CALDWELL

Leading Through Change

A Framework for Leadership Transformation in Community Action

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Community Action has a birthday. What is the actual date?

- January 8, 1964
- August 20, 1964
- October 7, 1964

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- **August 20, 1964**
- October 7, 1964

Community Action has a birthday. What is the actual date?

- January 8, 1964 – **State of the Union, in which Johnson declared war on poverty.**
- **August 20, 1964 – Johnson signs the Economic Opportunity Act.**
- October 7, 1964 – **Appropriations approved.**

BONUS QUESTION

How much money was actually authorized for the first year's antipoverty activities?

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- $947.5 Million – Approved
- $800 Million – Appropriated
- $300 Million – Went specifically to Community Action

80%

WHERE THIS STARTS

80%

of the agency's leadership was retirement-eligible within five years.

WHERE THAT NUMBER CAME FROM

Panhandle Community Services.

150 employees

Texas Panhandle

Nobody set out to find this.

It surfaced sideways during a strategic planning process. We were doing an internal capacity assessment and somebody ran the ages.

That is how most agencies find this out. Sideways, by accident, or the hard way when somebody resigns on a Friday.

How many of your directors and managers could retire in the next five years?

Out of how many total?

ROADMAP

What you will discover.

1. Why leadership has to be built, and will not show up on its own
2. What the Organizational Standards require of you, and what they let you off the hook for
3. A leadership program that ran five years at one agency and two at another, with what it produced and what the investment was
4. How the credential pathway fits: CCAP, ROMA Implementer, ROMA Trainer
5. A one-page plan you build before you leave this room

Leadership is not natural.
It is built.

And it does not get built unless somebody decides to build it.

If your bench is thin, that is not bad luck. That is a decision somebody did not make.

Six things about leadership.

1 **Leadership is not natural.**

It must be developed.

2 **Leaders must be intentional about developing other leaders.**

It does not happen on accident.

3 **Leadership is motivating people toward a shared vision.**

Not a title. Not a chart.

4 **Look within before you look outward.**

You cannot develop others until you understand your own strengths and weaknesses.

5 **Values and culture are crucial.**

Weak leaders do not build them and do not protect them.

6 **Progress, not perfection.**

Start. It may be ugly at first, but it's ok…Just start and build from there.

A leadership culture and a management culture.

Management culture	Leadership culture
Decisions wait for the executive director/Supervisor	Managers decide inside their own lane
People are told what	People are told why
Problems escalate up	Problems get solved where they happen
Staff development is what is left out in the budget	Staff development is a line item
The best technician gets promoted	The best developer of people gets promoted
Compliance is the goal	Excellence is the goal

Neither one is about how nice you are. Both are about where decisions get made.

The test: if you were out for a month, do decisions get made, or do they wait?

Who developed you?
What did they actually do?

Be specific. Not the person's title. What they did.

Everybody stand up.

Stay standing if you have a WRITTEN succession plan for your top position.

Not a plan in your head. Written. One that lays out what events initiate the plan, the process of initiation, who succeeds you, etc.

Now stay standing if you have one for your finance director or any of your other key positions.

YOU ARE NOT ALONE, AND THAT IS NOT COMFORT

What the sector looks like.

27%

of organizations report having a written executive succession plan

19%

annual voluntary turnover in the nonprofit workforce, against roughly 12% across all U.S. industries

40%+

of voluntary nonprofit turnover linked to lack of leadership development opportunity as a push factor

< half

of chief executives describe their internal pipeline as strong or adequate

Look at the third one. Most of the people who quit on you were not chased away by money. They left because they could not see a next step.

You are already paying for the absence of a leadership program. You are paying in turnover instead of in training.

BoardSource; Johnson Center for Philanthropy, 2025; Bridgespan

What the Organizational Standards actually say.

	Private nonprofit	Public agency
7.1 Personnel policies	Written, attorney-reviewed, board-approved within 5 years	**Not applicable. Outside the purview of the department.**
7.4 Appraisal of the top position	Governing board conducts annually	Follows local government procedure
7.6 Employee evaluation	Organization has its own policy	Follows local government policy
4.5 Succession plan	Written plan for the CEO/ED, board-approved, covering an unplanned absence of 3 months or less and the process for filling a permanent vacancy	Adheres to local government policies around interim appointments

Almost every lever a private nonprofit ED holds for shaping who works there and who moves up, a county director does not.

CSBG Organizational Standards, Categories 4 and 7. Job descriptions (7.3) and new employee orientation (7.8) follow the same pattern.

THE ONE THAT DOES NOT LET YOU OFF

Standard 7.9

PRIVATE

The organization conducts or makes available staff development and training, including ROMA, on an ongoing basis.

PUBLIC

The department conducts or makes available staff development and training, including ROMA, on an ongoing basis.

Identical.

Nine HR standards. Eight hand a public agency a pass or a deferral. Staff development is the only one where the county cannot cover for you.

