

What If.....You Have to Replace Your District Manager?

Management Transition - Challenges and Opportunities -

A White Paper for Conservation Districts

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This outline and attached case studies reflect the experience of two relatively long-term district managers (one recently retired) as well as the thoughts and feelings of three relatively new district managers who have taken over their positions with different situations and experiences. The new managers were either “promoted” from current staff positions or recruited from outside the district for their expertise or management skills. The goal of this paper is to help prepare district boards for “What if... You Have to Replace Your District Manager”.

Disclaimer:

The information and materials presented here are those of conservation district members that have had experience relating to the topic. They are sharing their successes and challenges in this paper as a service to other conservation districts that may experience similar situations. The information is not meant to be authoritatively the best/only way to proceed. It is meant as a guidance tool.

OVERVIEW – THE WHY?

Although potentially stressful, labor intensive and fraught with uncertainty, navigating a district management transition can also be viewed as an extraordinary opportunity for a board to have a lasting effect on the district it governs. Whether the manager’s departure is the result of a long-planned retirement or an unexpected event, the board can more successfully steer the district through such a change in leadership by anticipating what needs to be done to ensure the well-being of the district and putting a well-defined plan in place to set the stage for the transition to a new manager.

Consider these findings of a recent national study of nonprofit executive leadership conducted by CompassPoint Nonprofit Services and The Myer Foundation:

- 3 out of 4 survey respondents plan to leave their current jobs within 5 years.
- About a third of respondents were dissatisfied with their compensation, although those who plan to leave within a year are nearly twice as likely to be dissatisfied as those who plan to stay longer.
- Despite the large number of respondents contemplating transition, less than a third had discussed a succession plan with their boards.

At a recent District Managers’ Summit, about 1/3 of those present indicated they could be within 5 years of retirement. Manager turnover is also occurring with new job opportunities, illnesses, death, termination, etc., and there is not always time for as smooth a transition as might be desired. Summit attendees expressed concern about the potential impacts to district operations statewide from the loss of experienced managers.

In addition, manager responsibilities are much more complex today compared to several years ago (see statement in *Boards Managing Managers White Paper**). Boards need to have a solid understanding of the skills – management, personal, technical, administrative – that best fit the needs of the district and the expectations of the board. With the position of manager so vital to the operation of the district, the smooth replacement of a manager is paramount to the continuity and stability of district operations and a key responsibility of district boards.

** Note: This White Paper could be considered a companion paper to “Boards Managing Managers” since it has many areas of overlap.*

THINGS TO CONSIDER AND EVALUATE

A successful management transition requires more than just a search for and selection of a new manager; it is a process that should start well in advance of a vacancy and continue post-hiring to create a solid foundation for a smooth transition:

Understand the Job of the District Manager

- Review and update the job description; have consensus of the skills, abilities and qualifications required
- Clarify the board's expectations of the manager
- Examine the compensation package
- Agree on a formal and regular performance evaluation process

Conduct a Board/Organization Self-Assessment

There are some excellent resources available from a variety of sources for organizational evaluation. Ask your DEP field representative for board self-evaluation tools, check with PACD for leadership development tools and visit www.boardsource.com for a broad range of insight and ideas on board governance.

- Identify opportunities for strengthening the board's effectiveness and improving the support system available to a new manager
- Define the board's role in relation to the manager, i.e. how the manager is expected to work with and through the board. Consider the management philosophies/styles of the board and what manager philosophies/styles would provide a good fit.
- Be sure the board is clear on the district's mission, priorities and goals, as well as the organization's financial position, so that they may be successfully communicated to a new manager

Have a Leadership Transition Plan

- Develop an emergency leadership transition plan to deal with a sudden, unexpected manager absence or departure. This may involve appointing an interim manager or management team.
- A transition plan should include processes for recruiting, selecting, and training a new manager. Whether the manager is a county or a district employee may impact greatly how this process unfolds.
- If the manager is a county employee, the district board should already have an MOU in place that details, among other things, what role the directors will have in the manager selection process.
- Consider a search team to include board and county representation and possible staff input. Decide on the role, if any, of the current District Manager.
- Have a mechanism to keep the full board, staff members and stakeholders engaged and informed about the status of the leadership transition. Consider an "official spokesperson" to provide regular updates without disclosing confidential information.
- Review different means to advertise or recruit candidates considering county procedures if applicable, PACD web site and e-mail, district or cooperating organization publications, newspaper ads, postings for existing staff, etc.

