Shared Leadership and Executive Director Retention in Kootenay-Boundary Community Social Services Organizations

by

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We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and W̱SÁNEĆ peoples whose historical relationships with the land continue to this day.

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Acknowledgments

My thanks begin with the project client, the Kootenay Boundary Community Services Co-operative, and its members for their interest and willingness to explore this topic. The co-operative's dedication to supporting the social good sector is a real-life manifestation of the community development ideals I studied through UVic's MACD program. I am proud to contribute to the Koop's collective movement of "strength through connection." My thanks also go to the research participants who gave me something precious – their time and insights. My academic supervisor, Dr J Barton Cunningham, has my deep appreciation for his guidance, encouragement, and exceptional ability to keep me focused.

"No [wo]man is an island" (John Donne). This is a study on shared leadership in the nonprofit space. Undertaking a master's degree turned out to be a community effort as well. I have received years of support since first embarking on this journey. Thank yous are in order to my parents, Barb and Don Smith, who have met my academic endeavors with initial surprise and subsequent wholehearted support, to my partner, Eric Harris, who did not allow me to get in my own way, and our baby girl, Maggie, who arrived midway through this process, creating the ultimate incentive to get on with it. My gratitude cannot be understated to Anne, Lenora, and Cliff Trenaman and my parents for watching Maggie while mom did her research. And lastly, my thanks to Lindsay Barnett, an MACD graduate, who encouraged me to go for it in the first place.

Subjectivity Statement

I am grateful to live and work in the traditional territories of the Sinixt, the Syilx, and the Ktunaxa, also known as Nelson, B.C., Canada. My interpretations come from my experience living as a cis-white, hetero, non-disabled woman. I was born and raised in British Columbia and benefitted from the colonial systems surrounding us. My professional experience is 15 years working in the nonprofit space and, more recently, in the cooperative and human services realms. I am an employee of the client, the Kootenay Boundary Community Services Cooperative, and have a professional relationship with many of the study's interviewees.

Executive Summary

Introduction

The Kootenay Boundary Community Services Co-operative, or "the Koop," is a 20-year-old nonprofit organization committed to "strength through connection." In execution, that translates to supporting its 18 regional community services agency members through capacity-building work, networking, and resource and knowledge sharing. Across the nonprofit sector, executive director turnover is accelerating, and baby boomer retirement is underway (Froelich et al., 2011; Hunter & Decker-Pierce, 2021; Statistics Canada, 2022). This trend is compounded by the stressors of navigating the recent COVID-19 pandemic and the resulting increased demands on these agencies ("Under Pressure," 2024). The Koop membership is no different; in the last three years, over half of the member executive directors have left their agencies, and in some cases, several times over. The research objective of this study was to examine the relationship between Koop member executive director retention and shared leadership, broadly and on an individual construct level (through mission motivation, trust, perceived organizational support, team heterogeneity, and voice).

Methodology and Methods

A qualitative research methodology was used to tackle the research questions of "Does shared leadership provide a protective effect in community services organization executive director retention?" and "What influence do the various shared leadership constructs have?" Semi-structured interviews with a mix of theoretical and critical incident questions were employed. This method provided results with depth, context, and nuance. The study's interviewees comprised volunteer board members and current and past executives from Koop member agencies. Alongside this, a review of academic and sector-specific gray literature was conducted. The recorded interview transcripts were coded, and the researcher wrote analytic memos post-interview to reflect on significant themes, surprising results, and researcher subjectivity. The researcher developed a framework (see page 7) to rate shared leadership constructs to group results and establish patterns, contributing to an overall shared leadership rating. Actual and predicted executive director (ED) tenure was also analyzed and quantified. Data was explored on an individual executive and an agency level.

Key Findings

Shared leadership and its constructs were associated with longer actual and predicted executive tenures within this sample of community services organizations. Mission motivation, trust, perceived organizational support, team heterogeneity, voice, and vision (which emerged during the data collection process) all demonstrate a positive relationship to ED retention. Furthermore, when these constructs were chronically low or at risk, the opposite was also true - low shared leadership constructs were associated with executive directors being at risk of leaving the agency in the next few years. Mission motivation and trust emerged as foundational

constructs, meaning shared leadership was a non-starter in their absence. Perceived organizational support and team heterogeneity had the most significant variability across agencies. These constructs provide the most room for organizational improvement. Additionally, because these constructs were not as ambiguous or culturally taboo as others (i.e. trust, or voice), they received more attention in the discussion and recommendations section. “Vision” emerged as an important aspect of shared leadership, related to mission motivation but separate and essential in creating the alignment needed for shared leadership and, thus, long executive tenure.

Shared leadership constructs revealed their interconnectedness and moderating abilities towards one another (further illustrated by the conceptual framework (see Figure 2.2). Constructs also appeared to be fluid, changing over time. Lastly, the highest-ranking shared leadership models studied were those with formal co-leadership models (two or more executive directors at an agency). The openness towards co-leadership models vastly differed across executives and board members, with executives uniformly expressing that co-leadership could be ideal in specific contexts. In contrast, only half of board members felt similarly. Well-established senior leadership teams that espoused the various constructs were also highly rated in shared leadership.

Recommendations

The following recommendations arose based on these findings and the literature review conducted. The first is to create opportunities for Koop member agency boards and executives to explore shared leadership models. The second is an extension of the Koop's longstanding work – to invest and build on resources to address ED isolation and burnout. Lastly, an executive director retention strategy framework should be created to formalize the shared leadership benefits, harnessing their power to retain qualified, valued leaders. In order to implement these recommendations, buy-in from members is necessary as the Koop is a member-led, consensus-driven co-operative.

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Abbreviations

CSO: Community Service Organization, also referred to as “organization,” and “agency”

ED: Executive Director

Koop: Kootenay Boundary Community Services Co-operative, the project client

POS: Perceived Organizational Support, a shared leadership construct

1.0 Introduction

1.1 Background & The Research Problem

In Canada, social services are delivered through a contractual relationship between primarily government funders and CSOs on an annual or multi-year cycle; this dynamic creates organizational uncertainty and employment insecurity (SSLMRFP, 2020, p. 11). Provincially, CSOs are the primary providers of social care and leading employers, serving as "anchors" for many small towns, filling in the service gaps felt by residents (SSLMRFP, p. 53). Imagine Canada, a charitable sector research and advocacy organization, reports that in the next few years, the social sector will encounter a "$25 billion social deficit, leading to ever-growing waitlists and inability to access critical services across the country" (SSLMRFP, p. 84).

Executive directors set a nonprofit organization's strategic direction alongside their board, potentially influencing every organizational decision – from the monumental to the minute. Therefore, retaining qualified, well-suited leadership is critical to the sustainability of community services organizations (CSOs). A historical national labour shortage is underway (Statistics Canada, 2022), and a leadership deficit has naturally followed in the social services sector (Hunter & Decker-Pierce, 2021). This troubling issue is further complicated by rural, remote, and small urban communities' challenges in recruiting qualified candidates ("Social Services Labour Market Research Final Project" or SSLMRFP, 2020), and non-local candidates are scarce (SSLMRFP, p. 59). Additionally, the national housing shortage and affordability concerns impact rural communities (Cizek, 2023), leading to recruitment challenges. Indeed, significant leadership turnover is currently impacting CSOs locally, where 10 of the 18 Kootenay Boundary Community Services Co-operative ("the Koop") members have had a new executive director (ED) in the past three years, with several experiencing multiple transitions.

While executive transitions have long been considered a "watershed" moment for organizations (Tebbe et al., 2017, p. 339), the recent labour market landscape is shifting greatly as it grapples with baby boomer retirement (Froelich et al., 2011), and a dearth of identifiable successors (Geib & Boenigk, 2022; Hunter & Decker-Pierce, 2021). McKee and Froelich's (2016) American nonprofit survey of younger nonprofit workers found that despite an interest in staying in the field, only a measly 6% had aspirations to one day be an executive director (p. 590). Wolfred (1999) also observed a notable phenomenon: the average nonprofit ED only holds the position once, with a standard five-and-a-half-year tenure (cited in Santora & Sarros, 2001). While best practice is active and ongoing succession planning to contend with this recurring challenge, the typical dynamic is to recognize its importance in solid nonprofit board governance without taking further action (Geib & Boenigk, 2022; Tierney, 2006). The turnover rates imply that efforts to implement a culture and practices that guard against executive turnover are insufficient.

1.2 Project Research Question, Objectives, and Rationale

The impact of nonprofit executive turnover cannot be understated (McKee & Froelich, 2016). For several decades now, there has been a focus on the benefits of a shared leadership approach – its impressive ability to bolster team performance and creativity and improve team dynamics (Wu et al., 2020). This research turns its attention toward shared leadership's applications in executive retention in the CSO sphere. Understanding the role shared leadership and its contributing factors play in local CSO executive retention is crucial in stabilizing their futures and the communities they serve. Given the importance of strong executive leadership, gaining a deeper awareness of the factors that support ED retention regionally will enable the Koop to make informed decisions on its capacity-building activities. Most significantly, it will contribute to local CSO ED retention strategies, bolstering their organizational sustainability as they face an era of change with a strapped labour market and increased demand for services.

The research aimed to investigate a leadership model within CSOs that is more compatible with executive retention. It sought to address the research problem of high executive turnover, with a limited labour pool of candidates for the most critical organizational role. The guiding research questions were, **"Does shared leadership provide a protective effect in CSO executive director retention?"** and **"What influence do the various shared leadership constructs have?"**

1.3 Project Client and Deliverables

The Kootenay Boundary Community Services Co-operative ("KBCSC" or "the Koop") is dedicated to creating a thriving social services sector to improve the lives of those in the region (About Us, n.d.). For 21 years, it has been committed to its mission of "strength through connection" and continues to support its social services nonprofit members through the challenges of the day. The Koop's primary activities are to build capacity through training, facilitation, resource and information sharing, group buying, and promoting standards of practice. As a member-driven organization, their priorities guide the Koop's governance and activities. Over the past few years, much of its work has prioritized connecting and supporting executive directors within the membership. The Koop hosts several networks to build connections across CSOs; currently, the most active one is the Executive Director Network, which meets monthly, reflecting a shared desire for leadership support and peer mentorship in this often isolating and challenging role. The researcher is the Koop executive director, who has seen firsthand how executive transitions impact member organizations and how some CSOs have responded with a creative shared leadership model. The Koop is uniquely positioned to look at this capacity issue of preventable executive director attrition on a regional level.

The Koop also holds several program contracts, SKY (Safe Kids & Youth), a rural-modelled Child and Youth Advocacy Centre, and Nobody's Perfect Parenting, carried out by Koop member agencies. Lastly, the organization is the lead agency in implementing a hub-and-spoke-modelled Foundry, which will provide integrated youth services and is set to open in

2028. The programs are funded by various provincial and federal ministries. All programs lean on the Koop's strength as a regional coordinator and its strong relationships with member agencies involved in delivering many of these services.

The project deliverables include a brief report for Koop members with clear recommendations for ED retention success. Should there be interest, an accompanying presentation may be provided to participants and made more widely available. Additionally, local parties engaged in this subject matter (e.g., other sector umbrella organizations and a regional funder) will receive it.

1.4 Organization of Report

This report comprises seven chapters, in addition to References and Appendices.

- Chapter 1 provides the project introduction, including an overview of the research problem, client, and context.
- Chapter 2 covers the literature review, giving the academic context and an overview of the current scholarship to date on relevant topics framed by the study's conceptual framework.
- Chapter 3 describes the study's methodology and methods, detailing the research process and rationale.
- Chapter 4 presents the results and findings on executive director attrition, shared leadership and its constructs and other themes, summarizing the data collected through research.
- Chapter 5 outlines the findings on co-leadership models and their relevance to shared leadership.
- Chapter 6 discusses and analyzes the research findings. It organizes the data into theory and understanding.
- Chapter 7 includes recommendations, discussing actionable steps forward and possible strategies for the client and its members.
- Chapter 8 provides the conclusion, summarizing the research and future implications.
- References & Appendices

2.0 Literature Review

The literature landscape on shared leadership and its corresponding constructs is vast. In consideration, this review offers a broad overview, focusing on the literature most relevant to the research question, identifying gaps and notable findings on shared leadership and its constructs. The following concepts, referred to throughout the report as "constructs," have been identified as critical components of shared leadership in executive retention: trust, voice, perceived organizational support, team heterogeneity, and mission motivation. A sixth construct emerged through data collection – vision, which closely relates to mission motivation but is distinct and thus separate. Through the study, certain constructs became a more prominent focus in this research – perceived organizational support and team heterogeneity. Formal co-leadership (two or more executives leading a single organization) surfaced as an important manifestation of shared leadership as well. A survey of executive director retention and attrition literature starts this review off as it provides important context for the topics that follow. An additional review of succession planning literature can be found under Appendix O. As outlined in Figure 2.2. many of these constructs are interrelated, overlapping, and described slightly differently, depending on the researcher. The "Shared Leadership & Executive Director Retention and Attrition" conceptual framework (page 7) situates the body of literature alongside the resulting findings from this research. Overall, though, the nonprofit sector is understudied and leans on corporate work. Canadian CSO executive director retention and shared leadership impact studies are currently nonexistent in academic literature.

2.1 Executive Director Tenure & Attrition

Nonprofit executive director retention and attrition have yet to be exhaustively studied (Wanza, 2024, p. 17). The research question for this study emerged from the project client's observations. A literature review echoed leadership attrition trends; Wolfred (1999) found that the average executive will do the role only once in their career and stay for 5.59 years. Long tenures were studied by Santora and Sarros (2001) in a case study of three executives who remained in their roles for 25 years or more; results found these executives had three things in common: they controlled their boards, had a vision to grow their organization continuously, and exhibited passion that surpassed non-founding CEOs (p. 59). Indeed, the trend of founding executives staying in their role for exceptionally long tenures is well documented (Eitzen & Yetman, 1972; Hughes et al., 2010, as cited in Stewart, 2016, p. 45). CompassPoint's US-based succession planning survey revealed that of 28 charities, only 14% reported that their former CEO went on to another executive role (Allison, 2002, p. 342). As for repeat executives, Stewart's (2016) research interviews identified that there is likely a certain level of 'naiveté' needed to be willing to take the role at all (p. 54).

The flip side of long tenures and retention is attrition. McKee & Froelich's (2016) barriers and substitutes of succession planning study even named executive attrition as "a special consequence" of non-profits (p. 589). Researcher Einolf (2022) notes there are many reasons

leadership turnover in the sector is so high – from board conflict to skills gap to low salaries. Increasing demands on leadership include the need for diverse competencies (Norris-Tirrell et al., 2018) and a shifting landscape pushing for collaborative efforts, rapid communication, accountability, and transparency (Routhieaux, 2015), all the while dealing with a growing need for services with stagnant funding (SSLMRFP). Naturally, the sector suffers from a PR problem in that the industry has a "negative image," detracting from recruitment and retention efforts (SSLMRFP, p. 62). Honing in on causes of attrition, the recent provincial survey "Under Pressure: 2024 State of BC's Non-Profit Sector Report" revealed the top responses when organizations were asked how they were doing, were "overwhelmed" and similarly "stretched," "burnt out," "stressed" and so forth. It also noted the trend of increased wages, concluding that cost-of-living, burnout, and insufficient wages are on non-profits' radars (p. 19). The cost-of-living barrier to recruiting candidates outside an agency's community was reiterated in Cizek's (2023) thesis exploring the housing affordability within B.C.'s Nelson and Kaslo. It outlined the challenges smaller towns face in accommodating newcomers with low-supply and high-cost housing. Returning to the "Under Pressure" report, nearly half of respondents shared that resources for staff mental health and wellbeing are being increased (p. 20). Indeed, decades earlier, Ban et al.'s (2003) small-scale exploratory study outlined the "stress with the risk of burnout" present in this work (p. 149). Other possible reasons for executive attrition antecedents include executive performance and poor financial management, specifically found in small to midsize non-profits (Stewart & Diebold, 2017, p. 757). Carman et al. (2010) found 69% of executives studied were predicted to leave their roles in 5 years or less, and of those, half would retire. While some share their intentions in advance, many do not, impacting the organization's ability to plan (pp. 98-100). These topics are expanded upon under Appendix O.

Published within a month of the commencement of this study's data collection phase was Wanza's (2024) dissertation. It interpreted the high attrition levels observed within American social service non-profit leaders. Its scope overlaps considerably with this research. This article informed the term "executive attrition" when discussing their departure from their role, whether voluntary or involuntary. The dissertation's most relevant findings were the relationship between a strong motivation from leaders to serve the organization and mission, and "alignment and support" in a leader's vision of said mission and organization with their retention (p. 132). The "leadership style can impact attrition if relationships with employees are not authentic, relevant and encourage personal and professional development" (p. 133) – which concerns most of the shared leadership constructs that are explored within this study's shared leadership framework (trust, perceived organizational support, and voice). Wanza also found burnout and stress to be two leading causes of attrition which were impacted by non-profits' size, status, and funding (p. 133). Workplace culture was indicative of leader attrition, with cultures "[embracing] diversity, connection and communication" being less at-risk (p. 138) - which echoes the team heterogeneity construct. These findings underscore the need for further research and action in this area.

