or flexibility.

Leaders in the future will need tools and skilled coaches to help them consider how to create an effective transition for themselves and their organizations and how to leave behind a culture of organizational resiliency. Long-standing executive directors may need help imagining their identity separate from the organization, while exploring creative options for next steps, such as a similar or growth position, consulting, teaching, or writing projects.

Leaders who address leadership transition along with organizational development are on the right track according to a new study released in June by Third Sector New England, which recommends working from a frame of deep sustainability rather than succession planning alone.

Nonprofit Sector Quarterly editor Ruth McCambridge writes:

We have a responsibility to build a greater shared understanding about what it takes to be, as these authors state it, a “deeply sustainable” nonprofit. That work cannot be done by focusing on the presence or absence of one leader, but must center on the creation of capital, adequate infrastructure, deep pools of active leadership capable of optimizing the opportunities and work of the organization, and a great governance system that makes best use of the generative capacities around the organization.

6.2. Leaders who manage and mitigate burnout

Two challenges to recruitment in general as well as at the executive director level, are the small staff size of most organizations and the daunting perceptions of the job. In particular, perceptions — and perhaps the reality — of workload and pace is a challenge for leaders and staff. Half of the survey respondents (50%) cited managing leader and staff burnout as a low strength.

In an open-ended question, *If you could change one thing about the culture of your organization, what would it be?*, roughly 15% of the answers referred to workload and pace. Examples of responses include:

Ability to slow down the pace so that we aren't always chasing projects, grants, donors, partners, press, etc.

Establish dedicated staff to provide on-going organization-wide support and expertise in areas like contact management database, website, technology, office management or HR instead of tacking it onto various program managers which results in silos and efficiency issues.

Stronger life/work balance. Do what we do but better

–Respondents, Great Lakes Freshwater Leadership Survey, June 2015

Restructuring positions through shared services (especially in smaller organizations), strengthening supports to executives, and creating flexible work environments, may provide some relief, Formal and informal peer learning and support circles can also help. Terry Rees, Federation of Ontario Cottagers' Associations, shared his experience in organizing an executive director "therapy" group. His informal, mostly social group meets occasionally *"to shoot the breeze and air some grievances, discuss our shared challenges...that are particular to the "Executive Director / General Manager" experience."*

Executive Succession and Transition Recommendations

- Provide professional support and frameworks for organizational leaders and boards connecting organizational capacity-building with leadership development.
- Initiate a regional working group on conservation careers, succession, and pipeline development for freshwater and future leadership in the Great Lakes.
- Offer tailored supports such as coaching, peer planning retreats to senior and long-time executives for professional development, long-term transition planning, including sabbaticals, research/writing projects, career and avocation planning, or financial planning.
- Help executive directors build an internal bench, through grooming staff, providing cross-training, and/or taking a sabbatical.
- Create a lifelong leadership fellowship to provide transition and succession assistance to late-stage executives, which could include organizational and personal planning, sabbaticals and/or mini-grants to plan or start encore, or transition, projects.
- Build individual professional development for every staffer into the annual operating budget.

CONCLUSION

This report outlines six key themes that we believe are critical to building leadership in freshwater organizations in the Great Lakes:

1. Community-Connected Advocacy
2. Strategic Collaboration
3. Effective Organizations
4. Diversity and Inclusion
5. Environmental and Conservation Career Path
6. Executive Success and Transition

These six themes are interconnected. Many leaders and their organizations are actively engaged in thinking about and taking steps to address the opportunities and challenges they present for the long-term success in protecting the freshwater resource of the Great Lakes.

Going forward, it will be important for leaders to continue managing increasing complexity and to engage a broader set of allies. At the same time, they will need the skills and resources to strengthen their organizations as they manage change, both internal and external, and to attract and retain a diverse and multi-talented staff.

ICL has identified a variety of skills and capacities related to the themes that can be addressed at multiple levels of the system—by individual leaders, by organizations, by funders, by capacity-builders, and by collaborative efforts across the entire environmental and conservation community in the Great Lakes region. We know we will be able to use the information presented in this report to engage the whole community in dialogue, planning, and action.

ICL can play a leading role in this ongoing conversation by collaborating with foundations, other capacity builders, and by creating programs that address these needs. We are excited about the possibilities for increased impact through a region-wide, cross-sector, collaborative leadership development initiative that combines many of the ideas in this report. Based on our experience, we know that such an initiative can spur transformative change for organizations—to have more impact, and to be a model to others in the region and nationally.

LEADERS INTERVIEWED OR ATTENDING A ROUNDTABLE

Ann Baughman, Freshwater Futures

Joel Brammeier Alliance for the Great Lakes

Paul Bubelis, Sustainability Network

Mike Carlson, Gathering Waters Conservancy

Nicola Crawhall, Great Lakes/St. Lawrence Cities Initiative

Adrienne Esposito, Citizens Campaign for a Clean Environment

Molly Flanagan, Alliance for the Great Lakes

Nancy Goucher, Environmental Defence Canada

Cheryl Kallio, Freshwater Future

Chris Kolb, Michigan Environmental Council

Howard Learner, Environmental Law & Policy Center

Kristy Meyer, Ohio Environmental Council

Liat Podolsky, EcoJustice

Jean Pogge, Delta Institute

David Rankin, Great Lakes Protection Fund

Mark Redsten, Clean Wisconsin

Terry Rees, Association of Ontario Cottagers

Jill Ryan, Freshwater Future

Stephanie Smith, Alliance for the Great Lakes

Lindsay Telfer, Freshwater Alliance

David Ullrich, Great Lakes & St. Lawrence Cities Initiative

Jumana Vasi, Program Officer, Environment Staff, Charles Stewart Mott Foundation

April Wepler, Freshwater Future

LEADERSHIP AND NONPROFIT SECTOR INTERVIEWEES

Errol Mazursky, Environmental Leadership Program

Shirley Sagawa, Center for American Progress

Paul Schmitz, Leading Inside Out

Pratichi Shah, Flourish Talent Management Solutions

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