



# Navigating Leadership Transition

## *Smooth Sailing or Sinking Ship?*



# Your Captains for Today's Voyage



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# Charting the Course *AHOY* Matey!

AHP ANNUAL  
**International**  
CONFERENCE





# Bozeman Health Foundation Bozeman, Montana



# Full Steam Ahead

- Board of Directors
- Staff
- Donors
- Community
- C-Suite

*Maintaining trust through consistent and transparent communication was critical.*

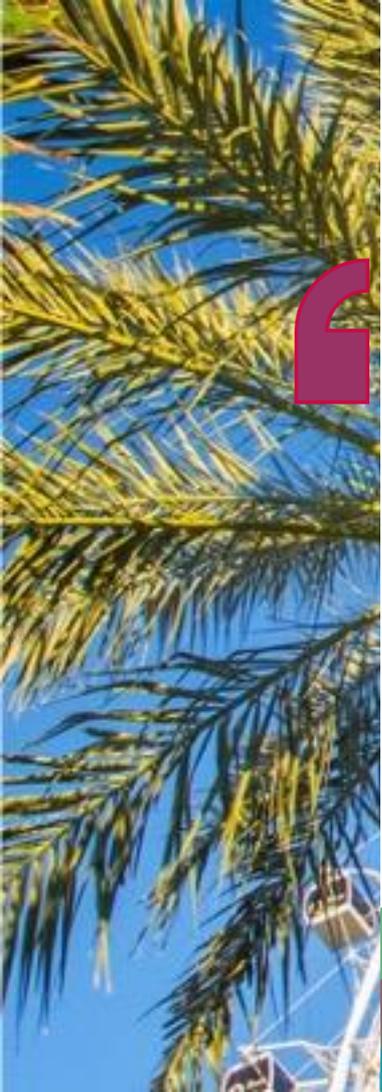


# Stormy Seas

- Interim syndrome
- Shoestring staff
- System-wide layoffs
- Gap in connectivity/alignment
- Communications challenges
- Board fatigue



A smooth sea never made a  
skilled sailor”  
- *Franklin D. Roosevelt*



Park Nicollet Health Foundation  
St. Louis Park, MN





# Casting off the Lines

## **Internal**

- Goals
- Plans and timelines
- Interim Leadership
- Key Information

## **Personal**

- Values Based
- Pledges
- Relationships

## **Audiences**

- Board
- Donor
- Leaders / Partners
- Volunteers
- Community

# Interim Leader Approach

## Collaborative Leadership Team Model



## Structure and Rules of Engagement

- Identify leads and 1 primary lead (HR reasons)
- Define scope of each lead
- Set goals: “maintain plans and relationships, postpone new, retain team and board members...”
- Determine decision making process
- Communicate and build consensus
- Consistency: standing meetings
- Document: agenda/minutes
- Revisit change management



Interim Leader Approach

Collaborative  
Leadership Team Structure

# Departure Timeline

- Internal planning “Quiet phase”
- Communication Plan: Phase 1
- Planning for CLT rollout
- Personal statement
- Launch CLT model
- Communication Plan: Phase 2
- In-person meetings and calls
- Transition notes
- CLT team meetings
- Communications continue
- CLT and team meetings
- Be present and available
- Host a gathering
- Be available for questions and advice

JUNE

JULY

AUG

SEPT

OCT

NOV

- Complete key items (budget, calendars, annual plan)
- Information paths
- Gratitude notes, calls and meetings
- Fulfill personal pledges

- Take a breather
- Celebrate
- Reflect
- Thank you notes

Future: congrats to new hire and avail. for questions and advice



# Preparing for Duty

## **Internal**

- Goals
- Plans and timelines
- Key messaging
- Leadership transition
- Priority relationships
- Key Information

## **Audiences**

- Board
- Donor
- Leaders / Partners
- Volunteers
- Community

## **Personal**

- Warm welcome
- Values based

# Arrival Timeline





# Taking on Water

- System board chair departure
- CEO departure
- Re-brand
- Relocation

**B** Bozeman Health  
FOUNDATION

2023  
*Hospitality*  
gala

Join us to celebrate and recognize  
our silver anniversary with an  
evening to support our community



# Re-Commissioning the Ship



A ship in the harbor is safe,  
but that's not what ships are  
built for.”

- *John A. Shedd*



# Land Ho!

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