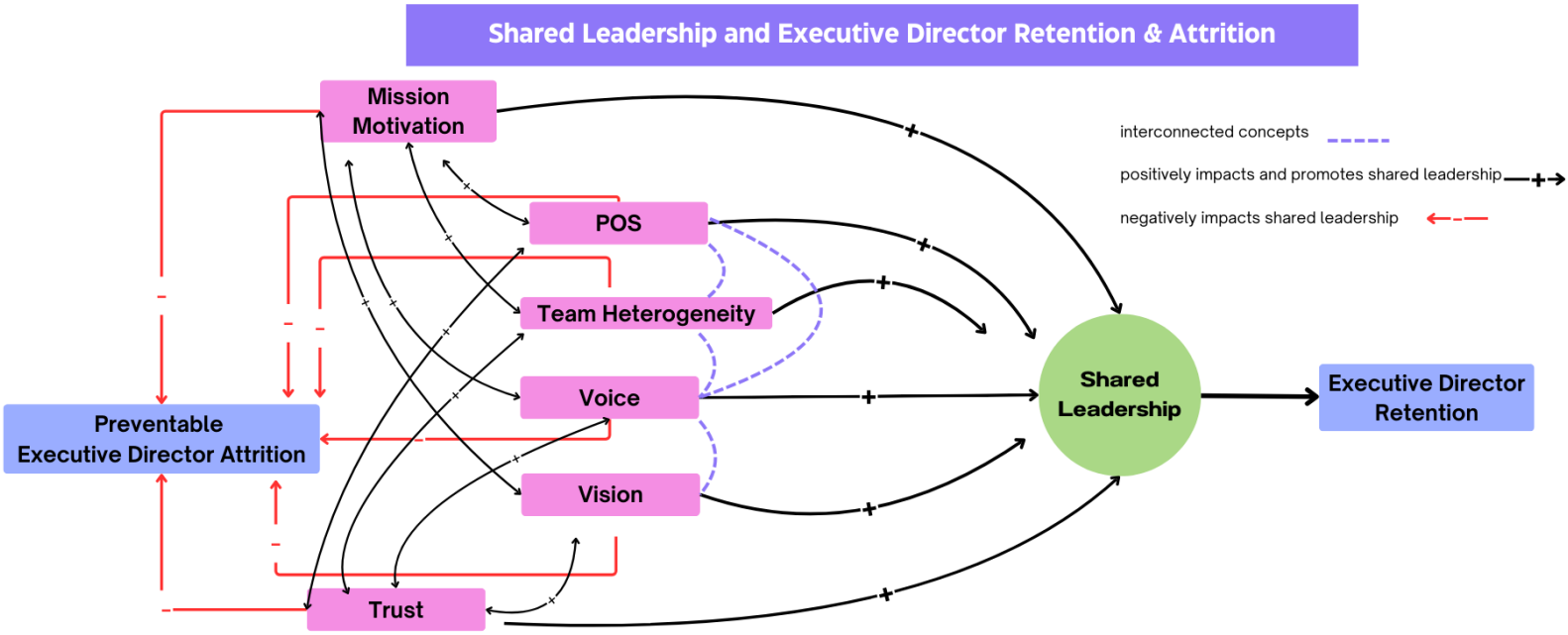
2.2 Conceptual Framework

Understanding the role shared leadership and its contributing factors play in local CSO executive retention is crucial for their futures and the communities they serve. Based on the literature review, the following concepts were initially identified as critical components of this research question: trust, voice, perceived organizational support, team heterogeneity, and mission motivation. Through the research process, the conceptual framework was refined, adding in the emerging construct of vision. While perceived organizational support (POS) and team heterogeneity are the focus of much of the study's findings and analysis, all contribute towards the creation of a shared leadership culture. As outlined below (Figure 2.2), many of these factors are interrelated, overlapping, and verbalized slightly differently by various researchers. Mission motivation and trust both have relationships with every other construct (other than vision with the latter). They are likely a sine qua non in shared leadership - foundational to its enactment. As the framework demonstrates, strength or positive levels in these constructs create shared leadership and subsequently support CSO executive director retention; the opposite is true that when these constructs are weak or at risk, ED attrition follows. POS and team heterogeneity are interlinked and show up as manifestations of each other in many cases. Similarly, voice and POS enabled each other and also were manifestations of one another (e.g., EDs felt supported when their voice was heard and the enablement of a culture with high levels of voice occurred when people were supported to express themselves). Another example of interconnection is between vision and voice (e.g., vision manifests when voiced, and voice becomes important when there is a vision to protect and nurture). Lastly, there is an interconnection between team heterogeneity and voice, as team heterogeneity is activated by diverse voices, and diverse voices can only exist where team heterogeneity is present.

See Appendix I & J for the draft and final conceptual frameworks.

Figure 2.2

Conceptual Framework: Shared Leadership & Executive Director Retention and Attrition



2.3 Shared Leadership

The literature on shared leadership is abundant, and even more so when investigating the related and, at times, overlapping terms (e.g., collective, distributed, connective, collaborative) (Pearce & Conger, 2003). Emerging in the literature over the past few decades, it has gained widespread interest (Wu et al., 2020). Shared leadership has many definitions. Pearce & Conger (2003), pioneers in this field of research with their eponymous edited book, have a clear definition of shared leadership that was used in this study, which rests upon the past contributions of social exchange theory, other leadership styles like emergent, and followership theory (Pearce & Conger, 2003). Shared leadership is "a dynamic, interactive influence process among individuals in groups for which the objective is to lead one another to the achievement of group or organizational goals or both" (Pearce & Conger, 2003, p. 1), another helpful description, from Pearce and Sims (2002) is "the 'serial emergence' of multiple leaders over the life of a team" (p. 176) or "decentralized decision making" (Routhieaux, 2015, p. 140). It is context-dependent and relies on the individuals' "potential" and the task at hand (Pearce & Conger, p. 53). An essential feature of shared leadership is that hierarchical team structures are not necessarily in opposition – they can coexist harmoniously (Pearce & Conger). Pearce & Sims' (2002) study posits that "vertical" leaders positively influence the degree to which shared leadership manifests within a team (p.184). What shared leadership is not is also worth defining. It is not a committee with a specified goal or task forces or shared governance models, though they can coexist (Holcombe, 2021, pp. 37-38).

Shared Leadership Benefits. Shared Leadership has been heralded as the antidote to the increasingly challenging landscape non-profit leaders face and an evolution from an antiquated notion of "heroic" or individualistic leadership (Freund, 2017, p. 13). The strength of shared leadership has been observed through its ability to reduce conflict, build greater consensus, and higher intragroup trust (Wu et al., 2020, p. 51) in addition to how it supports the process of succession planning itself (Geib & Boenigk, 2022, p. 75). Despite its increased attention, researchers have primarily focused on shared leadership's influence on employee attitudinal outcomes, employee behaviours such as helping, and organizational performance (Grille et al., 2015). D'Innocenzo et al.'s (2016) meta-analysis explored these performance outcomes; concurring shared leadership is associated with improved team performance in complex task contexts (Wu et al.). Shared leadership has been studied in relation to employee (not specifically executive) attrition in non-profits, the maximization of ideas, minimizing bottlenecks, and increasing and improving the quality of productivity, production, or processing times (Pearce & Conger, 2003, in Wanza, 2024, p. 15). Allison (2002) described a phenomenon of downplaying executive influence as non-profit cultures tend to value equality and participatory democracy (p. 347); this indicates a natural sector predisposition toward shared leadership.

Shared Leadership Constructs and Measurement Tools. Empirical evidence on shared leadership has grown in recent years (Wu et al., 2020, p. 51); internal environment antecedents are named as shared purpose, social support, voice and team characteristics of team

heterogeneity, intragroup trust, and more (p. 53). Wu et al.'s (2020) meta-analysis on shared leadership antecedents, consequences, and moderators greatly informed the framework for this study, which extends to the realm of executive retention. Klasmeier & Rowold's (2020) German study identified predictors and outcomes of shared leadership in the corporate sphere identified within the following constructs (p. 915). Grille et al. (2015) developed a questionnaire with robust statistical analysis, the Shared Professional Leadership Inventory for Teams, or SPLIT, to assess shared leadership, task relation leadership orientation, change leadership orientation (the degree to which leaders are seen as "agents of change and "transferring leadership dimensions to the team context (p. 78). While promising as a measurement tool, it excludes respondents' feelings, does not delve into attrition and retention, or allow participants to draw direct lines from the shared leadership constructs to predicted executive tenures.

Shared leadership in Nonprofit Contexts. Little shared leadership literature is specific to non-profit contexts (Routhieaux, 2015) or addresses how leadership outcomes like tenure and job satisfaction relate. However, Harris (2016) and Wanza (2024) provide a jumping-off point with their study of shared leadership – in the American faith-based higher education and human services realms, respectively. Its corollaries (values people, develops people, builds community, provides leadership, and displays authenticity) are associated with employee intention to stay with an organization, as in Harris et al.'s (2016) servant leadership study found in a faith-based higher-education study. In addition, Wanza's dissertation (2024) probes the reasons behind nonprofit executive attrition in the United States. Therefore, this study seeks to explore this gap in knowledge on shared leadership and its contributing factors to executive director transitions and role stability. The various shared leadership frameworks are helpful (Geib & Boenigk, 2022; Pearce & Conger, 2003; Wu et al., 2020) and have contributed to the concept model within this research, and as they are all looking to measure differing outcomes, like team performance, their factors have been amalgamated, omitted or selected based on their potential association to ED role stability. The constructs included in this literature review and the study's shared leadership conceptual framework are mission motivation, trust, perceived organizational support, team heterogeneity, voice, and vision.

Additionally, most studies are covered within the corporate or academic sectors with unclear transferability to the non-profit or human social services sectors. One example illustrating context's crucial role is Geib & Boenigk's (2022) research on positive non-profit succession planning outcomes and leadership continuity. Grounded in a shared leadership lens, the study stresses the importance of a human resource role, coining it "tripartite leadership." While informative and aspirational in its sophistication, access to a human resource specialist, let alone a dedicated employee, is still rare for most non-profits (Ban et al., 2003). A further exploration of succession planning is located under Appendix O.

Manifestations of Shared Leadership. Acknowledging its dynamism and coexistence with other leadership models, shared leadership is not a binary within an organization; we expect to find a spectrum of ways in which it manifests and many consequences on the EDs' trajectory within the

organization. Indeed, one such manifestation of shared leadership is the co-leadership model; Denis et al. (2012) explore co-leadership models in depth, positing that current literature does not consider the role of the formal leaders when "sharing leadership for team effectiveness" (p. 217). A further exploration of co-leadership literature is discussed in section 2.10. While the definition of shared leadership is clear, the way it shows up can be subtle, as Denis et al. (2012) described it as often getting "disappeared" (p. 267). Shared leadership displays may seem "unheroic" and "mundane," with examples including open, ongoing sharing and communicating appreciation for colleagues. (p. 267).

2.4 Perceived Organizational Support (POS)

Perceived organizational support (POS) is the general perception of employees "concerning the extent to which the organization values their contributions and cares about their well-being" (Kurtessis et al., 2017, p. 1855). Referred to as a "reciprocity norm," it creates loyalty as this concept increases employee engagement, "organizational identification," and overall commitment (Klasmeier & Rowold, 2020, p. 917). POS is an established corollary to shared leadership on the individual perception level (p. 923). These studies also suggest that leader engagement is critical to activating POS. Wanza (2024) connected this construct to retention, stating that leaders who felt "respected, valued, recognized for their skills and experience and contributions" were more stable in their roles (p. 168). Similarly, the "Social Services Labour Market Research Project Final Report" found "relatively stable retention" in workplaces where employees receive opportunities such as "robust mentoring programs, attractive extended benefits, mental health support, and a focus on transparency and communication" (p. 62). "Fair rewards" has been found to be a shared leadership antecedent ranging from financial rewards, career options, and job security to recognition from a leader and, notably, colleagues, creating "an incentive for active participation in work processes and initiative at the workplace" (Grille et al., 2015, p. 329). A further demonstration of POS was found in the coaching, mentoring, and professional development opportunities organizations provided. Fair rewards is further surveyed below, under "Remuneration".

Remuneration. The 2024 "Under Pressure: report on BC Nonprofits" stated increasing wages for staff in the sector locally, and 45% stated that more time or money is being put towards recruitment and retention, with similar figures on creating flexible HR policies (pp. 19-20). While there are ample results when searching for salary-related nonprofit retention, executive director-specific studies are limited. Reports from industry advocacy organizations fill in some missing details (Imagine Canada, Charity Village, Federation of Community Social Services of BC). In Wanza's (2024) study of American nonprofits, over 50% of surveyed leaders mentioned compensation as a driving factor for attrition, early resignation, or retirement (p. 156). The size of the nonprofits impacts salary competitiveness, with smaller organizations struggling more on this front; however, on a positive note, smaller nonprofits also provide more flexibility (Ban et al., 2001, pp. 146 - 148). The lack of salary competitiveness becomes more dire when looking across sectors like government and for-profit (Ban et al., 2003; Tierney, 2006; Vmokur-Kaplan, 1996; VonBergen, 2007; cited in McKee & Froelich, 2016, p. 590).

Professional Development, Coaching & Mentoring. Geib and Boenigk (2022) assert that the nonprofit sector is particularly weak in developing employees into leaders (p. 70). Wanza's (2024) study found an association between retention and professional development. Those with relatively stable retention rates spoke to the importance of creating an environment that supports and nourishes the growth and development of employees. Gothard & Austin (2013) tout the benefits of the former executive being "on call" for the new executive, which enables them to establish themselves as a leader but also have a line of support (p. 275). The *Social Services Labour Market Research Final Project* respondents reported being eager for more organizational support via education and training opportunities (p. 76). While not focused on executives, Carman et al. (2010) study asked young professionals if they had a mentor within their agency; the 40% that they did were "overwhelmingly positive about the benefits" (p. 104).

2.5 Team Heterogeneity

Team heterogeneity promotes shared leadership (Wu et al., 2020, p. 49). There are endless ways to classify individual differences; however, the research on shared leadership is on the measurable range in employee tenure, experience, functional and educational level, and demographics (e.g., age, gender, race) (Wu et al., p. 53). Hosch (2010) highlighted the "nonredundant" and "nonoverlapping" information that arises in heterogeneous groups (cited in Wu et al., p. 53). Drawing on diverse skillsets and knowledge can bolster an organization's ability to make and implement critical decisions (Routhieaux, 2015, p. 149). Allowing input from various team members inevitably promotes increased communication and collaboration to source viewpoints, thus creating shared leadership (Wu et al., p. 54). The modern-day CSO ED has a multitude of responsibilities and required competencies; team heterogeneity can remove individual pressures by preventing burnout and missteps arising from insufficient expertise or the effort invested in acquiring context knowledge to make a pivotal organizational decision. However, Routhieaux (2015) does caution that trust is essential for its implementation (p. 150). Wu et al. discuss "mutual influence" within diversity, providing fertile ground for shared leadership to flourish (p. 51).

2.6 Other Shared Leadership Constructs

Voice. Van Dyne and Lepine (1998) describe voice as "constructive change-oriented communication, participation in decision making, and involvement in key processes" (cited in Wu et al., 2020, p. 53). Klasmeier and Rowold (2020) relate the concept of voice to active involvement in shared purpose (p. 926). The ability for team members to freely share their voice is closely related to the concept of trust, which creates a safe space for "participation and input" (Carson et al., 2007, cited in Wu, 2020, p. 53). This concept also relates to team heterogeneity in its encouragement of the serial emergence of differing viewpoints. However, research does suggest that heterogeneity factors (e.g., age, tenure, gender) can impact voice negatively, depending on the context (Wu et al., p. 53). This again underlines that a commitment from leaders is required to enact these concepts. Routhieaux's (2015) examination of non-profit

succession planning and shared leadership found that complex matters require collective discourse, and to make a well-informed decision, it is best done by those impacted and is "decentralized" (p. 140).

Mission Motivation. Throughout the nonprofit literature, a deep commitment to organizational mission from executives is repeatedly observed (Ban et al., 2003, p. 146; Einolf, 2022, p. 231; Kuenzi et al., 2022, p. 53; McKee & Froelich, 2016, p. 3; Wanza, 2024, p. 132), to such an extent that its importance likely plays a primary role in the retention of CSO EDs. It is also called "task cohesion," or a commitment to a shared purpose or outcomes (Serban & Roberts, 2016). Within the shared leadership research context, it is a critical component in organizations achieving their mission and a pivotal contributor to shared leadership. Klasmeier and Rowold's (2020) work also supports shared purpose as an antecedent to shared leadership connected to POS.

Vision. The importance of this construct in ED retention via shared leadership emerged throughout the study's data collection process. Vision is deeply interconnected with mission motivation. Klasmeier and Rowold (2020) name this as well; their findings "[underlining] the importance of a highly active leader, who articulates a shared vision for the team, emphasizes common goals, and may therefore enhance collective identification." Santora and Sarros' (2001) long-tenured EDs study documents a "continuous vision" which relates this construct to shared leadership behaviours (p. 53). Wanza's recently published dissertation emphasized leaders' "vision alignment" to the mission as critical (p. 132).

Trust. Trust is established as a shared leadership antecedent by Klasmeier and Rowold (2020, p. 925). Trust is paramount in ambiguous contexts, where shared leadership is most advantageous (Costa, 2003, as cited in Serban & Roberts, 2016, p. 185). Chen and Zhang (2022) warn that shared leadership can be threatened by a "loss of 'psychological territory" when executive directors feel their authority is encroached upon (p. 59). Trust in a team's discretion, competency, and integrity all impact the level at which a shared leadership context can flourish, and potential risks can be mitigated (Klasmeier & Rowold, 2020, p. 925). Leaders must prioritize engaging in coaching, support, and adapting their actions (Freund, 2017). This requires trust in an organization's processes and people. Moreover, executive directors are unlikely to stay long in an untenable situation if they do not feel trusted to conduct their duties or of their staff. Stewart's (2016) study states that a trust fallout stemming from an executive dismissal due to impropriety was later associated with a "cautious, verging on micromanaging board" (p. 52).

2.7 Co-leadership and Formal Shared Leadership Models

Co-leadership, also known as "pair leadership" (Klinga et al., 2016, p. 2), typically involving dyads or triads (Denis et al., 2012), first gained attention in Heenan & Bennis' 1999 book 'Co-Leaders: The Power of Great Partnerships' (in Guiaya, 2022, p. 23). Denis et al. (2012) conducted a comprehensive survey of the co-leadership literature and related studies in 'Leadership in the Plural.' However, it is important to note that research is scarce on co-

leadership, particularly on how it relates to shared leadership (Thude, 2017, p. 217). Moreover, similar to the shared leadership literature gaps, most studies do not focus on nonprofits. Leadership dyads have been explored within healthcare contexts (Thude et al., 2017; Gibeau et al., 2020) and academia (Holcombe et al., 2021, p. 32). This is surprising as formal co-leadership models are common practice in numerous fields, with Denis et al. (2012) referencing newspapers in Norway, law firms in the UK, and famous examples such as Goldman Sachs and Google (p. 240). Authors Alvarez et al. (2007) add other large-scale corporations to this list, including Guess? Inc., Blackberry, IMAX Corp., and Merrill Lynch & Co. (p. 10). Regarding attitudes towards co-leadership in that sector, the 2002 *MassMutual Financial Group/Raymond Institute American Family Business* survey stated that 13 percent of sampled companies had co-CEOs and over one-third would consider the model in the future (Alvarez et al., p. 11).

