ProInspire
Activating Leaders, Accelerating Equity

CO-CEO Research Project

KLP | KLP IMPACT
COACHING AND CONSULTING

Conducted, compiled, and written by Lupe Poblano and Kris Leja, KLP Impact LLC

November 2022

KLP Impact
Kris Leja + Lupe Poblano
Co-Founders and Principals
kris@klpimpact.com + lupe@klpimpact.com
415-902-9861 + 510-367-9687
www.klpimpact.com

Executive Summary

ProInspire contracted with KLP Impact in June 2022 to help explore what it would mean to permanently move from a Founder, solo-led CEO organization to a Co-CEO structure. This report explores the shifts needed both internally (at the board and staff level) and externally to transparently document this journey and process.

The goals of the project encompassed the following:
- Review the first year of ProInspire's Co-CEO leadership structure.
- Explore curiosities around what is working, challenges, benefits, tensions, and helpful context to inform ProInspire's Co-CEO leadership structure and shared leadership across the organization.
- The findings of this project will support ProInspire Board and Staff to align around the next steps of the Co-CEO leadership structure, inclusive of decision making roles and change management needs.

KLP Impact used a combination of methods for gathering and sharing out information as a part of the research project. Internally, a series of one-on-one interviews, focus groups, team meetings, and board meetings/retreats were utilized to gather information and perspectives on bright spots and challenges with this new model and to then share themes from interviews that helped inform meaning making and potential organizational shifts.

In an effort to get at the root cause of the change, we have identified three key transitions. Shifting to a Co-CEO structure for ProInspire is not just about moving from a single CEO to a two person CEO team, it is also a founder transition and a move to being Black-led. Each of these transitions alone would be a lot for an organization to tackle. Taking on all three as part of this shift requires a more complex set of dialogues, change management protocols, and systems building.

What we heard from all interviews and focus groups is supported by what we already know about organizational change and transitions: they can be hopeful, messy, complex, and cannot be reduced into a single objective experience. The sibling organization interviews helped to normalize these transition pain points and offer a perspective on how they tended to similar organizational culture and structure shifts.

Recommendations are organized into three major areas of focus:

Philosophy:

- Bring Black Feminist Philosophy into our culture and approach, and shift organization policies and practices
- Embrace and practice generative conflict, focus on inner work, normalize cultural practices around feedback, and examine intersections of personal trauma story and habits of white supremacy and anti-Blackness
- Align on transparent decision-making protocols at all levels of the organization

Succession:

- Recognize that a Founder's exit is more than just a new hire
- Re-map roles and responsibilities throughout the organization
- Align on business model and revenue streams to enable time and space to focus on centering relationships, building shared leadership muscle, and nurturing political education and solidarity
- Keep learning from and strengthen connections with sibling organizations going through similar transitions

Structure:

- Shift to a permanent Co-CEO leadership structure
- Shift narrative from "change is happening to me" to "I am consenting to playing a role in our transition and transformation"
- Deploy liberatory structures in the selection process of the new Co-CEO, by ceding decision-making power to the remaining Co-CEO and have board play an input role
- Make radical choices when it comes to compensation and lean into an abundance mindset

Goals for Research Project

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Structure for Gathering/Sharing Information

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Internally, a series of one-on-one interviews, focus groups, team meetings, and board meetings/retreats were utilized to gather information and perspectives on bright spots and challenges with this new model and to then share themes from interviews that helped inform meaning making and potential organizational shift. A set of ground rules was upheld, to ensure that interviews and dialogues were systems focused rather than people focused to help inform what shared leadership means to the staff and board.

Externally, a total of six external one hour long interviews with 'sibling' organizations were conducted. Sibling organizations are defined as organizations that are in the movement/nonprofit oriented capacity building, leadership development, organizational consulting space and have already moved to a shared leadership model - at least at the executive level.

Meaning Making

KLP Impact took all of the interviews, focus group conversations, and board and staff convenings and settled on a set of themes to guide the recommendations. What emerged from the conversations is that there was not just one transition, but three significant organizations happening simultaneously and interdependently.