And Standard 4.3 requires both public and private agencies to document using a ROMA-certified trainer. The credential conversation is a compliance conversation.

TAKE THIS HOME

So what do you actually do.

If you are a private nonprofit

- Standard 4.5 is on you: written succession plan, board-approved, covering both a short absence and a permanent vacancy
- Your board can and should own bench strength as a governance question
- You control job descriptions, pay bands, and promotion criteria. Use them.

If you are a county department

- You do not control hiring, classification, or pay. Stop trying to fix leadership through those levers.
- You do control 7.9. Build there.
- Get your county's rules in writing: acting appointments, temporary upgrades, tuition and certification reimbursement, training travel
- Ask whether your county already runs a leadership academy you can put people through at no cost to your budget

That last one is worth a phone call on Monday. If your county runs a supervisory academy, you have a free classroom and only need to build the community action piece around it.

Bench Strength Map.

List your key roles. For each one, name a person:

1

Ready now

2

Ready in one to two years

3

No one identified

Then mark every role where the current holder could retire within five years.

Top half of your handout.

The blank column is the finding.

The people in column one **are your plan.**

The people in column two **are your program.**

Column three **is your risk register.**

Usually column one has one or two people in it, and it is the same person listed under three different roles. That is not a successor. That is a single point of failure with a good attitude.

ImpactLaunch.

12

months

Not a retreat.

Not a workshop.

- Monthly, two hours. Same day, on the calendar a year out.
- Coach-facilitated, but the group does the work on each other.
- Every session: leadership training, group discussion, homework.
- Capped at 15 participants.
- Twenty-four hours a year, per person. That is the whole ask.

ImpactLaunch

Powered by CBG

THE PART PEOPLE SKIP

They applied. And not everybody got in.

APPLICATION QUESTIONS

- Why do you want to be part of this program?
- What do you expect as an outcome?
- How do you feel about this agency and the work it does?
- How do you feel about the clients we serve?
- What are you most passionate about?

Scored by a panel of agency leadership and board members. Capped at 15.

Two things happen. The people who get in know it meant something, so they show up. The people who did not get in apply again next year.

Now you have a pipeline of people trying to get into your leadership program instead of a pipeline of people trying to get out of your agency.

The twelve-month itinerary.

Jan	Building leadership foundations	**Jul**	Conflict resolution and negotiation
Feb	Personal development and reflection	**Aug**	Decision-making and problem solving
Mar	Self-awareness and personality	**Sep**	Team dynamics and collaboration
Apr	Self-awareness and emotional intelligence	**Oct**	Mission, vision, values, and culture
May	Time management and prioritization	**Nov**	Leadership ethics and integrity
Jun	Communication and influence	**Dec**	Continuous learning and development

The first four months are almost entirely inward. We do not touch team dynamics until September.

Every agency that skips the self-awareness work and jumps straight to management technique ends up with better-trained versions of the same person.

Inside a session.

1. **Leadership training and a team building activity**

   The content. This is the excuse, not the value.

2. **Group discussion**

   The cohort works on each other's real situations, with the coach facilitating. This is where the value is.

3. **Homework**

   Something to bring back in thirty days.

Plus one session where the Executive Director sits in and takes questions. Most of your staff have never heard you say out loud what you think a great leader is.

Look within before you look outward.

Every participant completes both. Neither one is a personality test you file away.

DISC

WHAT THE PROFILE GIVES A PARTICIPANT

- Where their natural style sits, and how strongly
- What drives them: priorities, motivators, stressors
- How they read, and are read by, each other style
- Specific strategies for communicating and handling tension with each

Emotional intelligence

WHY IT MATTERS MORE IN THIS WORK

- Your staff sit with people in crisis all day and carry it home
- Mission-driven people burn out quietly and do not complain first
- Chronic under-resourcing makes every supervision conversation higher stakes
- Self-awareness, self-regulation, empathy, and social skill are supervisory skills, not soft ones

A leader who does not know their own defaults will manage everyone as if they were themselves.

If you do this, buy the real instrument and use somebody licensed to administer it.

RESULTS

What it produced.

Panhandle Community Services

150 employees · 5 cohorts, 2020 to 2024 · 49 participants

- 6 promoted into management positions
- 3 CCAPs earned, 4 more in candidacy
- 2 ROMA Trainers, 2 ROMA Implementers
- Every participant serving on an agency committee or special project
- Central to the agency's Gold tier NCAP Pathways to Excellence award, and now driving the pursuit of Platinum
- Succession plans now exist for all key positions with named successors. Many are ImpactLaunch graduates.

West Texas Opportunities

50 to 75 employees · 2 cohorts, 2023 and 2024 · 18 participants

- 2 promoted to supervisor, 3 to 5 taking on expanded responsibility
- 6 appointed to monthly strategic planning leadership meetings
- Participated in developing the strategic plan and implementing the community needs assessment
- The group now runs the agency's leadership development initiatives, a mentorship program, and a quarterly newsletter

A hundred and fifty employees, and fifty to seventy-five. This is not a big-agency program.