Researchers highlight the potential benefits of co-leadership, emphasizing the importance of a collegial relationship and the diversity of expertise and job duties among co-leaders (Alvarez, 2007; Klinga et al., 2016; Silver, 2021). This diversity is synonymous to team heterogeneity. As stated by Klinga et al. (2016), the physical proximity of co-leaders can also be a significant advantage. In the healthcare context, Klinga et al. (2016) and Silver & Chung (2021) in the nonprofit sector point to the model's potential for increased executive accessibility, expanded scope and organizational stability, vacation coverage for executives, and faster decision-making in integrated service contexts (Klinga et al., p.5).

Despite all the potential benefits, Denis et al. (2012) caution against romanticizing this form of leadership (p. 273). As Gibeau et al. (2020) state, "co-leadership arrangements are not a panacea" (p. 484). Power dynamics among co-leaders have been studied, and an "[assimilation]…rather than balanced integration of competing demands" is a potential risk (Gibeau et al., 2020, p. 464). Guiaya's (2022) graduate paper adds to the discussion by looking at power imbalances surrounding co-leadership in the social work sector as it relates to social location (gender, race, ethnicity), which is an underexplored aspect of co-leadership (p. 26). Nevertheless, Gibeau's study of healthcare dyads found stability in the co-leader relationship dynamic (p. 484), whatever its expression.

Alvarez et al. (2021) examined 100 leadership examples, both successful and unsuccessful, and outlined key rules for effective co-leadership. These rules included choosing complementary co-leaders, investing in developing their relationship, establishing clear job descriptions, sharing a vision of accountability, and resolving disagreements privately (p. 14). Silver and Chung (2021) also emphasize the importance of clear communication, dispute resolution, and shared values in making the co-leadership model work (p 10).

2.8 Conclusion

This study explores a handful of concepts related to shared leadership and executive director retention from the research to date. While this corpus of literature has greatly informed the direction and analysis of this research, it is worth repeating that very little academic literature connects the main concepts of the research premise – shared leadership and executive director

retention in CSOs. The context of studies examined also varies dramatically, and there is no deep well of works to draw upon with complementary settings to this study's (rural, remote, small cities in western Canadian community social service organizations/nonprofits) but rather adjacent with threads to sew into a tapestry of burgeoning understanding. Ultimately, the literature review provides promise in the study subject matter, encouraging exploration into the mostly unchartered research area of shared leadership and CSO executive director retention.

3.0 Methodology and Methods

3.1 Methodology & Project Timeline

The research aimed to gauge the impact of shared leadership on local CSO executive director retention. As an employee of the project client, the Koop, the researcher conceived of this topic after witnessing the phenomenon of widespread executive turnover and repeated discussions on the numerous challenges that come with the CSO executive director role with client member agencies. Due to the context specificity required for the project client, in-depth data collection was required. Thus, qualitative interviews were employed.

The study was split across two periods – the first assessing the research problem, conducting an initial literature review, writing the project proposal, and securing Human Research Ethics Board approval (Ethics Protocol Number, 23-0296). This occurred before the researcher took parental leave in the Fall of 2023. In the secondary portion, project work was resumed in May 2024; interviews and data analysis were conducted, followed by a revisitation of the literature review, focusing on the study's emerging themes. The project report was written in the Fall and Winter of 2024, and research ethics approval was renewed in September 2024, though no further data was collected thereafter.

3.2 Methods

This study employed the following methods: a two-part literature review, semi-structured interviews with critical incident questions, and analytic memos. As noted above, the literature review occurred in two phases: before and after the data collection. The search parameters were expanded during the latter phase, exploring emerging themes such as "vision" and "co-leadership," which had surfaced. Below is an overview of the search parameters and methodology used to conduct the review. In order to locate relevant literature, the UVic library database and Google Scholar were searched using key terms. *Nonprofit Management & Leadership, Nonprofit Quarterly*, the *Canadian Journal of Nonprofit and Social Economy Research*, the *Journal of Management and Leadership Quarterly*, and the *Journal of Nonprofit Education and Leadership* were reviewed for topical readings. Recent literature was prioritized, with most sources dating from the last 25 years. Geographical, sector-specific searches (e.g., "human services") were included, though they often yielded no results. American and German contexts had the most topical literature. Grey literature from sector experts, including Imagine Canada, Vantage Point, Federation of Community Social Services, and Charity Village, was also sought. These sources provided a Canadian nonprofit and social services context to complement the literature search. Keywords in various combinations used included: "nonprofit," "executive director," "CEO," "shared leadership," "leadership dyads," "co-leadership," "vision," "perceived organizational support," "trust," "mission motivation," "voice," "team heterogeneity" "succession planning," "retention," "turnover," "attrition," "Canada," "British Columbia," "Kootenays," "Boundary," "isolation," "burnout," "tenure," and more. When reading relevant articles, references were scanned and searched for additional information.

Semi-structured interviews with a sample of 25 participants was the chosen research method due to the versatility and ability to generate rich data from lived experiences related to key research concepts (Einolf, 2022, p. 232; Galletta & Cross, 2013, p. 24). Additionally, this method invited the emergence of new themes throughout (Rossman & Rallis, 2003, p. 181). The interview questions explored shared leadership constructs from various angles (e.g., ED-board trust, ED-staff trust) and recommendations from the interviewer to other agencies. Critical incident questions were asked to best reveal participants' views and values from salient personal experiences (Best, 2014, p. 103). Critical incident questions attempted to take interviewees from theoretical to reality. The interview guides grouped questions by concept theme and demographical questions. An example is the questions on perceived organizational support (see Appendices C through E for the full Interview Guides). Rather than asking, "Do you feel valued by your organization?" participants were asked, "Can you tell me about a time you felt particularly valued by your organization?" and then the opposite, about a time they felt undervalued. This avoided "yes/no" responses, and the incidents the participants chose to share indicated how they interpreted the construct in their context. The concept questions were followed up with a more general question, bridging the theoretical and experiential after participant reflection. An example is "Do you have suggestions for promoting this supportive culture for executives? For their staff?"

The interrelatedness of the concepts unintentionally led to a wealth of data and often provided telling examples from questions on seemingly unrelated topics. Analytic memos were written post-interview, capturing main themes, an overview of how shared leadership concepts manifested for interviewees, relevant executive retention and tenure details, and subjectivity reflections from the interviewer. Several interviews were conducted in person (with Zoom still recording a transcript), though the majority were over Zoom. Recorded interviews and transcripts were stored on the researcher's password-protected computer and backed up on a password-protected flash drive.

These methods supported the creation of an "informed narrative" and, while subjective, are instructive and have the ability to inform those in similar situations in the future (Best, 2014, p. 105). Within this type of qualitative research, the researcher's reflexivity plays a critical role - they can even be considered an instrument themselves (Galletta & Cross, 2013, Chapter 3, p. 104). In consideration of this, the researcher created analytic memos post-interview. See Appendices C-F for the interview guides and Appendix G for the analytic memo template.

3.3 Sample & Participants

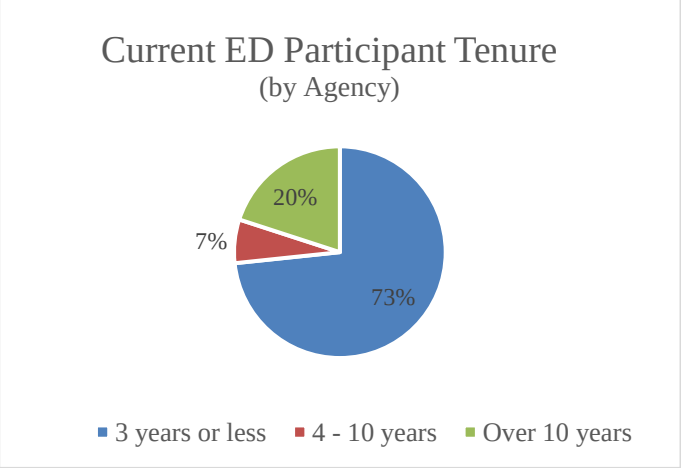
Participant selection criteria included current and past executives or staff leads (in solo and co-leadership roles) at member organizations. Additionally, board members from agencies were also approached. The project client was also invited to provide a staff and board perspective. The client provided a contact list of Koop member organizations, including the agency's executive director or staff lead and board contact. Participants were contacted via email

(see Appendix A) from May through July 2024. Board contacts were solicited for participation or asked if another board member would be better suited to discuss the research topics. Several contacts were messaged via LinkedIn (with a similar message to the email (Appendix A) as they met inclusion criteria but were not in the list provided by the client. One to two follow-up emails or messages were sent to those who did not respond. 25 out of the 35 individuals contacted opted to participate.

Participants were provided a written consent form (see Appendix B) via email to review and sign before their interview. An overview of the consent was also read aloud and verbally agreed to before each interview (see Interview Guides, Appendices C-E). 25 interviews were conducted with 15 Koop members and the client organization itself. Respondents were Koop member organizations' executive directors (current or past, permanent or interim, solo or co-executives), board members, and several key project client representatives. The interviews assessed the reasons for executive director attrition, retention, and shared leadership cultures. The participant organizations were diverse, with budgets ranging from less than $250,000 to over $4 million annually and staff numbers of less than 15 to over 50. These agencies were all well-established, each providing human services, although their programming and regions varied. Geographically, they were based in the Koop membership areas, including small cities and village communities in the Kootenays, Boundary, and East Central regions of British Columbia. The organizations had a variety of staffing environments, from union and non-union to mixed, and were primarily government contract-funded. However, some received more funding via grants and charitable donations.

Executive participants ranged from one year of experience to decades in the role. The mean executive tenure was 4.2 years, but the mode was approximately one year (see also, Figure 3.3). Several repeat executive directors were interviewed, but respondents were mostly in their first executive role. The overwhelming majority were promoted from within the organization, with very few moving to the agency's community for the position. Seven out of 15 EDs entered their role in a "challenged leadership context," meaning that their predecessor had been let go, left abruptly, the organization had been through a public controversy, or experienced serial ED attrition (defined here as more than three EDs in the last five years).

Figure 3.3
Current ED Participant Tenure, By Agency



3.4 Coding & Analysis

Recorded zoom transcripts were reviewed for accuracy and further exploration. A combination of deductive and inductive coding was used, and several new relevant themes arose throughout the interview process. Incorporating critical incident questions and recommendations for other agencies was a way to gain additional vantage points on an interviewees' perspectives. Analytic memos provided a high-level overview of the shared leadership dynamics and the most salient aspects of the interview. This started the process of pattern detection across interviews and flagged unexpected results. The transcripts were coded and subsequently transferred to an Excel sheet. These codes were sorted by participant and then grouped by parent code (e.g., the code of "goals for the EDs agency" would fall under the parent code of "vision"). Recurring patterns and unexpected findings were further explored. Then, the data from organizations with multiple interviewees were compared for reliability. Constructs were assigned a rating – "High," "Mixed," "At Risk," "Developing," or "Unclear" (see Appendix H). Following this, the predicted ED length in the role was compared to shared leadership ratings and its individual constructs to identify if a relationship between the two existed. Finally, the results were compared across organizations to see if the patterns were consistent.

Data in this report is presented by interviewee and by an organization to show the connection between shared leadership cultures and predicted and past ED tenures. Executives or board members from organizations were interviewed, and in some cases, both types of representatives from the organization were interviewed. Data was presented by comparing forecasted ED tenure to shared leadership constructs to illustrate the relationships better. Tenure and predicted attrition were probed to provide a more fulsome view of the research question.

Where potential risk to interviewees' employment, volunteer role, or interpersonal relationships was present, anonymity was prioritized in deciding how and if to present data. As such, the data is disaggregated (for example, the current and expected tenure of executives are not presented together, nor are the size of their organization and preventable attrition risk assessment).

3.5 Strengths and Limitations

Limitations of this research include the participants' willingness and availability to be interviewed and their comfort candidly discussing organizational and interpersonally sensitive information. To mitigate this factor, the researcher regularly communicated confidentiality to participants. A challenge was recruiting executives with shorter tenures who had already left their CSO executive roles despite the researcher's efforts to solicit participation. This was not surprising, as those individuals were no longer professionally engaged with the project client or the member agency and may have left under strained conditions. However, those with particularly short tenures likely could have provided valuable data.

A gap in this research is that failed co-leadership models were not included. This study also did not include dyad or triad models where one co-leader was replaced, which could upset the leadership dynamic. Roughly half of the participating organizations had board members and staff (ED/Former ED, Interim ED, Staff Lead) participation. Therefore, triangulation of interviewees' responses was not always possible.

While the methodology was informed by literature and the research question, this is not a statistical analysis, nor did it use an empirically tested measurement tool which could have provided additional perspectives on the research topic. Interpreting these concepts was challenging; while putting a numerical score on a construct may have been neat, the methodology did not incorporate it for scope, a lack of appropriate tools, and a potential loss of nuance and detail. For similar reasons, the research did not include a content analysis of standard markers of organizational success (e.g., operational budget, number of clients served, team growth).

This method involves participants' self-reporting, bringing their inherent biases and blind spots. However, this study is focused on key informants' perceptions and values and respects their expertise. In addition, the researcher's subjectivity is a potential limitation, though specific measures like writing analytical memos promoted a reflective research practice. Additionally, the researcher's pre-existing professional relationship with many participants, such as the project client's executive director, is a consideration. It was likely a strength rather than a hindrance, as it provided a pre-established rapport with participants and a contextual understanding of interviews. Notably, the data collection portion of the research was conducted entirely while the researcher was on parental leave, potentially minimizing the impact of concerns around anonymity while retaining familiarity with many interviewees.

This study's delimitations are that it represents perspectives on executive retention and shared leadership constructs at the time of data collection rather than a longitudinal study. The concepts explored are dynamic and have the potential for the interviewees' perspectives to shift depending on the interview timing. The scope of the interview questions was bound by a reasonable time limit (90 minutes maximum) to respect the interviewees' availability and to make the data synthesizable within the constraints of this research. The sampling of CSOs is determined by membership in the Koop and their availability and feasibility; therefore, regional research may not be generalizable.

4.0 Executive Attrition and Shared Leadership Findings

This chapter captures the study's results, grouping them into themes. First, the themes are summarized, followed by an overview of the participant demographics. Executive director retention is then related to all shared leadership constructs—perceived organizational support (POS), team heterogeneity, voice, mission motivation, vision, and trust. However, POS and team heterogeneity received the main focus as they showed the greatest variation and amenity toward activating shared leadership. The findings on co-leadership are also explored in depth.

The central themes emerging from this study were: 1) preventable ED attrition was found to be a risk to one-third of Koop organizations, 2) a consistent shared leadership culture (with a solo executive or formal co-leadership structure) was associated with higher predicted executive tenures by EDs and board members, 3) breaches or weaknesses in shared leadership were associated with lower predicted ED tenures and 4) every interviewee expressed current executives as having high mission motivation. Therefore, the hypothesis that a shared leadership culture may be protective against ED attrition is supported.

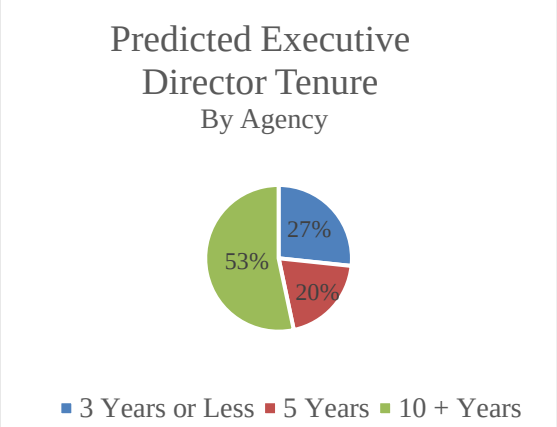
Through the interview process, it quickly became apparent how interconnected constructs were. This was predicted in the initial conceptual framework and reinforced through data collection. The conceptual framework (Figure 2.2) demonstrates this, along with interview quotes shared throughout the following sections.

4.1 Executive Retention and Attrition Findings

Current executives were asked how long they saw themselves staying in their role, and board members were also asked to predict the tenure of their agency's executive(s) (see Figure 4.1). Throughout the process of this research, several executives went on leave, and one even left their position. Approximately half of the organizations predicted executive attrition in the next few years, with three for nonpreventable reasons (e.g., retirement, family circumstances). The predicted mean ED tenure was 6.3 years, with five years as the mode. Co-leadership models anticipated exceptionally long tenures (10+ years as the mode). Only a few EDs indicated interest in doing this position again at another agency. As one newer executive shared:

Figure 4.1

Predicted Executive Director Tenure, By Agency



> It's incredibly inspiring when people manage to stay in these positions, and I look at all these amazing role models, and I have no idea what their secrets are… I'm such a baby in

> this role… [As an ED,] you're like the pillar…in the middle of the ocean…you're holding too much.

When asked what their thoughts were on Santoro & Sarros' (2001) finding that the average executive of a nonprofit stays in their role for 5.5 years and only holds the position once, there were various responses. Some thought it was short and really not ideal for the agency as onboarding is such a large investment. An executive director reflected:

> When you think about how slow relationships take [to build] trust…just to get to know staff and clients….it seems like it would take at least 2 or 3 years to even get the real pulse of the organization.

Only one board member brought up the question of whether retention was inherently positive, thinking eight or nine years would be the ideal for a high-functioning executive. Another board member countered this, stating, "If everything is running well under their direction, I don't think there should be a time limit on that." The trend of a founding director being in the role for decades was common for many organizations. As one interviewee shared, "we had one who [ED] basically started the agency and was doing it for [decades]. And then turnover, turnover, turnover, turnover." Most organizations surveyed, however, were well past their founder days. Therefore, this phenomenon did not impact most current predicted tenures for EDs.

When asked why the former ED(s) left their organization, a third attributed it to a breach in a shared leadership construct. Over half of the current EDs had considered leaving at various points because of a breach associated with one or multiple shared leadership constructs. The following section discusses the effects of shared leadership constructs, presence, and absence, preceded by the findings surrounding how preventable ED attrition manifested in interviews.

Attrition Causes. The "unsustainability" of the executive role was repeatedly shared, with potentially preventable executive attrition attributed to burnout stemming from stress, heavy workload, compassion fatigue, and isolation (see Table 4.1.2). The increasing demands on CSOs, the pressure from the community, the complex parts of their job that EDs feel wear them out and they are ill-prepared for, and, in extreme cases, threats to the ED's safety all contribute to this. Another factor attributed to ED tenure was the changing times, meaning the expectation for employees to stay with the same employer for decades no longer exists.