Three Key Transitions Occurring

ProInspire is at a unique inflection point in their 13 year history. In an effort to get at the root cause of the change, we have identified three key transitions. Shifting to a Co-CEO structure for ProInspire is not just about moving from a single CEO to a two person CEO team, it is also a founder transition and a move to being Black-led. Each of these transitions alone would be a lot for an organization to tackle. Taking on all three as part of this shift requires a more complex set of dialogues, change management protocols, and systems building.
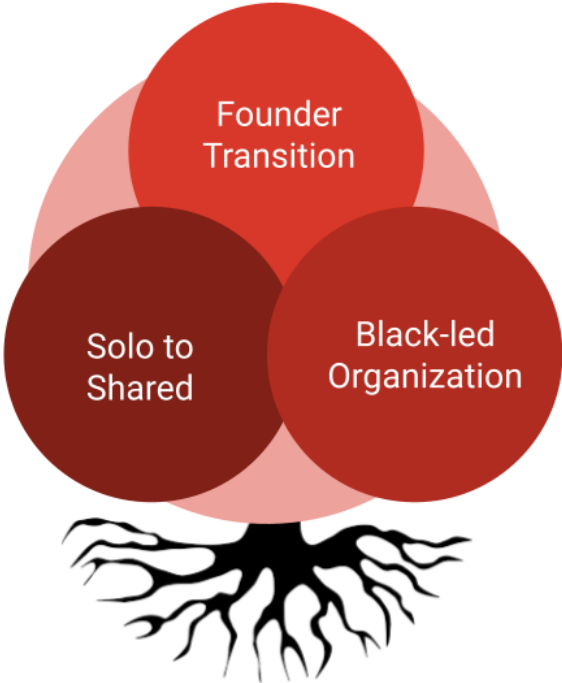
Below you find the bright spots and challenges experienced by the board and staff in relation to each of these key transitions.

Founder

BRIGHT SPOTS	CHALLENGES
Institutional knowledge transfer is possible because the founder has given a long transition timeline	Lack of clarity on vision for ProInspire: Is there a clear mandate for change? What is our focus: race equity or racial justice?

Supporting a first time CEO (as co-director)	Default of habits and norms, lack of clear process and timelines
Stability for the organization through this transition	Scarcity around finances-what will happen if we make bold shifts?
	Next steps in success planning unclear

Solo to Shared

| BRIGHT SPOTS	CHALLENGES
Sharing the burden and support at the executive level	Decision-making and role clarity for CO-CEOS isn't always clear
Deep appreciation when there is alignment and purposeful communication of decisions	Lack of shared leadership clarity: ● Why did this shift happen? ● Lingering questions about the last selection process (Co-CEO and COO) ● What does shared leadership mean? ● Will this extend beyond executive level?
Balance of personalities, skills, and lived experiences	Communication can be lacking

Black-led

BRIGHT SPOTS	CHALLENGES
Excitement for where Bianca can take us	Feedback culture and structure currently in place: Conflict avoidance, right to comfort, transparent processes, culture of nice
Affirming of Bianca's leadership: integrity, intention, skill set, visions	Internal political alignment: ● Shared definition of pro-Blackness ● How are the layers of white

	supremacy and antiblack racism getting replicated and showing up? ● Does shared leadership mean shared power?
Strong racial justice analysis and what that means for the future	Burden of change on Black leadership

From these three transitions we identified a number of core intersections that get to the heartbeat of all three transitions, and therefore need time and attention to unpack them more thoroughly:
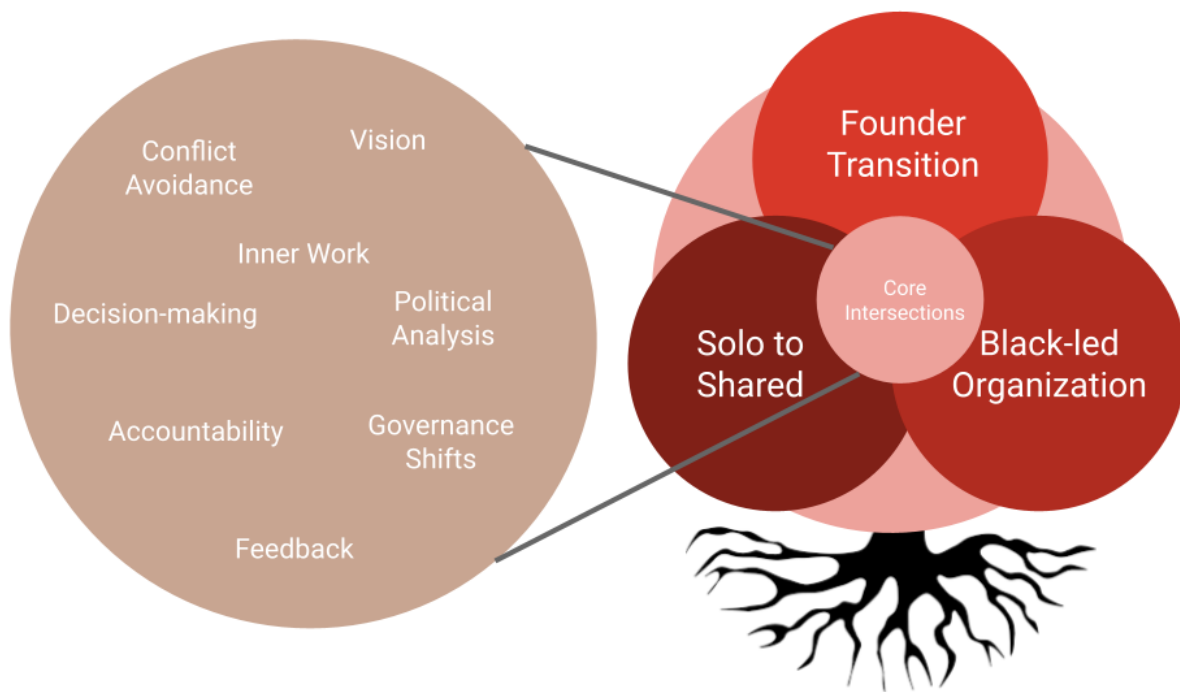
What did we learn?