- Determine a candidate review process – resumes, applications, screening committee, number to interview, etc.
- Decide on a selection process – interview team, protocol, standard questions, legalities to consider, candidate presentations, background materials about district for candidates, adequate reference input. Ask other Districts for innovative ideas on getting the most out of interviews.

Transition Activities Once a Manager is Selected

Some people the board may want to solicit to assist in the transition process include: the current or previous manager (if possible), assistant manager or middle management (if in place), directors with some management experience or tenure on the board, DEP field representative, regional managers, county officials.

A variety of activities that could be helpful to orient the incoming manager:

- Visit agency heads that may be co-located in same building i.e. Extension, FSA, NRCS, etc.
- Visit state and private agencies in Harrisburg or at regional offices to meet key personnel – DEP, PDA, SCC, NRCS, PACD, PEC, Penn Ag, etc.
- Visit other conservation district managers in your region.
- Visit county organizations that have ties with district i.e. commissioners, planning commission, ag preservation office, building industry association, watershed organizations, other local cooperating agencies, etc.
- Visit with directors at their farm or place of business.
- Attend meetings (as appropriate) where decisions impacting the district may take place such as: Commissioners meetings, PACD Executive Council, SCC meetings, Nutrient Management Advisory Board, local Chamber of Commerce, watershed meetings, etc.
- Seek a good historical perspective of the district from longer-term directors, retired staff, prior years’ annual reports, etc.
- Visit one or two of the more successful conservation districts in the state that have an excellent reputation with the goal of to getting a view of how they operate and how they have achieved success. You may want to choose one that is about the same size as your district as well as a larger district.
- Conduct informal interviews of individual district staff members to get a perspective on office “traditions”, staff contributions to the organization and ideas on working effectively with staff, board and other stakeholders.

Examples of important administrative items that should be reviewed or learned (all may not be applicable to every district):

- District Policy Manual
- Program delegation agreements and contracts
- MOU’s
- Conservation District Law
- Legal Counsel (where and when to seek help)
- District Budget
- Financial record keeping system (Quick Books, ledgers, etc)
- Audit procedures

- Quarterly reporting requirements
- Administrative cost allocation formulas
- District filing system(s)
- Insurance policies and coverage
- Equipment inventory
- District credit cards
- District vehicles
- If District owns the building, all the legal, financial, maintenance, management and contractual responsibilities of the manager
- Strategic Plan and annual planning process
- Preparation of board meeting agendas and supporting materials
- Director orientation and retreats
- Nominating Organizations and director appointment process
- Associate director program
- District committees
- Manager time allocation
- Individual program briefings
- Organization chart and delegation of authority
- Job Descriptions
- Employee evaluation process and recent evaluations
- Salary determination procedures
- Payroll procedures
- Employee benefit management for retirement plans, health coverage, insurance, etc.
- Staff meetings
- Tree sales and Envirothons
- District and PACD Awards
- Annual Banquet

A New Manager's "Wish List"

Whether a new manager has been promoted from within the organization or hired externally, there was basic agreement among the *District Authorities* providing case studies for this paper about some of the resources that can help make the transition smoother:

- A good policy manual and comprehensive procedural guidelines, including a clear definition of the manager's limits of authority
- An organizational chart explaining agency interactions
- A training manual covering the basics – all in one place – for example:
 - Conservation District Law
 - Delegation Agreements
 - Quarterly Reporting Process and Contacts List
 - Sample Budgets
 - MOUs
 - What If Papers
- A formal mentor program (with experienced district managers)