Table 4.1.1

ED Role & Challenges to Retention Key Quotes

Theme	Quote
Executive Director Role and Challenges to Retention	*There's something inherent in the [ED job] that makes…[it] unsustainable, unenjoyable - too much work, not enough support, not enough money to make things happen…People don't want to step forward into that. And it's…a shame…I think...we're gonna have some real consequences. We are probably already seeing them… It's not good for communities*. – Longtime, repeat ED
	"Executive directors are being asked to do more with less…You either…do more with more, or do less with less." - ED

Table 4.1.2

Risk of Attrition Type – By CSO

Attrition Type	**Number of Agencies at Risk of Losing ED(s)*** *(out of 15 surveyed)*
Burnout/Workload	5
Isolation	1
Retirement	2
Family/Health Emergency	1

One longtime executive summed up what many interviewees also shared, "There's something inherent in the [ED job] that makes…[it] unsustainable, unenjoyable - too much work, not enough support, not enough money to make things happen" (full quote in Table 4.1.1). A new executive shared an oft-repeated outlook that burnout in executives is a forgone conclusion, "What I keep hearing, though, is like this job will burn you down, and you'll be done within ten years." Another new executive was currently in the midst of it, reflecting the "burnout is…really intense and… it's just not something that you can just like fight through, and then, like, get over." A further ED described burnout in executives as "endemic." Another ED interviewee discussed the pattern of executive turnover at their agency because "the workload was too much. Too big a staff, too diverse programming, and too many meetings for one single person…And so the role [comes] with a lot of stress."

Workload. A perceived Sisyphean workload was also a common theme, as one ED interviewee shared, "leaving at the end of at last a week, feeling like, I got some things accomplished...but now there's double the amount of things that have been added to the list." Several executives reflected on the number of staff they oversee; one put this challenge in perspective by

referencing best practices within the field; “If we look at it from a clinical standpoint, you would never have supervision for more than seven people. That’s kind of your max…So how do you have an executive director responsible for [directly supervising] 40 people in a building?” Another ED described the workload as simply “exhausting.” One board member pointed towards widespread exhaustion in the aftermath of COVID-19 after “incredible effort” by executives to get their organization through the pandemic.

Insufficient Breaks. This unsustainability also stems from a sense that many EDs cannot truly take time away; one board member chalked it up to them being inherently “workaholics,” though multiple EDs shared anecdotes of being away and a crisis hitting that required their support. Additionally, a solo ED with an experienced team shared that they enjoyed taking a break but knew they would almost definitely “pay for it later” with a heavy workload upon return. They also felt guilty imposing their workload on a colleague. Several interviewees reflected that EDs can be vulnerable to becoming martyrs within their role. However, regardless of the level of agency executives felt, the stakes are incredibly high with human services work, and the weight of that responsibility was described as a lot for EDs to absorb. One interviewee brought up compassion fatigue, and another that there’s this “expectation that the social services are supposed to take care of everybody.”

Harm to Executive. In several cases, examples of harm to the executive or their staff were identified as potential reasons for leaving. One ED shared that a former employee was violent in the workplace and then harassed them outside of the office. Another leader reflected, “The staff regularly experience a variety of microaggressions, and sometimes…more than that [from clients].”

Job Pain Points. When asked what their area of weakness or least favourite part of their job was, almost all executives answered in one of two ways - human resources or “HR,” more specifically, addressing disciplinary issues with staff or financial management. One executive stated, “I’d be happy if I never had to do anything HR again in my life.” Another described how this area can be all-consuming.

Changing Times. Interviewees remarked on the “changing times” and that executives may now have a different outlook on career trajectories. While there is a past trend of longtime EDs, several interviewees reflected that the younger generation has a different view on work-life balance, and loyalty to organizations may be shifting. A longtime ED echoed this trend, “You don’t expect somebody to come and stay for [decades]…it doesn’t happen [now]…it’s like that in all fields. I’m not saying young people are not loyal or committed, but they look at it differently.” A further experienced ED reflected on why the younger generation feels differently today and hypothesized why their contemporaries had long tenures, “The reason was because the work…wasn’t well paid, but…it was interesting. The contracting was pretty creative at the time [and] we had good relationships with funders… and the collegiality between [local] EDs.”

With all the exposure to burnout, compassion fatigue, high workload, the challenging parts of the ED's job, and a sense of great responsibility, a longtime ED shared, "The thing with the nonprofits [ED is] you are the top. So, it's a very lonely place."

4.2 Shared Leadership and its Constructs

The following section describes the study's findings of shared leadership cultures, broken down by individual constructs – focusing on perceived organizational support and team heterogeneity, then providing an overview of voice, mission motivation, trust, and vision, the last construct emerging through the data collection process (see Appendices K-N). The shared leadership construct ratings assessed by agency can be seen in Figure 4.2.1. The overall shared leadership rating was compared to the predicted ED tenure below (see Table 4.2.1). Organizations with a demonstrated shared leadership culture were associated with longer predicted ED tenures. Shared leadership scores predicted EDs' planned tenure more so than their current length in the role. When asked outright, "Have you ever considered leaving?" or "When have you felt unmotivated in your work?" executives reflected on an interpersonal dynamic or a time when a shared leadership construct had been breached or at risk. Also observed was that these instances were not necessarily static, as multiple EDs expressed feeling that they had moved on from this chapter and recovered from the breach. Others, however, experienced a pervasive challenge in a particular area, leaving them at a higher risk for attrition. Interviewees readily cited examples of the importance of these questions to workplace well-being. The impacts carried into their personal lives and, uniformly, the mantle of responsibility that comes with the executive work showed through. An illuminating overview of key themes is found in the quotes in Table 4.2.2 below.

Executives who expressed working at an organization with a high degree of trust, POS, and team heterogeneity (even if it was only developing) self-reported as more immune to early ED attrition when controlling for founding ED phenomenon (that they generally have reliably long tenures) (Santora & Sarros, 2001, p. 57; Stewart, 2016, p. 45). Organizations with "mixed" shared leadership cultures predicted a median tenure of approximately five years. Organizations identified as "at risk" in one or more of team heterogeneity, POS, or trust predicted an ED tenure of 3 years or less, whereas those with high levels of demonstrated shared leadership in those three constructs predicted 10+ years with their executive. Mission motivation and voice were almost entirely high across all organizations. There was no clear pattern between shared leadership cultures and organization size, age, or budget except regarding remuneration (under POS) and team heterogeneity.

Table 4.2.1

Shared Leadership Rating & Predicted ED Tenure

	Shared Leadership Rating

Predicted ED tenure *(by organization)*	**Developing**	**At Risk**	**Mixed**	**High**
3 years or less	1	2		1*
5 years			2	1
More than 10 years			1	7

** ED may leave in 3 years or less due to nonpreventable reasons (e.g. retirement or family emergency).*

Figure 4.2.1

Shared Leadership Constructs – By Organization

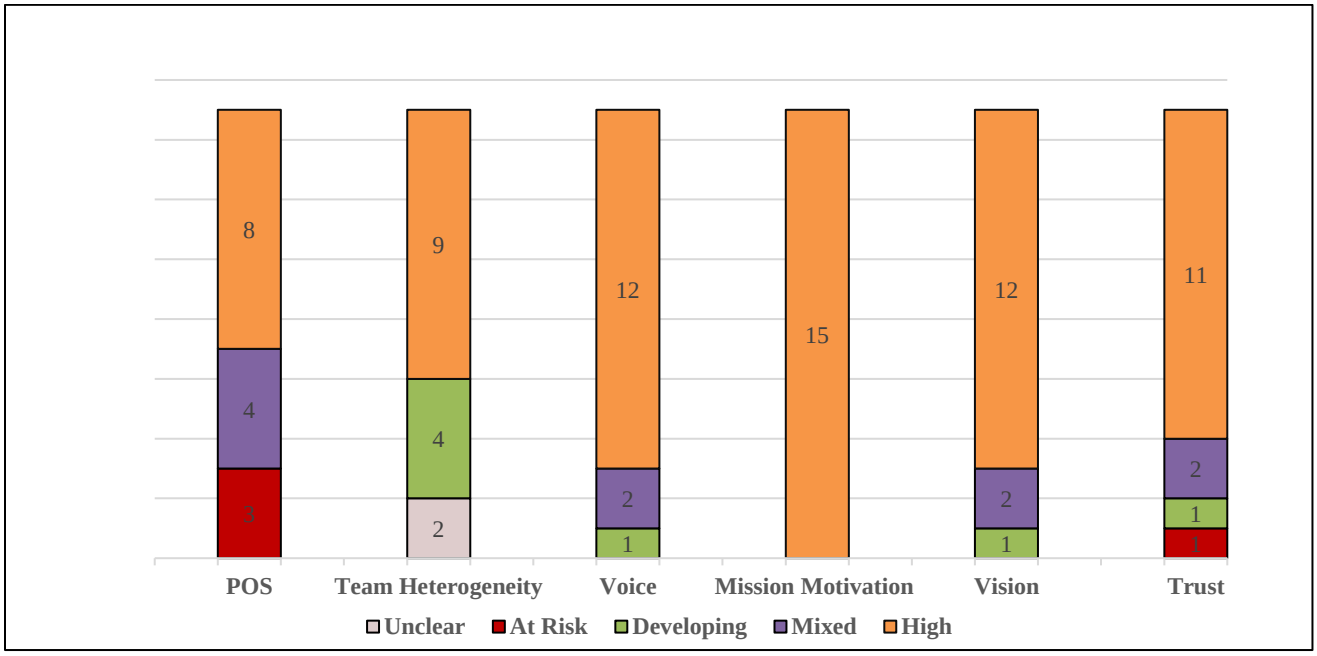


Table 4.2.2

Shared Leadership Quotes – By Construct

Construct	**Quote**
Perceived Organizational Support (POS)	*"What is really important is supporting your ED to ensure that they take enough breaks …that they have enough support within their agency [and] adequate staff to carry out the jobs."* - Board Member *"Don't be afraid to pay [executives] at the highest level [of] what you believe your ED should be paid based on annual assessments...I worked in business for many, many years and …it costs you a lot more to go… out and recruit somebody than to give them that small percentage to keep them there and make them happy."* - Board Member

Construct	Quote
Team Heterogeneity	*"My decision-making a lot of the time or most of the time is based on input from others."* - ED
	"The ED has to be humble enough to know that your employees have skills that you don't have." - ED
	"There's stuff I really don't like doing. … I can't trust myself sometimes…We don't have the resources to help support me. So, I'd rather stick to something where it's like, I know I'm good at…And that's what would make me want to not be an ED again… There's just so much to learn and...you have to make these really big decisions." - ED
Voice	*"We can always agree to disagree. But that's all the time. Like, and that's part of the reason why I like the [team structure], often I'll throw [an issue] out to the team. And…we have to vote…At the end of the day they know I'm responsible and if I veto, I can choose to do that, but I think I've only ever done that once."* - ED
	"*I felt undervalued because…my opinion didn't have the impact that it should have had. And my knowledge of the situation wasn't regarded as valuable as I thought it should have been."* - ED
Mission Motivation	*"There's always challenges. It's one thing after another…for you to stay in that role, you have to feel connected."* - Project Client
	"I think I would have left a long time ago if I didn't believe in the mission, and I love this organization." – ED
Vision	*"I think the thing that keeps you sort of hanging on sometimes is the whole idea that there's some things that I want to accomplish that I haven't accomplished yet."* – ED
	"My concern…was that…if I wholeheartedly support this movement, how badly is it going to damage the organization?" -ED
Trust	*"I think the degree of trust is quite large. [The board] had a lot of trust in me to kind of take this leap of faith, and let me take on this position to begin with."* -ED
	"That was…a big part for me and that made it easier…and kept me there because I could go to these people and …once they really started to see and trust me and believe in me, then…there was such a wealth… of knowledge coming from folks because they've been through it… they've seen it the organization change. Some were here from the very start of it, [for decades]." -ED

4.3 Perceived Organizational Support (POS)

Table 4.3

Perceived Organizational Support & Predicted Executive Director Attrition

	POS Rating				
Predicted ED Attrition in Next 2 years	**Unclear**	**At Risk**	**Developing**	**Mixed**	**High**
Yes - potentially preventable		3		1	1
Yes - likely unpreventable*				1	3
No				2	4

Perceived Organizational Support (POS) was high in just over half of the interviewed agencies. However, four were "mixed," and three out of 15 organizations were "at risk" – the most of any construct measured (see Table 4.3). Interviewees experienced POS in many ways – from formal planned employee recognition (e.g., work anniversary celebration), but most commonly, positive feedback and compliments, as a regular practice embedded within the board and employee culture. Some other examples interviewees shared included alleviating their workload (hiring support staff, managing project scope, etc.), helping leaders to reinforce healthy boundaries, fair remuneration, flexibility to promote work-life balance, and when medical and family emergencies arise.

Addressing Job Pain Points and Burnout. The aforementioned "job pain points" in (HR and finance management), were often related to how executives assessed their POS. For example, several executives experienced a high administrative workload and shared that their board addressed this by approving the hiring of an assistant, resulting in the ED feeling greatly supported. In another case, where an administrative position was downsized for budgetary reasons, the executive felt quite the opposite. A board member echoed its pivotal nature in preventing EDs' potential burnout with support staff and taking vacations. That same interviewee also identified the need to enforce boundaries for the organization, not leaving the ED alone to do so. Another ED further stressed the importance of genuine vacation that is not interrupted with work throughout to prevent overwhelm and burnout.

Peer Networks and Professional Development. Other forms of support described as critical were peer networks, like the Koop, and receiving mentorship (both formal and informal). A longtime repeat executive said they think these networks can save EDs "from the brink." Executives and board members highlighted the importance of investing in the EDs' professional development to support their growth and reinvigorate them. Executives' family and health emergencies also came up as a reflection on the level of support they sensed receiving – from time off (paid and unpaid), and the level of understanding they received was a pivotal moment for executives. It could threaten retention or foster renewed loyalty and mission motivation.

Another important subset of perceived organizational support arose from the development opportunities executives did or did not receive. New executives interviewed often brought up their level of experience. Additionally, poor onboarding was mentioned as a way they felt unsupported and isolated; several executives described stepping into the role and not having the critical documents required to do their job, like contract agreements or agency budgets. The interviewees found their way with varying degrees of support. One ED shared, "That's when I realized, oh my God, I have no idea what I'm doing. Because it was never told to me." Another stated, "Being new to this role, you kind of second-guess yourself sometimes." Several longtime EDs also attributed the importance of a trusted advisor to coach them, finding strong support in a board member, one describing weekly check-ins, another making themself available for coffee chats or a call whenever the ED needed it. Only a few executives discussed currently mentoring staff members as they look towards their departure. They also lamented that many employees were not interested in the executive track, which was in keeping with the literature (Einholf, 2022, p 245; Hunter & Decker-Pierce, 2020, p. 32; Mckee & Froelich 2016, p. 590)

Agencies with high overall shared leadership ratings also tended to report more frequently deriving support from their colleagues, and especially in co-leadership models where that was the strongest perceived support source. One described their co-leader as a natural confidant since the context is shared, disclosing sensitive information does not pose a risk to their organization's reputation, and no power dynamics are present as equal-titled colleagues.

POS – At Risk. Lacking POS showed up in a myriad of ways for agencies – from a pivotal event to the more mundane general sense of a lack of appreciation. One ED expressed, "I can…talk about my personal experience [over the decades]. There was a lot of concern for employees, but not the ED." Another interviewee echoed this: "It's a hard job, and I don't know that [executives] really get a lot of commendation or pat on the back for the work they're doing." Another example of lacking support that put an ED at risk for isolation came in the form of a disengaged board. The executive shared, "On the board…there was no support…I couldn't…call that chair and say, 'you know, this is what's happening'…I just didn't feel supported enough, and I was walking around blind." Additionally, several newer EDs expressed difficulty asking for the help they needed.

While colleagues were sometimes the greatest source of POS, in others, they could be a barrier. A few EDs shared that they felt they were challenged by staff who prioritized personal petty concerns over the organizations' wellbeing; one ED said they sometimes felt like the "complaints department." A further ED shared about a time when staff deliberately sabotaged an initiative they did not like. These situations left the EDs feeling burnt out and isolated. An ED who expressed their plan to leave in the near future stated, "I'm pretty confident in…my skills and…ability to grow and learn and take feedback. What I'm not confident in is my capacity to continue on very low resources." Another shared this under-resourcing dynamic as a reason that they likely will not take another ED role, and are thinking they will leave the role in the next few years as well.

Remuneration. Remuneration falls under "fair rewards" within the POS construct, and this topic came up in many interviews despite pay not being a direct interview prompt. While it was a point of contention and a potential threat to executive retention for some, it was not the largest. 17.6% of executives described their low wages as a strain on them and their ability to stay in the role, which differed from the 50% found in Wanza's research (2024). Consistent with Ban et al. (2003), the EDs who expressed low wages threatened their retention were also employed at small and mid-sized agencies (p. 146). However, similar-sized smaller organizations did not uniformly share this challenge. Furthermore, poor remuneration was not the only issue; other threats to retention were identified, compounding the issue. Six additional executives described a low wage as problematic, but their specific circumstances or concessions made this less threatening to their retention. Nevertheless, they expressed that the wage was not competitive or attractive enough to recruit quality applicants if and when they needed to be replaced. Two longtime executives discussed not asking for a raise in more than a decade of work, while another took a pay cut to keep staff employed. One longtime ED shared a candid conversation surrounding this issue:

> I purposely said [to the board]…you need to be paying me more. If I went to the Lower Mainland, I would be paid practically double what I'm being paid here. And this isn't right... So, be prepared to pay that - to get somebody decent. And I think the penny kind of dropped there.

Another ED who felt their salary was not reflective of the work they perform equated it to a gap in POS; they confided, "I saw another organization's job posting. It was like, 'Whoa, that's what EDs make?'…and it was kind of like eye-opening and…. It's just not on par. I guess in a way it's undervaluing [me]." Multiple interviewees suggested it was better to pay a fair wage and receive fewer hours from executives; one stated, "The board needs to come to terms with like expending this higher wage and having fewer hours, but having higher retention and more educated staff." Some organizations were already implementing fewer hours for better pay strategies. Many board members underlined the importance of a good living wage, sharing their alignment with EDs. One board member shared that the cost to replace a good executive far outweighs paying your current executive more. The "martyr" dynamic was brought up in regard to remuneration as well; an executive shared:

> I come across that quite a bit, that like, 'You should be sacrificing to do this job'. But I… feel like that is wholeheartedly incorrect…People need…compensation to do the work that they do. If you want somebody who has all of these competencies, who can lead teams … You have to pay people accordingly.