What we heard from all interviews and focus groups is supported by what we already know about organizational change and transitions: they can be hopeful, messy,

"This is like a marriage, this is a deep relationship"

Sibling Org

complex, and cannot be reduced into a single objective experience. The sibling organization interviews helped to normalize these transition pain points and offer a perspective on how they tended to similar organizational culture and structure shifts. Details on all interviews and focus groups are outlined more fully below.

role white
hard feeling
decisions hopeful
black
good different
work
inspired
share
destabilizing
power justice
leadership
person racial
process
shared

Overall Themes from Staff

As shared above, staff are experiencing a number of shifts organization-wide as it relates to a new executive leadership structure. In addition to the Co-CEOs, a COO position was introduced and reporting lines shifted. In general, there seemed to be a lack of consistent communication about "the why" behind the executive level changes, the strategic planning process and

"When talking to both individually their (co-CEOs) perspective is really strong, somewhere when they merge their viewpoints it can get diluted. Maybe it's arriving at consensus? How do we define race equity, liberatory work, pro-black it's not as punchy or as strong as when they talk about it individually, externally it comes off as bland, since they are trying to find the common ground between the two [of them]."
Staff

corresponding vision, and how ProInspire would be defining itself in the social justice ecosystem. Additionally, confusion around who was responsible for vision and decision-making also caused a slowing down of activities and key projects, as more

approvals and checking in was needed. Accountability has gotten more ambiguous and both Co-CEOs are still holding key project and client work. When conflict does occur, these concerns are not always voiced and discussed (or only named in full group spaces with no clear container for the conversation). At times defensiveness can creep in and a structure for rupture and repair has not been established.

"Feedback culture is a larger org thing to work on. It feels like playing a game of telephone. I might mention something in my one-on-one and that gets shared with the [other] Co-CEO, then in a group meeting it seems like a bigger issue, and I'm not always sure if my feedback was heard correctly." Staff

"Even if we don't like it just tell us what you want. I can deal with it or tell you I don't like it. I'm more comfortable with you exercising your power as long as I can give feedback."
Staff

"The ways we talk to each other does change depending on who is in the room. Having more conversations about whiteness and anti-blackness and how it shows up is needed."
Staff

"Clarifying where we actually are vs. where we aspire to be. Right now we all know we are a management consulting firm, but no one explicitly says that. Are we at that intersection of moving into a racial justice organization?"

Staff

Staff also named the excitement about a new vision for ProInspire, one that is grounded in pro-Black politics, Black feminist principles, and an exploration of what it means to be Black-led, not just at the co-director level but throughout the organization. They also noted that the Co-CEOs were expressing that this new leadership structure was really supportive and more sustainable.

"Accountability and power rests with a team rather than a sole individual."
Staff

> "They're so different, different approaches, different lived experiences, different ways of working. Over time that can really stand out more. And that's wonderful." Staff

> "They are really receptive to getting our input, but there is a bit too much of it at times. The Emergent Learning Framework is something they are really good at."
>
> Staff

A mixture of staff members have experienced co-directorship structures at prior organizations and some are new to this structure. Moreover, the majority of team members were also hired in the last year and many only know the Co-CEO structure as the leadership structure at ProInspire. Only a handful of staff members have been with ProInspire and experienced a sole CEO and then the shift to a Co-CEO structure. Those staff have on average worked at ProInspire for 5+ years.

> "I need a clear definition of what shared power means for us, for the organization and for the Co-CEOs. Having that clarity could shift my buy-in when it comes to the Co-CEO model."
> Staff

We want to be clear that these pain points and bright spots are not specific to a person but a high number of high stakes change management elements occurring simultaneously.