- Board support that is clearly communicated and demonstrated – a truly involved board
- A formalized MOU between the Board and County (prior to hiring the manager) that clearly defines the roles of each
- A list of short-term and longer-term priorities and priority projects
- Staff and board-developed list of vulnerabilities, or areas that need immediate attention
- At least a one quarter transitional phase with access to the former manager
- Some level of middle management to facilitate transition
- Availability of management training tailored to meet individual needs

CONCLUSION

It is seldom possible to predict the exact timing or circumstances of manager transitions or to plan every step in advance. However, boards who have a fundamental understanding of the manager's job, who invest the time in developing a replacement plan and who create the conditions for an effective manager to succeed *before* being faced with an impending departure are better equipped to turn what can be a difficult task into an opportunity to strengthen the organization.

CASE STUDIES

The *District Authorities* listed on the cover page were asked to provide a brief summary of "vital information" on how their districts approached the transition between an outgoing manager and the individual hired to replace him/her. In addition, the facilitators utilized information from Dauphin and Lancaster County Conservation Districts, which have experience with planning for (in the case of Dauphin) and successfully navigating (in the case of Lancaster) the retirements of long-term district managers.

District Manager Transition Case Study - Union County Conservation District

In the spring of 2004, the District Manger of the Union County Conservation District, with 20 plus years of service in that capacity, decided to resign. Neither the District board, nor the County Commissioners were prepared for this sudden vacancy of the manager. Within several weeks of the former manager's resignation announcement, the County Commissioners appointed me as interim manager. In Union County, Conservation District staff, including the manager, are considered County employees.

I had been with the District for 15 years at that point, and had exposure to most of the District programs during that span of time. My familiarity with the District programs, staff, and clientele was very beneficial in transitioning into this temporary management role.

As part of the interim manager arrangement, I received a stipend and remained in that role until the new manager was hired. I continued to complete my normal workload requirements as the County's Agland Preservation Administrator during this phase. In order to begin the hiring process, a meeting was conducted between several District Board representatives and the County Commissioners to establish a committee to review and update the job description for the manager position. After a finalized version of the job description was approved by the committee, the County advertised the position vacancy locally through newspapers and nationally through the County and PACD websites as well. Resumes, job applications, etc. were reviewed and it was decided that four candidates would be interviewed for the position. I was one of two of the interviewees who were current District employees. The Committee made a hiring recommendation to the County Commissioners, who mad the decision to hire me for the manager position effective in July, 2004.

My main strength in transitioning to the new role of District Manager was beyond a doubt the exposure I had had with District programs, procedures, and overall comprehension of Conservation District function. Although it was somewhat difficult to transition from peer to supervisor, the transition was for the most part accepted by the staff without too much hardship. I had previous management experience prior to coming to the District and also run a farm business, both of which aid considerably in the administrative learning curve for management of this organization. One thing that also aided my transition to manager was that over the years I had taken a leadership role in several areas of District programming which allowed me to make some management decisions, albeit low-level decision making that it was.

During the initial probationary phase of my management position and subsequently as well, the County Commissioner's and District Director support for allowing me to go to appropriate training has been very strong. Besides the normal management training available through traditional District sources, I have also attended three additional training courses over the last two years that have been extremely beneficial to my overall management skill development. These were as follows: "Maximum Impact" Leadership Development by John Maxwell, Penn State's Management Development Short Course, and Career Track's "Effective Supervision". I would also like to comment that the training made available through PACD and DEP has been very valuable as well. In particular, the

employment law seminar conducted by the Leadership Development Committee was very good.

I would be remiss if I did not cite the evolution that the District itself has gone through recently as part of the overall transitioning experience. Our District conducted a Leadership Development "Team Visit" and "Strategic Planning process" all within the first year of my becoming the manager. These initiatives have served the District well in preparing us to enter into the twenty first century as a solid grass roots level environmental service organization to Union County.