The large amount of responsibility and diverse skills required of EDs was misaligned with the compensation rate for many interviewees. One interviewee shared that they were making within $2 an hour of the highest-paid frontline staff person at a well-established multi-million budget nonprofit. Another said, "The wage is not great for the amount of time that you put in and the

amount of stress that you have to carry in this role." Lastly, the dynamic of making less for comparable work to their government ministry counterparts, who also fund the agency's work, was identified as problematic.

4.4 Team Heterogeneity

Table 4.4

Team Heterogeneity & Predicted Executive Director Attrition

	Team Heterogeneity Rating				
Predicted ED Attrition in Next 2 Years	**Unclear**	**At Risk**	**Developing**	**Mixed**	**High**
Yes - potentially preventable	1		2		2
Yes - likely unpreventable*	1				2
No			2		5

In some contexts, team heterogeneity was an expression of POS, as a highly skilled team made executives feel greatly supported, but so could having an extra pair of hands to chip in to lighten the load. The construct showed up in a number of ways, from hiring someone with a skillset the executive felt they or their CSO lacked to reducing their workload. Preventable attrition caused by heavy workloads and job pain point stressors (like HR or finance administration) were mitigated within cultures with high team heterogeneity. The construct was ranked highly in 60% of organizations, and just over 25% were "developing," with two cases being "unclear" (see Table 4.4). This construct had the highest number of developing scores. An example of "developing" rating was a team identifying an existing gap with a strong collective effort to seek out the missing perspective or skillset. A board member brought up the "mixed bag of tricks" executives require from financial, management, and administrative skills – not to mention an understanding of the CSO context and agency programs. These competencies are a heterogeneous list of skills. What follows is an exploration of how team heterogeneity was expressed.

Time in Executive Position and Humility. High team heterogeneity was observed in a majority of teams with longtime executives. Several of these EDs touted the importance of staff they inherited with excellent institutional knowledge. A genuine respect for their experience and diversity was apparent. Associated with team heterogeneity was a leadership mentality of humility. This humble leadership style was detected in most new and longtime executives. The community generally shared the ability to admit they do not have specific experience or a skill set and an interest in embracing their team's strengths. One ED shared, "My decision-making a lot of the time or most of the time is based on input from others." Another ED whose organization ranked highly on team heterogeneity connected it to the services their agency delivers and the importance of differing points of view, "I love diversity of opinion and

thought…I've never been a single mom with three kids. That perspective is valued because that's some of our demographics that we serve. So, no, I encourage that." A longtime ED that experienced considerable growth within their organization advised, "The ED has to be humble enough to know that your employees have skills that you don't have." Long-tenured EDs also referenced longtime trusted staff members who were integral to the organization. That said, longtime employees were also observed in organizations with high turnover. Therefore, long-tenured staff do not guarantee a team's ability to harness team heterogeneity.

Sharing the Load. Regarding this construct, the skills and experience of executives and board members were reflected in an executive feeling "like a pressure and a weight is lifted, because [I] don't have to be the…sole person paying attention to all of this stuff." This demonstrates team heterogeneity in action, translating into perceived organizational support and reduced isolation and workload.

Co-leadership models ranked particularly highly in team heterogeneity, with a natural tendency to select an executive team with complementary styles and skill sets. It also allowed for organizations with diverse programming to have expertise across them; one ED reflected, "All of [our] programs require a different skill set." Formal co-leadership models are not the only way to achieve team heterogeneity. Additionally, an established, close-working managerial and executive team can provide the necessary support and strength. One ED described a manager on their team as the "other half of my brain," highlighting the solidarity and strength a valued colleague can bring. Another shared, "It's about my team because I have this amazing team…I can't imagine some of my colleagues who don't have the support of leadership team like I do…no wonder they crash and burn."

Team Heterogeneity – At Risk. While facing more challenges in this area, smaller organizations demonstrated resourcefulness in activating team heterogeneity. Nevertheless, they have shared creative ways to compensate for the lack of expertise or experience with consultants and engaged board or volunteer members. The pressure for small organizations' EDs to be a "jack of all trades" is a significant risk for burnout and isolation. This underscores the need for support and understanding of their unique challenges. On the other hand, more resources may not automatically translate to activate team heterogeneity. One board member advised how critical it is for EDs of larger organizations to commit to being an administrator rather than getting pulled into the frontline work, where many got their start. It is not a given that a large agency will have high team heterogeneity. As an ED of a bigger agency described still experiencing the "small agency challenge" of missing team bench strength,

> There's stuff I really don't like doing. … I can't trust myself sometimes…We don't have the resources to help support me. So, I'd rather stick to something where it's like, I know I'm good at…And that's what would make me want to not be an ED again… There's just so much to learn, and...you have to make these really big decisions.

This same ED expressed that they likely will move on in a few years. In cases where the executive had the potential for strong managerial input from an experienced team, several indicated they may not realize their team's potential due to their inability to let go.

Team Heterogeneity was strongly linked to POS when agencies could benefit from additional skillsets or manpower, and it was not addressed with support. This was particularly apparent when in the ED's area of weakness or their job's "pain point," leading to a negative impact. These aspects of the job are necessary to the organization's ability to function but can be taxing on leaders; one executive discussed even reducing their paid hours to bring on a staff member to head up a portfolio formerly under their official responsibilities. They believed it would be for the agency's betterment and alleviate the pressure they felt to succeed in an area they do not have interest or experience.

4.5 Other Shared Leadership Constructs & Supplemental Findings

Trust, mission motivation, voice, and vision were all found to have a positive relationship with shared leadership, subsequently predicting executive retention or opposingly potentially preventable ED attrition. While important to enacting shared leadership, these constructs demonstrated less variation than POS or team heterogeneity in the CSOs surveyed and left less room for organizational and individual influence. Further exploration of these constructs can be found in Appendices K through N.

Mission Motivation. As the most uniformly high construct, mission motivation in executives is likely key to activating shared leadership and its other contributing constructs. While it appeared fundamental in executives taking on a role, it was not unshakeable. The EDs who described a fleeting disconnect with their agency's mission indicated this threatened their retention. While overall a strong and positive influence in shared leadership and ED retention, the data indicated that it may be overly relied upon to retain leadership, causing potential neglect in other constructs. A deeper exploration of this construct is available under Appendix K.

Trust. The study's participating CSOs generally ranked highly under the trust construct. Most ED participants were internal candidates and shared how trust was well-established with the CSO board, staff, and stakeholders before stepping into the role. From the ED's perspective, the formal appointment process to executives consistently came up as a pivotal moment in cementing trust with the board. However, in the few cases of trust being currently or previously "at risk," its breakdown caused a domino effect on other shared leadership constructs, often paving a direct path to ED attrition. Additional findings on trust can be found under Appendix L.

Voice. Voice was ranked predominantly "high" across participants, even in cases with newer EDs getting their feet under them. Establishing the link from this construct to preventable ED attrition was more inconclusive as the generally high levels did not provide the opportunity to connect varied outcomes. However, the "change-oriented communication" component of voice (Van Dyne & Lepine, 1998) appeared critical; if voice was enacted but no change resulted after

its expression indicated its need, it damaged shared leadership and the potential for ED attrition. Further findings on voice are located in Appendix M.

Vision. This construct's relevance to shared leadership emerged in the data collection process. While related to mission motivation, similarly inspiring executives with a greater purpose beyond themselves to strive for, it is distinct and not necessarily confined to a shared mission. EDs' vision varied greatly; for example, some wished to be more "caretakers" of an agency, continuing in their predecessor's footsteps, and others were aiming for a complete transformation. In the rare cases where vision was threatened and an executive felt misaligned with the agency, board, or other influential stakeholders' vision, the risk of attrition emerged. A greater overview of the vision findings can be found in Appendix N.

Other Findings. Further relevant themes from the interviews included housing, internal and external executive candidates, and succession planning. All but the latter revealed themselves as prominent themes as the data collection process progressed, leading the researcher to probe areas further in the later scheduled interviews. The housing shortage critically impacted the CSO's ability to recruit external candidates. These communities had a high number of internal hires. Engagement in succession planning varied notably across organizations, despite most of them having currently internally hired executives. Thus, successor mentorship was not well-established. While a fulsome exploration of each topic is outside the scope of this report, the findings are shared in greater detail under Appendix O.

Retention Strategies. Despite participants acknowledging the challenges of ED retention, not one interviewee brought up their agency having a formal executive retention strategy (about half of the interviewees were asked directly). Though several expressed enthusiasm for this idea, one interviewee stated, "I think it's a brilliant idea. And you know it's not rocket science."

4.6 Summary

The findings demonstrate that preventable ED attrition is a risk to Koop members. Burnout, isolation, stress, and low remuneration are common challenges in retaining executives. However, shared leadership cultures appear to have protective effects in retaining leadership. The constructs perceived organizational support, team heterogeneity, mission motivation, trust, vision, and voice contribute to these cultures. The length of time an executive held their leadership position also appeared to impact shared leadership levels. Additionally, these constructs' interconnection and moderating effects on each other were a recurring theme. Successful co-leadership models naturally align with shared leadership and address many preventable causes of attrition. A snapshot outlining ED's predicted attrition, construct rating and leadership structure is provided in Appendix P.

5.0 Co-leadership Findings

Due to the strong relationship between shared leadership and co-leadership models and its relevant findings to the research problem of executive director retention, a secondary findings chapter was dedicated to relaying these results. The study included current and former co-executive directors and one board member from an agency with such a leadership model. Several interviewees had heard of unsuccessful leadership models, but as they were not recent, they could not be meaningfully explored within the scope of the study. The participating agencies with active co-leadership models were some of the highest-ranking shared leadership cultures, especially under the team heterogeneity construct. The predicted retention and tenure rates were also higher than standard solo ED models.

Table 5.1

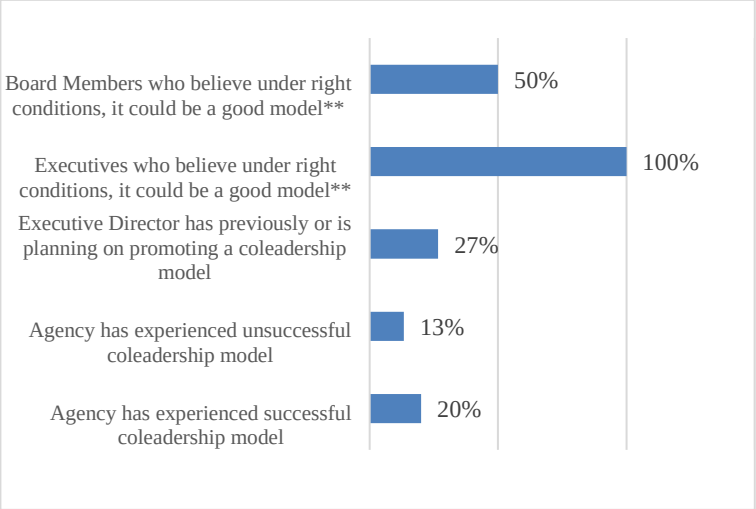
Key Co-leadership Quotes

Theme	**Quote**
Co-leadership	*"The model is the future in the sense that…the roles of nonprofits, especially ones that are so multifaceted… there's a lot of pressure and it feels lonely…So, I just think having an equal to share the weight with is…what's going to make it sustainable and I also…think this new generation coming into the workforce is so much more concerned about a work-life balance."* – Co-ED
	"I think [co-leadership] works very well in organizations where two employees have already worked together, and they know their strengths and weaknesses. And so, you take a job description, and you can clearly identify [responsibilities]...I believe two heads are better than one." – ED
	"I don't think I would be doing the job if I didn't have a counterpart to do it with...certainly at this young age in my career where I don't have a lot of that…experience and I'm still learning so much [from having] somebody to learn it alongside with me and to learn from that person as well." – Co-ED

5.1 Co-leadership Models & Attitudes

Figure 5.1

Co-leadership Models & Attitudes



Many EDs in traditional solo ED models expressed an openness to co-leadership, believing it could be successful under the right conditions. While fewer board member participants were interviewed, they were markedly less convinced (see Figure 5.1). The co-leadership models studied divided executives' responsibilities and salaries through an executive director budget (ED hours were prorated across leaders), with the remaining funds coming from the managerial portfolios they held. This made the model a financially viable option for agencies. Every interviewee from a co-leadership agency stressed the importance of consultants in leading them through the restructuring process, highlighting the need for external support and expertise in implementing this model.

As Figure 5.1 displays, solo EDs also shared attitudes on the perceived benefits of a co-leadership model, all expressing an openness to the model, whereas board members were much more wary. One ED suggested the model to their board and received an "absolutely not" in response. Hesitant board members were concerned with diffused accountability and the concern that if one leader left, the whole structure would unravel. A board member said, "Unless there's some really good reason [for having a co-leadership model] not…to go that direction…it would be a tough goal."

5.2 Co-leadership as a Means to Combatting Preventable Executive Attrition

Advocates for co-leadership shared that the primary reasons for preventable attrition (burnout and isolation) can be protected against when the co-leadership model is done correctly. As one co-leader put it described it as "the future" (see the first quote in Table 5.1). The project client also observed that with this model, EDs are not "working in silos," and they can guard against overworking, stating that when one ED goes away, "nothing skips a beat." Another said that co-leaders protect each other from burnout since, as equals, they can be a "check and balance" flagging when they notice their co-leader needs to take a break. A further co-leader identified that with this model, the reach to funders and partners is much greater and more "manageable." Building on that, an interviewee stated, "That shared responsibility piece right, like, I feel like I'm not the one just holding it all." The feeling that they are not alone was brought up by other co-leaders, with one stating the value of solidarity when addressing "complex staffing challenges." A former co-leader reflected, "If we had the opportunity to do that again here, I probably would jump on [being a co-leader]…it's just cause it's nice to be able

to not have that full stress just on you." Additional quotes on co-leadership can be found in Table 5.1.

Architecture for the Landscape. The co-led agencies within this study had hired internal candidates whose personalities and strengths were well-known to the organization. This leader complementarity reflected Alvarez et al.'s (2021) guidelines on successful co-leadership. The restructuring was described as "like architecture for the landscape kind of thing" by one participant. Interviewees advised that personality fit is essential to making it work, a former co-leader cautioned, "Make sure that you get along with the person you're doing it with." They warned that it gets complicated when one ED leaves and the agency may seek an outside candidate to be the missing piece of the puzzle – not an impossible task, but tricky. A referenced past failed co-leadership model in the community was attributed to interpersonal conflict and disparate leadership styles as its downfall. However, this issue was not observed in current participating agencies with co-leadership models as a risk to stability. A co-leader described, "[Our] interpersonal dynamics are really good. We're able to be honest and upfront with each other. We're able to voice… constructive criticisms…there isn't…like a toxic side to it." Another ED saw conflict or disagreement as potentially generative, saying that a "power struggle is where the magic is," forcing leaders to reflect on their egos and outlooks and find a better plan together. A further interviewee shared how they thrive from the "collaborative decision-making process…inherently [valuing] other people's opinions," another called it "more dynamic," even when they didn't necessarily agree with the outcome.

A solo ED interviewee was preparing to pitch the co-leadership model themselves, "The organization would be better served that way. Having…someone doing [this programming] …and then somebody doing [that programming]...I just know how much needs to be done." They went on to address the interviewer's question about the advantage of this model over a standard executive with a senior management team, answering co-leadership eliminates bottlenecked approvals. Communication amongst co-leaders was stressed, shared goals and value system. One described, "Our philosophy really is [that] shared leadership is shared power, and that sharing of power is where that accountability and…really ethical decision-making comes in."

Developing Leaders. As the team heterogeneity section outlined, the strength arising from the diverse skillsets available with multiple EDs was repeatedly highlighted. Each leader had a specialty and interviewees shared that it was unlikely an agency could achieve this diversity of knowledge from one leader. Developing confidence was a noted benefit of the model; a co-ED described, "My hard skills have improved as well as my confidence. And what skills I already have. But I still don't feel confident to be a sole ED. Maybe in 2 years' time."

Perceived Organizational Support & Co-leadership. All interviewees named co-leaders as their greatest supporters and a valued source of mentorship. One of the identified pain points in the executive role was dealing with challenging personnel issues; a co-leader addressed the support

they received from their fellow co-leaders, “I could not imagine having to go down that pathway as a solo ED… Honestly…I don’t know if I could have done it...It would have been on my mind to resign because it was so difficult.”

Shared Leadership Constructs at Risk. While the data primarily provided examples of successful co-leadership models, one area where a potential threat to ED retention was identified was a misalignment between co-leaders voices. One co-leader reflected on a challenging chapter where they felt they were not being heard by their colleague, leading them to consider leaving. This interviewee shared that they had moved past this and repaired the fracture, but it did impact them intensely at the time. Power dynamics amongst co-leaders was explored by Gibeau et al. (2020) who found that “assimilating…rather than balanced integration of competing demands” (p. 464) is a risk. This played out in an example from the past shared in which a co-leadership team was appointed, and within one week, one of the EDs went on to convince the organization that they should be the sole ED, consolidating power. Ultimately, this executive was terminated due to another issue related to a breach of trust. Several respondents with firsthand experience in co-leadership models discussed the potential for slower decision-making, time spent communicating, and a lack of innovation since more decision-makers need to be aligned.

5.3 Summary

Co-leadership surfaced in this study as a unique expression of shared leadership. The findings demonstrate its high ranking in shared leadership constructs, and participants tied a direct connection between a successful model and the natural ability to address the common threats to preventable executive attrition, creating a potentially more sustainable option for certain CSOs. However, there is still a divide between board and executive attitudes in the feasibility of these models.

6.0 Discussion and Analysis

The purpose of this discussion is to spotlight and analyze key findings collected from the study. The leading research question was, "*Does shared leadership provide a protective effect in CSO executive director retention?"* The findings revealed that shared leadership was associated with CSO ED retention via high existing or predicted tenures. The inverse was also true, supporting the hypothesis: that fractures or threats to shared leadership constructs were associated with predicted and actual preventable ED attrition.

Addressing the secondary research question, which asked, "*What influence do the various shared leadership constructs have?"* the findings demonstrated all constructs of shared leadership examined to have a relationship to it, with the data pointing to varying levels of importance and influence. The ones with the greatest promise for attending to the research problem of preventable ED attrition were perceived organizational support (POS) and team heterogeneity. These constructs were found to have the highest variability across organizations, with the most weaknesses observed. As a result, they are potentially where the most impact is possible. However, it is critical not to omit the importance of the other constructs, especially if they are at risk, as this can also easily threaten retention. Additionally, the co-leadership model appeared to foster a shared leadership culture by ranking the highest in its constructs. It is also discussed at length, as it appears to be a promising and under-considered model. This study is the first known to explore if shared leadership has a role in community service organizations' executive director retention and, therefore, invites further scholarship on the subject matter.