Overall Themes from Board

The board named a number of areas for growth and exploration as they continue to deepen understanding of what it means to support Co-CEOs, a change in board chairmanship, and an examination of what role the board will play in succession planning for the future. A number of shifts at the board level were identified that supported the current structure and include: a clear understanding of what each Co-CEO is

> "I'm not sure we should have one chair or an executive committee, it feels dissonant with the staff structure to have such a traditional model. We are small enough to be more creative and nimble."
> Board Member

responsible for and who to go to for what; exploring shifting the board chair role to a co-chair role; and executive succession planning is being addressed and planned for.

Things that haven't worked so well include: sticking to approval processes that worked for a sole CEO model, but not in the new structure; under communicating from both board and staff around shifting expectations; and not moving within the same time frame to examine how the board needs to change in relation to this new leadership structure.

> *"There was a giant misunderstanding and miscommunication, rooted in what we had done before vs. what we should be doing going forward."*
> Board Member

> *"How do we shift the board to be more partnership and collaborative with the co-directors"*
> Board Member

Overall, the board is very open to examining its current governance structures, how the new Co-CEO is selected, and how to organize themselves for maximum impact and support during these transitions.

> *"Does the board chair fully embody what's needed for black leadership. Does the executive committee affirm the black leadership in the way that it needs. Does the full board affirm black leadership in the way that it needs to. Maybe we need board coaching to ensure we aren't unintentionally undermining black leadership"*
> Board Member

> *"Would love to have a conversation about what do we mean by pro-black?"*
> Board Member

The board composition includes a mixture of members that have either never experienced a co-director structure or experienced a co-director structure either as a board member on another board, at an organization where they work, or are in a co-directorship themselves.

Recommendations

Utilizing all of the learning from the interviews, focus groups, meaning making sessions, and share outs with both board and staff we have aligned on these recommendations for ProInspire.

Philosophy

It's critical that at this juncture of expansion and change for ProInspire that both staff and board collectively ground in where they are going. Visioning work and the upcoming strategic planning process will allow the team to explore the following:

Bring Black Feminist Philosophy into our culture and approach
- A collective grounding in Black Feminist Theory:
    - Helps with political alignment and understanding,
    - Define what "pro-Black" means for ProInspire and how it supports shared leadership
    - Informs pedagogy
    - Shapes culture
    - Leads to tangible shifts in org policies and protocols
- A collective grounding and alignment should make visioning and strategic processes feel more organic and collectively driven.

Generative Conflict
- Space for inner work to examine intersection of personal trauma story and habits of white supremacy and anti-Blackness.
- Restorative Justice practices for how conflict and tensions gets resolved in an organizational context.
- Continue to build and normalize cultural practices around feedback.

Decision-making
- Create protocols for decision-making at the board and staff level.
- Engage in skill building and transparent tools to support shared leadership at all levels.

Succession

With the Founder exit imminent in the next year+, a focused set of activities on what needs to shift, evolve, and continue will be critical.

Founder's Exit

- Re-map roles and responsibilities throughout the organization - visibilize and redistribute decision-making and emotional labor.
- Align business model and revenue streams to enable time and space to focus on nurturing internal political education/solidarity, center relationships, and build shared leadership muscle throughout the organization.
  - A discipled earned revenue strategy that right-sizes projects economically and aligns it with emerging philosophy and vision, and
  - Contributed revenue that supports the transition to living into a pro-Black politic: multi-year general operating support, and philanthropic partners who want to invest in these transitions.

Strengthen connections with sibling organizations at all levels
- Positional connections: Co-CEO, Directors/Practitioners, Board members at sibling organizations going through similar transitions.
- Spaces for processing, sharing, conspiring.

Structure

The selection of the new Co-CEO will be a critical new hire for the organization and will have an impact on how the organization is not only structured but the process by which the new Co-CEO will be selected, retained, and onboarded.

Shift to a permanent Co-CEO leadership structure
- Recognize that this shift will change job descriptions and expectations:
  - Clarify the invitation for what it means to be part of this community, check for consent, engage in re-contracting.
  - What does it mean to say "yes" to being at ProInspire in 2023? What is expected of me (both soul and role)? What can I expect in return from ProInspire?
  - Shifts narrative from "change is happening to me" to "I am consenting to playing a role in our transition and transformation."

Selection Process
- Delegate co-executive decision to remaining Co-CEO.

- Staff plays an active and engaged role throughout process.
- Board's role in input and shaping the mandate/invitation for new co-director (e.g what is this new co-executive called to lead us into?).

Compensation

- What does being a Black-led, shared leadership organization mean for our compensation philosophy and process, especially at the executive level?
- What does the onboarding process look like to ensure a supportive transition into ProInspire occurs and retention of the new Co-CEO is prioritized.