With regards to my transitioning into manager, guidance or instruction from the Board was fairly weak. It appeared to me that they were there if I needed them, however, they did not provide much in the way of proactive instruction as to what their expectations were or how I was to go about meeting them. However, my predecessor did make himself readily available during the initial phase of my transitioning to manager. This was extremely helpful with understanding the financial details of the District. Two other individuals became very important to my success in transitioning to District Manager. They were my regional DEP Field Representative and our County Chief Clerk. The field rep. was helpful in many ways, not the least of which was just being there for moral support through my growing pains. The Chief Clerk, being my immediate supervisor, helped to guide me through the maize of county policy, budgeting, and other important management disciplines.

Overall, the experience has been a success in my opinion. The District Board allowed me the flexibility to make the changes I deemed necessary and they supported most of the recommendations that I have suggested. I look forward to many years with the Conservation District and I am hopeful that the Board, staff, and myself will continue to grow a better Conservation District for Union County.

Note: Since hiring a new manager, Union County Commissioners and the Conservation District Board have drafted an MOU which includes language regarding District Manager hiring. The draft guidance reads as follows:

A seven member joint committee consisting of the District Board's personnel committee (3 members, plus one additional board member appointed by the District Chair), 2 County Commissioners (made up of the Chairman of the County Commissioners and the County Commissioner representative to the District), and the County Chief Clerk are responsible for filling a vacant District Manager position. The final hiring decision for the District Manager is to be made by a super majority vote of 5 members of this joint committee. If the County Commissioner representative to the District is serving on the District's personnel committee at the time, the District Chair shall appoint a temporary substitute on the personnel committee for purposes of filling a vacant District Manager position. If the County Commissioner Representative to the District is also the Commissioner Chairman, then the Commissioner Board Vice Chairman shall be the second County Commissioner representative to this committee.

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District Manager Transition Case Study – Wyoming County Conservation District

The transition of management of the Wyoming County Conservation District (WCCD) took place between August and October 2004. The former manager resigned August 4, 2004 to take a position with the DEP. The Wyoming County Commissioners appointed a current employee as the interim manager. He had the most seniority and experience at the District.

I was made aware of the position opening by a District Director and was encouraged to apply for the job. My previous employment was as an agricultural credit officer for the past 12 years, with 4 of those years as a branch manager. My education background is a BS Degree in Ag Business Management, and I grew up on a farm. Although I did not have the Environmental Resource background, several of the directors felt that I had the qualifications to be eligible for the position.

After submitting an application and resume' to the Wyoming County Commissioners, I was invited to interview with the WCCD personnel committee, which was made up of 6 board members. They interviewed the initial applicants that they felt were qualified for the position. The personnel committee then made their recommendation of the top three candidates to the County Commissioners. I was requested to interview a second time with the County Commissioners. After that interview I was offered the position.

I began employment with the WCCD in October and spent the first few weeks going over program information, grants and MOU's to get a better understanding of the District's programs. The interim manager and the DEP Conservation District Field Representative were very helpful in explaining programs and the accounting process. Interaction with each staff member also helped me get a handle on their programs. The WCCD board and County Commissioners were very supportive, but had limited knowledge of the program details.

My previous job experience, exposure to Conservation District & USDA programs, and knowledge of the county were very helpful in the initial transition to manager. The previous manager was available to me for some guidance, and I often called neighboring district managers to ask questions. The drawback of not moving into the manager's position from another district position was truly the lack of understanding of the various programs and their relationships to the various agencies - DEP, PDA and SCC.

I feel that the regional and state PACD meetings, the District Manager's Summits and the Leadership Development seminars are invaluable to managers, new and old. These meeting forums give managers a great opportunity to learn about programs, meet the program administrators, and question and share ideas and challenges that we face in our positions and counties. The Conservation District Program and Budget Book was also helpful in keeping on track with reporting requirements.

It would have been helpful to have had more specific training early in my tenure about the various DEP bureaus/divisions/sections and how conservation districts fit in. The most challenging task was understanding the various program expensing for grants and special

projects - they are each a little different from one another. I would have liked to have had more guidance in the District bookkeeping system. I think there is a need for more training for the less tenured administrative staff on accounting and bookkeeping.

To make manager transitions smoother for districts, it would be helpful to have some sort of training manual that explains the funding sources, the reporting requirements, and accounting for conservation districts. The continuation of the Leadership Development programs and DEP trainings is highly recommended, and new managers should try to establish a mentor relationship with an experienced manager.