6.1 Executive Director Tenure & Preventable Attrition

Just over half of the participating agencies indicated they thought their ED would leave in the next two years; one-third of all agencies surveyed predicted their ED would go for a preventable reason. While the research found executives leave for several unpreventable reasons (e.g., family circumstances, health, retirement), the most prevalent cause of preventable executive attrition arose from two main themes – burnout and isolation. While burnout has been a longstanding, well-documented threat in the sector (Hunter & Decker-Pierce, 2020, p. 33; Tierney, 2006, p. 16; Vantage Point, 2024, p. 19; Wanza, 2024, p. 136), it has grown recently, and the topics of leader loneliness and isolation are less prevalent in the literature (Stewart, 2016, p. 54). This preventable ED attrition is cause for concern. The fact that participants were generally from small to mid-sized nonprofits does predict a greater turnover risk (Wanza, 2024, p. 136). That, coupled with the reluctance shared by so many ED interviewees to take on the role initially and the scarcity of detected mentees, forecasts that this leadership deficit will only grow. All this points to the need to invest more in the current staff.

A phenomenon emerged, coined by the researcher as the "reluctant leader," it is categorized by an executive whom board members or peers have convinced to apply for the role or out of the ED's concern for the organization's well-being, not primarily out of an innate desire

to advance in their career or hold the position. A full exploration of this topic is outside of the scope of this study. While Carmen et al.'s (2010) study looked into the hesitancy of younger professionals to take on the executive role (p. 102), further analysis of the trajectory of those who actually do accept the role is a gap in current scholarship. As this study suggests, context likely plays a role in the retention of said leaders, though more rigorous exploration is needed to understand the extent of this effect better.

While the predicted mean tenure of EDs in this study was similar to the literature, 6.3 to 5.59 years, respectively (Santoro & Sarros, 2001, p 56.), length in role differs by shared leadership levels. Those with "mixed" shared leadership scores were within this time range. However, those with high shared leadership ratings demonstrated tenures well beyond six years, and those with predicted low tenures were the opposite. This study's results aligned with Wolfred's (1999) findings that leaders generally wanted to fill the executive role only once. The mode of one year suggests a recent wider sector turnover – likely due to COVID-19 and baby boomer retirement. Not one respondent felt that less than seven years was ideal for a competent leader, and the fact that one-third of interviewed executives planned to leave after three years or less is alarming. This mismatch between retention ideals and reality implies future instability to CSOs, their services, and the sector.

A pattern of thinking that newer EDs will not stay for extremely long tenures was expressed, but this was in opposition to what a good portion of this group reported; a number stated they would like to serve in the role for 10 years or more, so long as it remained feasible for them and their agency. Their shared leadership score predicted their desired tenure rather than actual ED time in the role. This potentially challenges the "younger generation" itchy feet reputation. However, the interviewee's age was not gathered from the study, and 10 years in the role may still seem short to executives who served 25 years or more. More reassuringly, the agreement that tenure should be longer than it is currently for many organizations may indicate a willingness to make changes to improve retention.

6.2 Shared Leadership

The pattern of shared leadership being "disappeared" or perceived as "mundane" was not observed in interviews, as Pearce & Conger posited (2003, p. 7). While study participants were not asked outright, "Do you have a shared leadership culture?" they freely recalled examples of its constructs in critical incident question format, implying the concepts' salience. Interviewees readily expressed the meaning of these constructs being enacted or quashed. Several interviewees were so moved by the topics that they began to cry. This suggested, along with its connection to ED career trajectory, that the elements of shared leadership are woven into everyday working life and color the experience for leaders. This challenges the description of shared leadership's "mundaneness."

There was no apparent pattern between shared leadership cultures and organization size, organization age, or budget except with remuneration and team heterogeneity. This is intriguing,

and while more research is needed, it is helpful to frame conversations with this knowledge, squaring narratives organizations may have about fostering shared leadership cultures.

Perceived organizational support and team heterogeneity had the greatest variability and number of low-ranking scores across agencies. These constructs also appeared to be the most accessible, as they less taboo topics, like trust, to discuss in an attempt to improve culture. They are also more concrete objective constructs. Constructs like vision, trust, and mission motivation are likely not easily built up but rather require the raw material (e.g. leader predisposition, interpersonal rapport, and skillset) and an openness to engage in complex personal and interpersonal work. Research should be conducted to assess the ability to change various constructs. For example, is increasing an ED's professional development budget (an expression of POS) more likely to boost a shared leadership culture than encouraging a leader to do trust-building activities with their staff?

Time and Activating Shared Leadership. Organizations scoring higher in shared leadership were associated with longer-standing EDs. Does shared leadership promote long tenures, or does a long tenure enable the establishment of a shared leadership culture? Or is this bidirectional and concurrently happening? These questions cannot be answered within the scope of this study and are premises for future research. However, the implication is that the leader is essential in activating shared leadership. It also supports Freund's (2017) and Klasmeier and Rowold's (2020) work which posited that leaders influence the activation of shared leadership (p. 923). This is evidence of constructs' fluidity over time and is encouraging for organizations currently facing such a challenge. "Insanity is doing the same thing over and over again and expecting different results," Einstein said (Wilczek, 2015). To break out of the pattern of high preventable ED attrition, executives and board members need to re-assess the job as it stands. Did those long-tenured EDs from high-ranking shared leadership cultures have similar rates of predicted attrition risk at that same point in their career (a few years into their executive role)? It is unknown but worth further inquiry in future studies. Regardless, it is fair to say that the first few years are critical in establishing a retention strategy that works. Shared leadership is a promising means to that end.

6.3 Perceived Organizational Support (POS)

POS was the most expansive construct - interviewees shared a plethora of ways it showed up or was missing. POS had the most "mixed" and "at risk" ratings of all the shared leadership constructs, indicating its breadth and that there is more room for variation in how it is "perceived" by leaders, which its name indicates. As such, this suggests the area where the most creativity can emerge. It is also an area of potential pitfalls for that very same reason. Interviewees firmly stated the importance of intervention in these circumstances. Where a gap in POS meets under-resourcing and burnout, the data suggest a considerable risk of attrition emerges. This is where team heterogeneity activation can be utilized; the fact that POS can come

from a variety of organizational stakeholders (board, volunteers, staff, co-leaders) is positive – it makes the enactment and enforcement of POS more achievable.

This collective responsibility of creating POS is critical. At the same time, leaders were asked how they received support; one interviewee shared their reluctance to do so, and others described only asking for help when they were breaking down. Consequently, if an organization's leadership (board and/or senior leadership) does not take an ED's request for support seriously, they may be headed for executive dissatisfaction and potential attrition. The takeaway is that if the ED asks for help or intimates that they are struggling, a swift display of support can go a long way. Co-leaders mentioned that their counterparts supported them by being on the watch for their potential burnout, alleviating pressure and responsibilities on the board and staff to do so.

Additional hurdles – Challenging Leadership Contexts and POS. The workload stress executives experience was compounded by the fact that many also had insufficient onboarding and a lack of mentorship. There were a substantial number of reports of stepping into the role without the resources needed or even access to critical documents like the CSO budget or contracts. Unsurprisingly, these circumstances were potential precursors to overwhelm and burnout. A surprise was that internal candidates also reported this issue. POS starts on a rocky footing for those with poor onboarding, laying the groundwork for an isolated experience. This implies that the earliest interactions can build the foundation of the shared leadership culture. Perhaps because they were not the heir apparent in most cases but reluctant leaders, time was lost in the succession process. Nevertheless, in other cases, the low resources and competing demands the predecessor ED faced likely explain this phenomenon. Roughly half of the interviewed leaders entered their role in a challenged leadership context – it is likely a huge part of why this role is so challenging in the first few years and impacts the predicted tenure in this critical period. To what extent can an ED turn this around and implement a shared leadership culture when stepping into a formerly dysfunctional culture? This question is for further research to determine. Nonetheless, the interviewees' commitment to bettering their organization was reassuring and a testament to their mission motivation.

Leaders: Support and Boundaries. Flexibility when leaders face tough times is important. For some interviewees, these were defining moments between the leader and their agency. When a family or medical emergency occurs, the level of support with time off (paid and unpaid) and emotional support leaves a deep impression on how they felt valued – for better or worse. Understanding and support go a long way here. Pre-established strength in team heterogeneity helps an organization to navigate the leader's absence successfully and prioritize their well-being. Developing robust processes and benefits for these instances can support individual and organizational retention.

The data supported the workaholic ED trope (Linscott, 2011, p. 43), though it also detected self-awareness and intentional boundary setting in executives. A conscious commitment

to what leaders were and were not willing to sacrifice came up. While not explicitly asked about, examples of EDs who modelled a work-life balance were few and far between. This must have implications for the current and next generation of leaders on the desirability of the role. They learn the job responsibilities and obligations by example. Reassuringly, organizations are exploring a new path forward, like reduced hours for better pay, formal co-leadership models, and drawing on longtime supports like peer networks.

Remuneration. Remuneration was unsurprisingly a significant theme under perceived organizational support. The topic came up in roughly three-quarters of interviews without direct prompting. The subject could warrant a study of its own. Those who identified a low ED wage as problematic also tended to report under-resourcing at their organization and lacking support from their agency in general. This suggests that low wages are a symptom of the problem, not a standalone issue. Furthermore, it impacts the candidacy pool, though to what extent, invites further study.

The dynamic of EDs overlooking wages they deem problematic for a potential successor is very interesting. Various EDs provided a throughline explaining the dynamic of accepting low wages, to their mission motivation. They shared that they had made a conscious decision because of their commitment to their agency's work. The newer generation of leaders verbalized more frequently that they do not buy into the martyr complex; compensation for work done should be fair. This "problematic for their replacements wage" likely partially explains the challenge of finding applicants in the first place, the hesitancy to take the role, and the lack of external candidates in ED roles. The trend of agencies not re-evaluating ED wages until a new one is being recruited is also concerning. Some CSOs reported increasing wages only after longtime EDs stepped down and they were forced to in order to be competitive. Firstly, this indicates that a reactive rather than proactive organization (assuming the former ED is competent) will adjust remuneration only when the agency feels it has to. Further research on the trickle-down impacts on staff and their retention, specifically in non-union positions, is warranted as it likely sets the table for how EDs approach their team's remuneration strategy and implementation. This paints a bleak picture. However, the consistent attitude across both EDs and board members was that executives should be paid well for their work. This challenges older research on succession planning, where organizations have been shown to discuss replacing their leader as cheaply as possible (Allison, 2002). More current studies do show an effort to pay higher (Vantage Point, 2024, p. 39); nevertheless, these efforts need to be amplified.

Peer Networks & Professional Development. Interviewees shared the importance of peer networks as a form of POS. These networks were described as a source of connection, team heterogeneity, resources, and mentorship. Often affordable, like the project client, the Koop, and sometimes even free, the biggest hurdle was prioritizing participation within their limited time. Both board and executive interviewees expressed the importance of professional development. Making leaders feel supported with growth opportunities and time away from the daily grind of running a CSO were reported as critical. Professional development can spur connection, growth,

and inspiration. It also can be a form of team heterogeneity, as the executive can tap knowledge from outside their organization. Professional development and peer networks alike encourage the potential for mentorship outside of the organization's sphere. They also combat isolation coming with the ED role. One interviewee shared that there are probably more than enough networks and resources for leaders to access if they knew where to go and had the time to engage with them. Therefore, the work is for organizations to enable the leader's engagement with these resources, knowing that the benefits are worth it in the long term.

Coaching & Mentoring. Geib and Boenigk (2022) assert that the nonprofit sector is particularly weak in developing employees into leaders (p. 7). With almost all interviewed leaders being first-time executives, the need for coaching is high. Very few reported having a formal or informal coach, currently or prior to stepping into the executive role. This trend coupled with the confidence new leaders state they are building up, implies that the sector has a gap in supporting new leaders. Wanza's (2024) study also builds on this theory, finding an association between retention and professional development (p. 133). This study concurred with those researchers' findings, showing room for improvement. The troubling cycle appeared to continue despite the current leaders' reflection that they could have been onboarded and supported more successfully. The gap presented as those same executives who experienced poor training wished to do better for their team. They reported investing some time in succession planning and coaching, but most ED interviewees felt they should be doing more.

The findings that roughly half of EDs entered a "challenged leadership context," along with the reported shortfall in onboarding and expressed a desire for more coaching and mentorship, is worrying. EDs in this scenario will likely find themselves with low POS, which leads to isolation. Indeed, organizations are not setting up EDs for success. An expert trusted confidant, whether hired or on the CSO's board, can build confidence and reduce the ED's isolation. It likely speeds up the challenging transitionary time new leaders face as they get comfortable in their role. Further study should explore this.

A Unified Front. A surprising result was the level of public scrutiny some leaders experienced as a stressor. While the literature notes the central role in the community CSOs play (SSLMRFP, 2020, p. 53), the pressures that come to EDs from addressing complex social issues with limited means in often controversial contexts is underexplored. A risk of isolation here stems from this aspect of the role. The data provided an example of how this can escalate in nonprofits, where staff and the ED have experienced micro-aggressions regularly at work. Another board member described their role in diffusing community controversy by taking some of that pressure of the ED as part of their role. When board members' skills and experience were leveraged to support an ED, they reported feeling "like a pressure and a weight is lifted, because [they] don't have to be the…sole person paying attention to all of this stuff." This demonstrates team heterogeneity in action, translating into perceived organizational support. Co-leadership models naturally excelled in team heterogeneity with expanded bench strength in leadership and a collective voice in the

community. This potentially can alleviate the pressures and isolation that come with advocacy EDs are often called upon to do.

6.4 Team Heterogeneity

Team heterogeneity was also identified as a key construct to invest in when building up a shared leadership culture. Interviewees shared a number of ways team heterogeneity was fostered - whether via a paid employee, contractor, peer advisor, professional coach, or volunteer expert. While analysis was covered under POS, peer networks can also provide expertise and professional development as a way for CSOs to access and incorporate diverse knowledge and expertise. A more diverse team alleviated the weight of responsibility on the leader and backfilled for competency gaps they may have.

60% of CSOs ranked highly, about a quarter as "developing" in this construct. Team heterogeneity is not only something to be fostered; it also requires intentional action. Examples of board members and executives embracing the expertise of others demonstrated this. The newer executives' intentions to build a more diversely skilled team were associated with developing scores. The higher scores in team heterogeneity in long-tenured EDs suggest that time is integral to enacting this construct. The study's high number of developing scores points to the sector's under-resourced nature and the cohort's newness. Assessing and building out one's team takes time. Because of the constant resource constraints nonprofits face, it was also the most challenging construct to gauge. Sometimes, it was unclear whether the organization was lacking diverse skills because of low resources (time and, or funds) or other reasons, like a reluctance to change the status quo, a leader's preference to maintain control over an area, or the martyr complex that was referenced in interviewees. Because developing scores were primarily associated with new EDs, how this construct gets established will likely become an important factor in their retention. If these EDs repeatedly do not receive support in challenging areas or have expertise available to them, they will get worn down.

Team Heterogeneity and Trust. Team heterogeneity was moderated by trust; some EDs expressed their desire to take things off their own plate but shared examples of how things were not done correctly when attempting this or required them to intervene. The researcher was not able to evaluate how much of this was the ED's preference versus a clear-cut performance or purview issue that demanded their attention. In cases where the executive had the potential for strong managerial input from an experienced team, several indicated they might not be fully realizing their team's potential due to their inability to let go, thus leaning more towards "heroic" leadership. Also referenced by a board member who outlined the common challenge of becoming an administrator as a CSO ED rather than getting hands-on themselves and demonstrating how leaders themselves activate shared leadership once more. This implies an area of growth for EDs may be in delegation.

How trust between EDs working alongside longtime agency staff to harness team heterogeneity gets established requires further exploration. These long-time staff members can

become valued advisors and coaches to EDs, with incredible trust and respect given to them, which was the case in several high team heterogeneity cultures. Routhieaux (2015) cautioned that trust is essential for implementing team heterogeneity (p. 147) and Wu et al. discussed "mutual influence" within diversity to provide the fertile ground needed for shared leadership to flourish (p. 915).

A "humble leadership" style was detected in many new and longtime executives. This was characterized by an ability to admit they do not yet have specific experience or skillset and an interest in embracing their teams' strengths. Associated with team heterogeneity, this was almost like a philosophy many of these leaders shared. This finding was informed by repeated comments of respect for others' strengths, acknowledging personal areas of growth, an eagerness to be mentored and for many, an initial reluctance to take on the role. This complements the literature that nonprofits are more amenable to shared leadership cultures (Allison, 2002, p. 347; Freund, 2017, p. 14) as the sector tends to downplay the executive's influence and emphasize the collective's importance.

6.5 Other Shared Leadership Constructs & Supplemental Findings

The remaining shared leadership constructs were all found to be relevant to its enactment and could be traced to threats to executive attrition, or alternatively support their retention. Within this study's CSOs, mission motivation, trust, voice, and vision were less variable, though, and consequently presented less opportunity for differentiation in outcomes and learnings. Hence, the analysis focuses on POS and team heterogeneity. Furthermore, with mission motivation, trust, vision, and voice ranking highly overall, they present less potential for improvement in efforts to strengthen an agency's shared leadership culture. Additionally, activating POS and team heterogeneity appeared less complex as an internal (individual) and organization-wide construct. Further analyses of these constructs can be found under Appendices K-N.

Mission Motivation. As the highest-ranking construct, mission motivation surfaced as critical in an executive accepting the role but also staying in it. It likely moderates all other constructs and creates a common ground that unites an agency's stakeholders in building a shared leadership culture. While a considerable asset in nonprofit executive retention (and recruitment), mission motivation may also have some potential downsides, as it can overshadow the need to invest in other shared leadership constructs like perceived organization support (for example, low remuneration) or prioritize those closest to a mission rather than a vaster candidacy pool when undergoing a leadership transition. More analysis is covered under Appendix K.

Trust. Trust, too, is an integral component of shared leadership - it is foundational in its composition but also acts as a moderator, supporting the enactment of all other constructs, except vision, directly (within this study's data). The influence of internal candidates seemed to play a significant part. The recovery of trust that occurred after a preceding executive had left for this reason demonstrated a surprising dynamic – that the current executive wished for greater board

involvement. However, this is in contrast, the literature describes micromanagement as common in this scenario (Stewart, 2016, p. 52). This is perhaps due to the board's significant investment of time and energy during the interim period and the fact that most EDs were already known to the board. A leadership breach of trust reverberates through an organization, impacting its ability to build up a shared leadership culture.