~$12,000

per cohort, per year

9 to 14 participants. Roughly $850 to $1,300 per person, per year.

Now you tell me: what did it cost you the last time you lost a program director?

Credentials, and what they actually cost.

	What it is	Cost	Time
CCAP	Certified Community Action Professional	$600 NCAP member $635 non-member	3-year candidacy Apply July to October
NCRI	ROMA Implementer. Deep ROMA competence, resource to your own agency.	$775	Four phases Needs 12 months in network
NCRT	ROMA Trainer. Certified to deliver Introduction to ROMA.	$995	Four phases including train-the-trainer
E-course	ROMA phase one, if no cohort is scheduled near you	$285, credited toward the full fee	Self-paced

NCAP member agencies get every fourth CCAP enrollment free. Send four, pay for three.

Standard 4.3 requires documenting use of a ROMA-certified trainer. Every dollar on this chart is compliance spending you will make anyway. It may as well develop somebody.

How to pay for it.

- Standard 7.9 makes staff development an expectation, not a luxury. Say that out loud in your budget conversation.
- Indirect cost recovery. If nobody has looked at your rate in six years, look.
- Head Start T and TA line, if you are a grantee. It is already in the budget.
- State and national CSBG discretionary and T and TA dollars administered through FACA and NCAP.
- Grant project budgets. Most program grants will carry staff development for the staff on that grant.
- Capacity building initiatives through local community foundations.
- County-run leadership academies, if you are a department. Free classroom, your cohort structure around it.

Nobody hands you a line item called leadership development. You assemble it. Twelve thousand dollars across five sources is a very different conversation than twelve thousand out of an already tight administrative budget. Creative financing is where you get the investment you need.

THE REAL TEST

Why it outlasted me.

At PCS, ImpactLaunch has become the Excellence Champions Academy.

It is run by a graduate of the program.

If your leadership program dies when the person who championed it leaves, you did not build a leadership program. You built a dependency.

Design the handoff from cohort one. Name your successor facilitator before you need one.

Let’s work together.

Tell me three things:

- Your agency, and how many employees
- One role you left blank in column three
- Who in your building might be able to fill it in two years

It is almost never what you think it is.

You do not have a talent problem. **You have a selection problem.**

You do not have a training problem. **You have a cadence problem.**

You do not have a budget problem. **You have a priority problem.**

And somewhere in your building is a person who does not know you are counting on them.

EXERCISE · SILENT, ON YOUR OWN

Your one-page plan.

1. **1-3 names.** Who is in cohort one?
2. **Cadence.** How often, how long, starting when?
3. **Who facilitates.** Internal, external, or your county's academy?
4. **Funding line.** Which one?
5. **Credential target.** CCAP, NCRI, NCRT, or none in year one?
6. **The first conversation.** Who do you tell, in the next 14 days, that you are counting on them?

Write your 90-day date. An actual date, in your own handwriting.

Not "fall." A date.

JUST AS IMPORTANT

What not to do.

1. **Do not run a one-off retreat.**
   Twelve months of two hours beats one day of eight, every time.
2. **Do not open it to everyone.**
   Application, scoring panel, cap. The selectivity is the value.
3. **Do not send people to training with no follow-up structure.**
   Training without a return date is a benefit, not a program.
4. **Do not promote your best technician into supervision with no preparation.**
   You will lose a great technician and gain a struggling supervisor.
5. **Do not build it around one champion.**
   Name the successor facilitator in year one.
6. **Do not wait until you can do it right.**
   Progress, not perfection.

Leadership is not natural. It is built.
And it does not get built unless somebody decides to build it.

You just decided. You wrote down 1-3 names and a date.

You do not have to launch a program in September. You just have to have one conversation in the next fourteen days with one person whose name you just wrote down. Tell them you see it. Tell them you are counting on them.

ONE ASK

I want to know how it goes.

Scan it if you want me to check in at 30 days and ask how that conversation went.

No cost. No pitch.

- You will hear from me once, in about a month
- It will be a specific question about the specific person you named today
- If you want to keep talking after that, we will. If not, that is the end of it.

RECAP

Six things to take with you.

1. Leadership is not natural. It is built, on purpose, by somebody who decided to.
2. Standard 7.9 is the one HR standard that reads the same for public and private. It is your lane.
3. Twelve months at two hours a month beats any retreat you will ever run.
4. Selectivity is the value. Make them apply.
5. Look within before you look outward.
6. 1-3 names. One conversation. One date.

BEFORE YOU GO

Session feedback for FACA.

Please take a minute to give FACA your feedback on this session.

It takes less than two minutes, and it is how the association decides what to program next year.

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Thank you.