Overall, I would say my transition was very challenging coming from an outside organization and not having some environmental background. Having a relatively short tenured staff at WCCD has also been a big challenge in making the transition to a district manager. There are numerous training opportunities available to District staff and directors, and the WCCD has been very supportive of our staff training. I feel that the WCCD board could give more input on their expectations from the manager, but overall they and the County Commissioners have been very supportive of my recommendations and changes.

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District Manager Transition Case Study – Susquehanna Conservation District

In the fall of 2003 the District Manager of the Susquehanna County announced that she planned to retire at the end of the year. This person had worked for the District for nearly 28 years. During this time the District had grown from 1 or 2 staff to 8 full-time and 1 part time staff.

In Susquehanna County, District staff are considered to be county employees. The District Directors have always been involved in making recommendations about staff (hiring) changes to the County Commissioners. The District advertised for the position of District Manager. With the encouragement of other staff members I decided to apply for the position. I felt that my 10+ years of experience with the District programs would be considered an asset. I had worked with many of the cooperating agency representatives as a District technician with the Chapter 102 and 105 programs. I also felt that while working with the Dirt and Gravel road program I had developed a good working relationship with township supervisors and area farmers and landowners. Having these contacts in place has proven to be a very big help during the initial transition period.

After receiving applications for the vacancy, a committee of the Conservation District Directors conducted in-depth interviews. The first part of the process consisted of an impromptu five- minute presentation by each candidate in front of the committee and the other applicants entitled "why I should be chosen for this job". Each of the applicants was then interviewed individually by the committee. The others who were waiting to be interviewed were excused to another conference room to hand-write an autobiography. After the interviews were completed we were all invited to have lunch with the staff (at which time I promptly dropped a large gob of mustard on my tie!). The Directors appeared to be very interested in promoting from within the District. In March of 2004 the District Directors recommended to the Commissioners that I be hired as manager. The County Commissioners appointed me the following month.

Some of the initial challenges during the transition period included the lack of clear overall direction for the District. With the time lag between managers there was no opportunity for training by the former manager. The Office Manager has worked at the District for about 15 years, and was very instrumental in helping me understand the financial aspects for all of the programs. Traditionally the Board of Directors have not been intimately involved with the day-to-day operation of the District and therefore weren't able to help with detailed questions. Yes, we did have a 5-year strategic plan but it just didn't provided the specific guidance I was looking for.

Lack of a District policy manual presented another challenge. District policy can be extremely helpful to provide consistency and guidance. Since my hiring, we have made a great deal of progress assembling a District policy manual. One of the new directors has chaired a policy committee, and they have been very interested in my input to all of the policy development. The District's DEP Field Representative was also very helpful in this process.

Many of the directors have been part of the District for a very long time. One director has served for 44 years, and several others have served for 20-25 years. Although I would consider my management style to be different than the former manager, the directors have been rather supportive of most of the changes I have suggested.

More challenges have been experienced with the County level of government having 3 new Commissioners elected just prior to my appointment. In the second year of the Commissioners' term they replaced the solicitor and the chief clerk (each resigned). Most of the new people had little knowledge of District operations. I have therefore made an extra effort to invite all of the Commissioners to as many of the District's functions as possible. The Chief Clerk and I have discussed several times the differences between the Conservation District and other county departments. I plan on utilizing my DEP Field Representative to help the Chief Clerk learn the director nomination process.

Included in the positive things happening during this transition process was my attending the District Managers' Summit. I have learned a great deal from the presentations and even more from interactions with the other managers. I have asked to revive a regional managers meeting, and I believe that is coming together through the DEP Regional Field Representative. I think the e-mail list serve for managers has also been a huge asset at my fingertips. Even if a question is asked and I can't provide input I always read the responses. One more thing that benefited me and helped to encourage the directors was the District Visit that was conducted by the Leadership Development Committee. The visit was conducted during my first year as manager and helped the directors appreciate some of the assets within our Conservation District, including the staff, which works very well as a team.

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