An area of contradiction lay in an ED's self-reported trust in their team, and several of them reported finding it difficult to take time away. The reasons varied between guilt and cited examples of past crises, but this, coupled with the fact that most had not begun formally mentoring a successor, invites further inquiry. Additional analysis is in Appendix L.

Voice. Voice was found to be generally high in surveyed CSO cultures. An unanticipated result was the high voice level in new EDs, even those who described their confidence as "developing." This may be impacted by the percentage of internal candidates who developed a rapport with stakeholders before adopting the role. And yet again, mission motivation could moderate the construct, meaning that the dedication to serving clients overrides any potential personal impediments to using one's voice. Considering these results and the high ratings in ED trust, it may be that EDs have a predisposition to engage in hard conversations. The relationship of voice to listening or "being heard" was an important distinction. What followed after an executive's disclosure surrounding an issue that prompted action in their eyes, created a pivotal moment for shared leadership – an opportunity to demonstrate POS or ignore it. Further discussion is under Appendix M.

Vision. While present in the shared leadership literature (Klasmeier & Rowold, 2020; Santora & Sarros, 2001; Wanza, 2024) the relevance to executive retention and attrition was not initially included in the framework. Its incentivizing power is a topic for deeper study. Unique from mission motivation, though fuelled by it, vision is an executive's ability to put their own mark on their agency, reflecting their interpretation of mission fulfillment. A CSO's mission is a shared cause, and an executive's vision is their personal take on realizing it. In the longtime executives surveyed, their vision evolved over time, suggesting its changeability is key to keeping the work relevant. Fostering executive vision may prove critical in CSO board retention strategies. Appendix N covers this construct's analysis in greater depth.

Construct Interconnection and Fluidity. The interconnection of these constructs can potentially create a domino effect on the others. Therefore, it is important to be aware of them all to mitigate shared leadership breaches promptly. This interconnectedness also suggests that strength in one construct has the potential to build or stabilize a weaker construct. For instance, low POS could be adjusted by strong voice and trust, enabling EDs and boards to address a sensed support deficit, remedying the executive's concern. The fluidity of the constructs was demonstrated through interviewees recalling various times constructs were at risk, that had them considering leaving but then explaining they had moved past this issue since with proper repair. Across the interviews indicating that ongoing investment and commitment to these values matter. It is also

reassuring that missteps can be corrected. Therefore, it goes to reason that cultivating a shared leadership culture is ongoing work that executives, their teams, and the board must be committed to. Consistently assessing and investing in the various constructs provided a protective effect against breaches and potential attrition threats elsewhere.

Leadership Beliefs. Certain areas of inquiry inspired intense, decisive responses. One topic where firm opinions surfaced was co-leadership. It evoked strong value judgments on leadership and sensed commitment to the role from many interviewees without much personal experience. This indicates that shifting this thinking may be particularly difficult for those wishing to change the leadership status quo at their organization. Another area where this arose was expected tenures and loyalty to the organization. Despite the unanimously reported perceived dedication to the organization and its mission, interviewees were split on their outlooks of commitment and work ethic required from a leader. There was simply a lot of variation in how individuals conceived an executive role "should be done." Examples of the martyr ED, working for low wages or advocating for co-leadership (to some, interpreted as vying for a lightened workload), implied a lower level of dedication. Another example shared was the willingness of this younger generation of leaders and employees across sectors to move employers. If there is to be an adjustment to the role towards sustainability, it must be in earnest. To have productive conversations about ED role sustainability, these beliefs must be verbalized, questioned and addressed with open minds from both EDs and board members.

Succession Planning, Recruitment, and the Labour Pool. While not the primary focus of this research, succession planning activities and attitudes were discussed, with data revealing a preparedness gap for CSOs. This is a red flag, especially considering the potential challenges agencies may face with the study's predicted ED attrition rates. This study looked at the current and past leaders of nonprofits in small communities (village to small city size) and found that most current executives were local, first-time EDs promoted from within, just as the literature predicted. There were examples of successful executives moving to the community, but more examples of EDs struggling to integrate locally.

The literature warns that smaller communities have limited labour pools, and nonprofits must search outside for executives (SSLMRFP, 2020, p.59). Reluctancy to take on executive roles is a significant factor for various reasons (workload, prospective ED confidence, and experience/qualifications), but co-leadership offered them a safer and more appealing way to approach it. Preference for an internal candidate is observed in the literature (McKee & Froelich, 2016, p. 593), and the rates of internal ED hires in this study mirror the preference. Candidate type has been related to the mission connection as boards aim to "[protect] organizational values" on top of a wariness of the transferability of candidates from other sectors (p. 7).

Housing. Housing came up repeatedly as a concern for recruitment of EDs and how it is a massive barrier to attracting external candidates. This challenge creates an additional barrier to recruiting candidates not already living in the agency's community. If an agency can provide

support sourcing housing and rentals, it may dramatically improve its ability to secure an external executive.

6.6 Co-leadership

Co-leadership models received some of the highest rates in shared leadership, especially in POS and team heterogeneity constructs. The data suggest that shared leadership may lay the foundation for successful co-leadership models, or co-leadership inherently invites a shared leadership culture. Commonalities in the observed leadership agencies may also play a prominent role in their viability, including the following shared characteristics observed: being located in rural and remote communities, mid-sized organizations with diverse programming, employing local, internally hired co-leaders, and using consultant(s) to guide them through change management. All these variables should be studied further to see their individual and collective impact on shared leadership and executive retention. The directionality and strength of these variables are a point of future inquiry. In a sector plagued with staff burnout and isolation for those at the top, the study's findings that co-leadership lessens these risks is a novel area of scholarship for nonprofits. While these findings are promising, more research is required to better understand the data's generalizability.

Co-leadership Attitudes versus Findings. The attitudes towards leadership varied considerably across the interviewee group, with board members being more reluctant overall to see it as an appropriate leadership model. The board rates were not a surprise, but executives' extremely high levels of openness were. This may be due to the interview subjects being Koop network members and having observed successful co-leadership models from their peer organizations. Additionally, multiple solo EDs mentioned a desire to explore this model for the betterment of the organization and for their own benefit and sustainability within the role to guard against burnout. Common concerns expressed in the model included instability (if one ED leaves, then the other will have to, or it will be impossible to find a co-ED replacement); however, co-leader participants predicted longer average tenures than solo EDs. This is likely because of the benefits the leadership model offers and the safeguards against attrition risks like isolation and burnout in co-leadership and shared leadership cultures. A potential confound is the size of these communities where comparable roles do not really exist. However, the co-leadership cultures participating in the study had histories of long tenures and, more recently, continuous fast turnover of leaders, implying it goes beyond the geographical context they are in and that the structure plays a role in retention.

Some interviewees flagged slower decision-making as a potential downside with co-leadership, conflicting with Klinga et al.'s (2016) study, which reported efficiencies in delivering integrated services in Sweden (p. 5). It may be more nuanced; while this may be true on the administrative side of running an organization where integrated services or programs are concerned there could be substantial benefits and improved seamlessness. Additionally, both interviewees expressed concerns over an inevitable power struggle among leaders. However, the

co-leader relationships studied were described overall as quite stable, and the conflicts that had arisen were seen as fruitful. A possible explanation is that those interested in this model have self-selected, and all appeared willing to cooperate in the manner required for this leadership dynamic to work.

Several interviewees brought up concerns over duplicating executive pay at a non-profit. Certainly, in other sectors, having multiple CEOs may be exorbitant, but the pay differential between roles is less in social services agencies; the surveyed models split the ED wage and then supplemented the salaries with the senior manager portfolio the co-leader oversaw, making it more feasible. Some board interviewees expressed that a sole point of accountability was necessary for an agency, which shows a hurdle in potentially considering this model. Possible reasons for this are the assumption that it will be more work, managing two or three EDs versus just one, the sense that accountability is diffused across leaders, and the ambiguity of the role. A further value judgment that co-leaders do not want to work as hard as their solo counterparts arose – the questions this researcher has is, "Do others share this opinion?" and "So what if this assumption is true?" meaning, the workload and overwhelm of the role are so commonly reported that this may be a natural and strategic response towards making this role sustainable. These conflicting views could be an opportunity to explore hierarchical beliefs held by boards, despite Allison's (2002) article noting nonprofits generally view themselves as being "flatter," it is still a belief that could impede adaptive transformations. Thus, this study's participants' negative assumptions about co-leadership suggest this could be a significant hurdle to clear. Notably, most hesitant views came from individuals without firsthand experience with co-led nonprofits. A critical point is that many of the interviewees' concerns were initially similarly held by the boards and incoming co-leaders. However, those who adopted these models appeared to proactively address and mitigate predicted threats in the change management process.

While one agency did discuss their long exploration into co-leadership that was prompted by the circumstances of repeated turnover, a future area of inquiry could be how these attitudes evolved, especially in board members, given the reluctance half of the board interviewees in this study showed here. The difference in ED and board attitudes is worth studying further. Perhaps the ambiguity sensed in this model is different across these groups or more palatable to EDs. Clearly, the potential upsides are enticing for a group so at risk for burnout.

Co-leadership: A New Way Forward. This study outlines the many reasons to consider co-leadership models - the aforementioned concession that the status quo of the executive role might not be working well for certain CSOs and that there is room for improvement. With the small pool of interested successors and the risk of ED attrition, increasing the desirability of the role should be a priority across the sector. With 100% of ED interviewees stating co-leadership could potentially be a good solution for CSOs, it is important to acknowledge what leadership candidates want; these results imply the model could be enticing for new leaders and experienced ones alike. The approachability of stepping into a co-leader versus solo ED role is worth incorporating into agencies' recruitment and retention plans as a potential avenue of exploration.

Co-leadership is a confidence builder for new EDs and connects the younger generation to the all too often elusive notion of work-life balance.

6.7 Conclusion

These findings begin to lay a track down for community services organizations wishing to retain leadership proactively. What follows in the recommendations section is an outline of actionable steps to be taken from this research. The study establishes a link between shared leadership constructs and whether an executive chooses to stay or go prematurely. As many researchers have previously found, shared leadership's benefits extend far and wide within an organization. Even for organizations with ED retirement on the horizon, the findings may prove valuable in setting the next ED up for a successful tenure, as shared leadership begins with the recruitment phase. For many organizations, it happens well before that, as internal candidates have been immersed in the agency's culture long before adopting the ED role. Necessity is the mother of invention, and when organizations feel they must, they may start assessing and being proactive in their leadership structure, fostering a shared leadership culture, and investing in leaders.

7.0 Recommendations

To break out of the pattern of executive burnout and isolation leading to preventable attrition, CSOs' leadership needs to re-assess the job as it stands. The recommendations that follow are attempts to disrupt current preventable ED attrition trends. This chapter outlines the top options for the project client, the Koop, to consider, which surfaced from the research findings and literature review.

7.1 Recommendations

Create Opportunities for Koop Member Agency Boards and Executives to Explore Shared Leadership Models.

> *"I think having an equal to share the weight [of leadership] with is…what's going to make it sustainable."* – Co-leader

- Present research findings on shared leadership (co and solo-ED models) and its benefits to member agencies' boards and executives. Create ongoing dialogue on the benefits of shared leadership cultures.
- Host an information session with change management consultants, executives, and board members to dispel myths surrounding co-leadership models.
    - In consultation with Koop members, create a short resource outlining what successful models share and best practices for getting started with a co-leadership model.
- Revisit member interest in the Koop coordinating shared administration models to access diverse skillsets efficiently at the next strategic planning session.
- Provide training to boost team heterogeneity, including leadership development, staff training resources, and cross-training guidance.

Investment and Expansion of Resources to Address ED Isolation and Burnout.

> *"The thing with the nonprofit [ED is], you are the top. So, it's a very lonely place."* – Longtime executive

- Host a more formalized peer and/or traditional mentorship network for executives.
- Invest in creating leadership training resources for possible ED successors, as the research shows a high likelihood that local CSOs' subsequent ED will be an internal hire.
- Prioritize ED networking and professional development opportunities for members, for example:
    - Continue member sharing at Koop council meetings and monthly ED Network meetings;
    - Find opportunities for in-person events several times annually to facilitate relationship building.

- Advocate to CSO boards, advocacy and umbrella networks, and roundtables on the challenges of the ED role and difficulties passed down from funder to agencies.
- Prioritize ED board member engagement as member representatives to encourage the proliferation of Koop messages and offerings.

Create an Executive Director Retention Strategy Framework.

"I think [an executive retention framework] a brilliant idea. And you know it's not rocket science." – Longtime executive

- Pilot and develop a framework with several interested Koop member agencies' leadership teams.
    - Initial ideas for framework:
        - Make use of the academic literature on succession planning frameworks and developing and retaining human service nonprofit leaders, updating them for the regional context (Geib & Boenigk, 2022; Gothard & Austin, 2013, pp. 277-279).
        - Build the shared leadership constructs into the retention framework.
        - Include an assessment of current employees when conducting succession planning. The findings suggest they are the most likely successors even if employees do not express interest in the career path.
        - If the agency plans to hire an outside executive, the board and organization should create a comprehensive plan for their community integration (e.g., housing, social connections).
        - Identify potential successors and create a plan for training opportunities and mentorship.
        - Implement retention framework in concert with other critical, established strategy activities like succession planning, annual review, and/or strategic planning.
        - When onboarding, provide ED with a coach or "go-to" for guidance. Ensure that the coach is supportive, knowledgeable, and highly accessible.
        - Ensure ED remuneration is fair and ideally competitive.
            - Assess ED's current wage and develop a long-term sustainability strategy (i.e., raises commensurate with inflation, increased education, experience, etc.).
            - Conduct regular market comparisons.
            - Examine the budget and find money to match recommendations. If not presently possible, consider reducing hours. If salary or budget is insufficient and immovable, consider this and re-assess expectations for the leader and agency. Assess benefits and flexibility as a way to complement wages.

- Evaluate the process of implementing an ED retention framework and the actual and projected ED tenures over time.

7.2 Implementation Strategy

As the Koop is a member-driven co-operative, engaging them and securing their support is the first step towards pursuing recommendations. Recommendation two is to continue and expand current Koop activities. Thus, these findings reinforce the need for sustained resources directed toward this area. Notably, most of the recommended activities outlined are outside Koop's current capacity in terms of budget requirements and staff time. Therefore, securing project funding or reallocating resources will be critical to their realization.

8.0 Conclusion

In recent years, the widely observed nonprofit leadership turnover phenomenon has similarly challenged the local Koop membership. As executives oversee the carrying out of their agencies' missions, their centrality to their CSO's success cannot be understated. Thus, retaining qualified, thriving executives should be a top priority for these organizations and their boards.

This study examined whether shared leadership and its constructs provide protective effects for community services organizations' executive director retention. Its findings established a connection, illustrating that shared leadership relies on interconnected constructs that fluctuate in strength over time. It also showed that shared leadership can manifest in different leadership contexts, from senior leadership teams to co-leadership models, and even in cultures with no formal leadership responsibilities named outside of the executive themselves. Mission motivation and trust surfaced as foundational to shared leadership and ED retention. Perceived organizational support and team heterogeneity showed the widest variation across agencies and presented the most significant opportunity for cultural improvement. As the highest ranking in shared leadership, co-leadership models demonstrated a strong promise of ED retention. This study's successful models dispelled most the negative preconceptions interviewees held toward co-leadership. The notable difference in retention between executives with high-ranking shared leadership cultures and those struggling demonstrates that building a shared leadership culture is worth prioritizing.

What follows is an invitation to CSOs to examine how their agency embodies shared leadership, investigate what could be improved, and formalize their executive retention strategy. While a wealth of literature on shared leadership's benefits exists in the academic sphere, further inquiry should map out another one of shared leadership's benefits as a generalizable, transferable effect - executive retention. Furthermore, the connection between co-leadership models in the community services sphere and their relationship with shared leadership is unchartered.

Activating shared leadership could be the difference between successive executive turnover and sustainable leadership. A healthy community services organization under stable leadership will ultimately improve countless lives in our communities. This study profiles a new way forward: to support executives in thriving rather than surviving the isolation and burnout we have come to accept as an unavoidable consequence of the ED role. As the research here demonstrates, with shared leadership in action, it does not have to be a foregone conclusion.

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Appendices

Appendix A: Invitation to Participate Email

As a graduate student with the School of Public Administration at UVic, I am reaching out to invite you to be part of a study investigating executive director retention at local community services organizations. The research project client, Kootenay Boundary Community Services Co-operative (KBCSC), myself, and Dr. J. Barton Cunningham, Academic Supervisor and Professor at UVic, are interested in better understanding what factors support executive director retention at community social service organizations.

More specifically, the intention is that by gaining a better understanding of the regional executive and board perspectives, a framework can be developed to support organizations with this pivotal issue into the future.

As such, I am interviewing current and past executives or interim leads at community service organizations, and their board members. You were selected from the Kootenay Boundary Community Services Co-operative membership list to share your perspective on this matter. I would like to invite you to participate in an interview. This interview is anonymous, confidential and completely voluntary. ***Your decision to participate will not impact the services you receive as a member of the Co-operative****. I will be conducting research in a student capacity with the KBCSC board as my project client; I will not be approaching the research from my KBCSC executive director role.*

About the interview: Your participation is completely voluntary. Interviews will take approximately 60-75 minutes and will be conducted in person or over zoom. You can refuse to answer any questions you are uncomfortable with. Whether you participate or choose not to participate is confidential. Please be assured that all information provided by you will be kept STRICTLY CONFIDENTIAL. Your name will never be associated with any of the comments you make. We are simply interested in the collective responses of a number of people who offer a perspective on this issue. Only the researcher and academic supervisor(s) will have access to the data. Your organization will not have access to the raw data.

For board members: if another board member is better suited to answering these questions due to subject matter or time availability, please do forward along this invitation.

Outcome of the research: ***I*** *intend to take your responses, and those of other people we interview, and develop a report for the School of Public Administration to fulfill the capstone research requirement. A short report for local community service organizations on the findings of shared leadership on executive director retention will also be shared.*

If you are interested in participating in this study, please find the research consent form attached for your review and signature in advance. Please let me know if you have questions about this study.

Suggested ***zoom or in person meeting*** *times, based on current availability. Please let me know your preferred time, or an alternative that works better on your end.*

[DATE SELECTION]

Thank you for your consideration,

Hannah Smith

UVic Graduate Student, School of Public Administration · 604.600.1164

To contact the study's academic supervisor, University of Victoria Professor Dr. J. Barton Cunningham, call 250.598.9878 or email bcunning@uvic.ca.

Appendix B: Participant Consent Form

Participant Consent Form

Shared Leadership's Impact on Kootenay Boundary Community Services Organizations'

Executive Director Retention Study

You are invited to participate in a study entitled "Shared Leadership's Impact on Kootenay Boundary Community Services Organizations' Executive Director Retention" that is being conducted by Hannah Smith.

Hannah Smith is a graduate student in the department of School of Public Administration at the University of Victoria and you may contact her if you have further questions by email at hannahsmith604@outlook.com or 604.600.1164.

As a graduate student, I am required to conduct research as part of the requirements for a MA, Community Development degree. It is being conducted under the supervision of Barton J. Cunningham. You may contact my supervisor at 250.598.9878 or bcunning@uvic.ca.

This study is also being conducted for a client, Kootenay Boundary Community Services Co-operative. The contact there is the Board Chair, Lena Horswill, at lenahorswill@gmail.com or 250.777.3925.

Purpose and Objectives

The purpose of this research project is to develop a better understanding of a leadership model, which will contribute to local community service organizations' executive director retention strategy. A report from the findings will then illustrate five key themes on how a shared leadership model might support retention at community services organizations in the Kootenay-Boundary/Columbia Basin regions.

Importance of this Research

Research of this type is important because the knowledge gained through this research will provide insights to guide strategic direction for local community service organizations' executive retention, an ongoing challenge in this sector. Ultimately, supporting the delivery of their missions, and serving the clients of these nonprofits who depend on their success.

Participants Selection

You are being asked to participate in this study because of your current or former role as a board member or senior staff of a Kootenay Boundary Community Services Co-operative member organization; your insights will be helpful to this study.

What is involved

If you consent to voluntarily participate in this research, your participation will include a semi-structured interview, over zoom or in-person, that will take approximately 60-75 minutes.

The questions will ask about specific experiences related to your organization's shared leadership practices and retention of the executive director position. Several examples of the types of questions that will be asked are below:

Can you tell me about a time you felt particularly valued by your organization?

Can you tell me about one of your less favourite or least skilled areas under the role, and if there are teammates, board members or volunteers that support you with this?

Can you tell me about a time your team disagreed with or had varied views on an organizational decision?

An audio or audio-visual recording and notes will be taken with your permission. A transcription will be made. This recording will only be seen by the researchers, and your answers will be shared in a manner that separates your response from any identifiable characteristics.

Inconvenience

Participation in this study may cause some inconvenience to you, including your time.

Risks

There are no known or anticipated risks to you by participating in this research.

Benefits

The potential benefits of your participation in this research include the findings gained from this research being shared back with participants, to support their community services organization's executive director's retention.

Voluntary Participation

Your participation in this research must be completely voluntary and confidential. If you do decide to participate, you may withdraw at any time without any consequences or any

explanation. If you do withdraw from the study your data will be destroyed and excluded from the published findings.

Anonymity and Confidentiality

In terms of protecting your anonymity, all recordings will be stored on the researcher's personal password-protected devices or accounts. Transcriptions and data analysis will use pseudonyms for participants and any published findings will attempt to remove participants' identifiable features. Through context, some information may be identifiable by knowledgeable individuals. In those circumstances, the researcher will assess the risk level to participants, and prioritize their anonymity when being identified could be detrimental to a participant's employment or volunteer role or an organization's reputation.

When being interviewed, participants are asked to refrain from naming individuals outright or providing identifying details, where possible.

Dissemination of Results

It is anticipated that the results of this study will be shared with others in the following way: through the researcher's Masters' project defense and publication, the shortened report version shared with Kootenay Boundary Community Services Co-operative members and on its website, to stakeholders (sector funders and advocates), at relevant conferences, and in the media. It may also be submitted to scholarly journals as an article.

Disposal of Data

Data from this study will be disposed of after three years following the research's ethical approval (Summer 2026). It stored in a locked cabinet at the researcher's home, or on the researcher's password protected personal computer or password protected flash drive (kept in a locked cabinet).

Contacts

Individuals that may be contacted regarding this study include:

Researcher: Hannah Smith hannahsmith604@outlook.com or 604.600.1164.

Academic Supervisor: Barton J. Cunningham bcunning@uvic.ca or 250.598.9878

Project Client: Kootenay Boundary Community Services Co-operative, Board Chair, Lena Horswill lenahorswill@gmail.com or 250.777.3925.

In addition, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Human Research Ethics Office at the University of Victoria (250-472-4545 or ethics@uvic.ca).

Your signature below indicates that you understand the above conditions of participation in this study, that you have had the opportunity to have your questions answered by the researchers, and that you consent to participate in this research project.

Name of Participant	*Signature*	*Date*

Visually Recorded Images/Data

Participant to provide initials, *only if you consent*:

- Videos may be taken of me for: Analysis _____

Future Use of Data

PLEASE SELECT STATEMENT:

I consent to the use of my data in future research: _____ (Participant to provide initials)

I **do not** consent to the use of my data in future research: _____ (Participant to provide initials)

I consent to be contacted in the event my data is requested for future research: _____ (Participant to provide initials)

A copy of this consent will be left with you, and a copy will be taken by the researcher.

Appendix C: Executive Director Interview Introduction & Consent Script

Press record & transcribe [press closed caption → English]

The Kootenay Boundary Community Services Co-operative and University of Victoria graduate student, Hannah Smith, under the supervision of UVic Professor and academic supervisor, Dr J. Barton Cunninham, are interested in better understanding what factors support executive director retention at community social service organizations.

More specifically, we hope that by gaining a better understanding of the regional executive and board perspectives, we may be able to create a framework to support organizations with this pivotal issue into the future.

As such, we are interviewing current and past executives or interim leads at community service organizations, and their board members. You were invited from the Koop membership list to share your perspective on this matter.

This interview is anonymous and confidential. Your participation is voluntary. You can refuse to answer any questions you are uncomfortable with. Whether you participate or choose not to participate is confidential. Your name will never be associated with any of the comments you make. We are simply interested in the collective responses of a number of people who offer a perspective on this issue. Only the researcher and academic supervisor(s) will have access to the data. Your organization will not have access to the raw data. Code numbers, or pseudonyms will be used when presenting findings in the report, removing identifying features.

Questions will prompt you to reflect on your experiences, and it may be relevant to discuss others in the context of your answers. Where possible, you are encouraged to refrain from using individuals' names or other identifiable features. If it is not possible, the researcher will maintain confidentiality through removing identifiable features.

The questions we will ask are mostly open-ended. In responding, we encourage you to reflect on your experiences in this organization. Then you will be asked to share your ideas on the topic, and what might be useful for another community service organization navigating a similar situation.

We intend to take your responses, and those of other people we interview, and develop a report for the School of Public Administration.

Before we begin, do you have any questions?

Let's begin.

Executive Director Interview Guide

- = a supplementary prompt, if needed.

[ ] = directions to interviewer, or conditional question

1. **Establishing organizational leadership context (part 1)**

1a probe. *How long have you been in the executive director role?*

1b probe. *Is this your first ED role?*

1c probe. *How long was the organization's previous executive director in their role? And if you can describe the context in which you stepped into the role.*

[if co-ed model]

1d probe *Can you outline how your coleadership team divides the role and responsibilities?*

[all participants]

2. **Trust:** faith in team's discretion, competency, and integrity. To enact trust, leaders must prioritize engaging in coaching, support and adapting their way of doing things, it is multi-directional and leaders must not be threatened by a loss of "psychological territory."

2a probe. *Please describe a time in which you entrusted a team member to do a task or make a decision that is traditionally under the executive director's job description?*

- *Is this a frequent type of event?*
- *How did you support them through this?*
- *What went well? What went not so well?*
- *What did you learn?*
- *What did your team member(s) learn?*
- *Was this easy for you or challenging?*

Ideas? [e.g. how might advise a fellow executive director on making the decision to share job duties where advantageous?]

2b probe. *Please describe the coverage plan that gets enacted when you go on vacation?*

- *What duties are passed over to team members?*
- *What duties are put on hold?*
- *How often do you check in with your team? How often to they check in with you?*
- *Does the board get involved?*
- *How stressful is this process for you?*

Ideas? [e.g. What advice would you give to an ED preparing to take time away?]

2c probe *Can you tell me about a time you needed to make a decision that might normally be reviewed by the board but for some reason (e.g. time constraints, their inaccessibility, emergency) was not?*

- *What happened?*
- *What went well, what went not so well?*

Ideas? [Do you have suggestions on managing these types of situations?]

3. **Perceived Organization Support:** "the extent to which the organization values [employees'] contributions and cares about their well-being" (Kurtessis et al., 2017, p. 1855), can be demonstrated by "fair rewards" (Grille et al., 2015).

3a probe. *Can you tell me about a time you felt particularly valued by your organization?* [e.g. were recognized for your efforts through expressed appreciation, could be words, or a raise, etc.]

- *What happened? What was the outcome?*
- *Were you surprised by this?*

3b probe. *Can you tell me about a time you felt you particularly demonstrated valuing an employee or employees?*

- *What happened?*
- *Is this sort of event a frequent one?*

Ideas? [Do you have suggestions for promoting this type of supportive culture for executives? For their staff?]

3c probe. *Can you tell me about a time you felt undervalued by your organization?*

- *What happened? What was the outcome?*
- *Were you surprised by this?*

4. **Team heterogeneity:** diverse skillsets and knowledge within a team are embraced.

4a probe. *Can you tell me about one of your less favourite or least skilled areas under the executive director role, and if there are teammates, board members or volunteers that support you with this?*

- *How often do you lean on others for support?*
- *Is it comfortable asking for help?*
- *How does this support make your job more manageable?*

[if organization has a co-ED model]

4b probe. *Can you tell me about a time you felt particularly satisfied with the co-ED model?*

- *What happened?*
- *Who was involved?*
- *What were the outcomes?*

4c probe. *Can you tell me about a time you felt particularly dissatisfied with the co-ED model?*

- *What happened?*
- *Who was involved?*
- *What were the outcomes?*

Ideas? [what would you say to other organizations about adopting a co-ED model?]

[resume for all participants]

5. **Voice:** active participation and input. "Constructive change-oriented communication, participation in decision making, and involvement in key processes" **(**Van Dyne & Lepine, 1998).

5a probe. *Can you tell me about a time your team or an employee disagreed with you or had varied views on an organizational decision?*

- *What happened? What was the outcome?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*

5b probe. *Can you tell me about a time you asked for team input and did not receive the response you were hoping for? How was this resolved?*

- *What happened? What was the outcome?*
- *If it was a case of feedback, how was it elicited? How was it received?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*

5c probe. *Can you tell me about a time you disagreed with the board or certain board members on an issue? How was this discussed and resolved?*

- *What happened? What was the outcome?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*

Ideas? [what suggestions might you make to community service organizations on managing and promoting staff to share their voice constructively?]

6. **Mission motivation**: the level to which the executive feels compelled or inspired to serve the organization's mission.

6a probe. *Can you tell me about a time you felt especially motivated to work for [organization name]?*

- *What happened? Why did this resonate with you?*
- *How common is an experience like this? Do you feel this way often?*

6b probe *What about a time you felt particularly unmotivated? Or even considered leaving this role?*

- *What happened? Why did this memory resonate with you?*
- *How common is an experience like this? Do you feel this way often?*

Ideas? [e.g. how do you think this motivation could be replicated for EDs? What should be avoided?]

7. **Succession Planning:** the planning, strategizing and preparation for executive leadership change.

7 probe. *Tell me about the last time you engaged in succession planning activities for the executive director role?*

[if further explanation needed: Examples might include readying your organization for an emergency or departure-based leadership change, mentoring staff, creating policy, cross training your job duties, discussing your eventual successor with the board]

- *Was this a solo endeavour?*
- *Were your team members involved? Or board members?*
- ***How frequent an event is this?*
- *Is this a formal or informal process?*

Ideas? [How important do you think succession planning is? What would you recommend to organizations like yours in how to create a successful ED transitions?]

8. **Establishing organizational leadership context (part 2)**

[for staff that have had a long tenure in ED role (i.e. 5+ years, informed by question 1a]

8a i probe. *What factors have contributed to your long tenure in this role?*

[OR for former EDs, only ask where question has not been answered through previous questions]

8a ii probe. *What factors contributed to you leaving the ED role?*

[for all interviewees]

8b probe. *How long do you anticipate being in this role?*

Do you have a successor in mind? Or a sense of who the board might approach or seek out?

8c *Do you think there are specific challenges and/or opportunities in your [city name] community surrounding ED retention that are important to discuss? [talent pool/remoteness]*

8d *The academic literature outlines 5.5 years for the average nonprofit ED Tenure. And generally they are "one and done" in the position, not carrying their expertise to a new organization. Do you have any thoughts on these trends?*

8e *When do Co-ED or shared leadership models work? When don't they?*

9 probe. *Is there anything related to these topics that I didn't ask that you think would be important to know?*

Concluding the interview – Thank participant and request their permission for any follow up questions in case clarification is needed.

Appendix D: Board Interview Guide & Consent

Press record & transcribe [closed caption→ English]

The Kootenay Boundary Community Services Co-operative and University of Victoria graduate student, Hannah Smith, under the supervision of UVic Professor and academic supervisor, Dr J. Barton Cunninham, are interested in better understanding what factors support executive director retention at community social service organizations.

More specifically, we hope that by gaining a better understanding of the regional executive and board perspectives, we may be able to create a framework to support organizations with this pivotal issue into the future.

As such, we are interviewing current and past executives or interim leads at community service organizations, and their board members. You were invited from the Koop membership list to share your perspective on this matter.

This interview is anonymous and confidential. Your participation is voluntary. You can refuse to answer any questions you are uncomfortable with. Whether you participate or choose not to participate is confidential. Your name will never be associated with any of the comments you make. We are simply interested in the collective responses of a number of people who offer a perspective on this issue.

Questions will prompt you to reflect on your experiences, and it may be relevant to discuss others in the context of your answers. Where possible, you are encouraged to refrain from using individuals' names or other identifiable features. If it is not possible, the researcher will maintain confidentiality through removing identifiable features.

Only the researcher and academic supervisor(s) will have access to the data. Your organization will not have access to the raw data. pseudonyms, will be used when presenting findings in the report, removing identifying features.

We intend to take your responses, and those of other people we interview, and develop a report for the School of Public Administration, and a shortened one for the Koop and its members.

Before we begin, do you have any questions?

Let's begin.

Board Interview Guide

- = a supplementary prompt, if needed.

[ ] = directions to interviewer, or conditional question

1. **Establishing organizational leadership context (part 1)**

1a probe. *How long have you been in the board director role at [organization]?*

1b probe. *Is this your first board role?*

1c probe. *How were you recruited to the board?*

2. **Trust:** faith in team's discretion, competency, and integrity. To enact trust, leaders must prioritize engaging in coaching, support and adapting their way of doing things, it is multi-directional and leaders must not be threatened by a loss of "psychological territory."

2 probe. *Please describe a time in which the board entrusted the executive director to do a task or make a decision that is traditionally under the board's responsibility?*[or *describe a time the ED performed a task that is normally under the board's purview, perhaps due to an emergency circumstance, and what happened?*]

- *What went well? What went not so well?*
- *What did you learn?*
- *What did you learn?*
- *Was this easy for the board or challenging?*

[If no example, can you reflect on how a situation like this might unfold?]developing trust with an ED

2b probe. *Now, please describe a time in which the board performed a task normally under the ED's responsibility and how that went.*

Ideas? [e.g. how might advise a fellow board on making the decision to trust an ED to step in where advantageous?]

3. **Perceived Organization Support:** "the extent to which the organization values [employees'] contributions and cares about their well-being" (Kurtessis et al., 2017, p. 1855), can be demonstrated by "fair rewards" (Grille et al., 2015).

3a probe. *Can you tell me about a time you felt the board particularly demonstrated valuing your ED?* [e.g. they were recognized for their efforts through expressed appreciation, could be words, or a raise, etc.]

- *What happened? What was the outcome?*
- *How often is this appreciation expressed? In what ways?*

3b probe. *Can you tell me about a time you felt the board may have missed an opportunity to demonstrate valuing its ED?*

- *What happened? What was the outcome?*
- *Were you surprised by this?*

Ideas? [Do you have any additional suggestions on how organizations can make their executives feel valued?]

3c probe. *What efforts have been made to retain your organization's ED? Please be specific.*

- *Examples may include: recognition, a pay raise, bonus, additional time off, award, opportunities for growth and advancement?*
- *What worked well? What was less effective?*

Ideas? [What worked particularly well? What would you advise fellow boards to do to retain their ED?]

4. **Team heterogeneity:** diverse skillsets and knowledge within a team are embraced.

4a probe. *When thinking about your organization's ED's potential areas of growth, can you describe how the organization works through this - whether it be the ED finding solutions, or the board?*

- *Is the strategy effective?*
- *How does this support make your job more manageable?*

[if organization has a co-ED model]

4b probe. *Can you tell me about a time you felt particularly satisfied with the co-ED model? And why it was selected by the board?*

- *What happened?*
- *Who was involved?*
- *What were the outcomes?*

4c probe. *Can you tell me about a time you felt particularly dissatisfied with the co-ED model?*

- *What happened?*
- *Who was involved?*
- *What were the outcomes?*

Ideas? [what would you say to other organizations about adopting a co-ED model?]

[all interviewees]

5. **Voice:** active participation and input. "Constructive change-oriented communication, participation in decision making, and involvement in key processes" (Van Dyne and Lepine, 1998).

5c probe. *Can you tell me about a time you or fellow board member(s) disagreed with the ED on an issue? How was this navigated?*

- *What happened? What was the outcome?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*
- *Is there a formal process for such circumstances?*

Ideas? [what suggestions might you make to community service organizations on managing and promoting staff to share their voice constructively?] a*nd perhaps board members*

6. **Mission motivation**: the level to which the executive feels compelled or inspired to serve the organization's mission.

6a probe. *Can you tell me about the ED's connection to [organization name]'s mission? And organization?*

- *Is this a strong connection?*
- *Do you think it influences their decision to work at [organization]?*

6b probe *Has there been a time you felt [organization]'s ED was particularly unmotivated or disconnected from the mission or organization?*

- *What happened? Why did this memory resonate with you?*
- *How common is an experience like this? Do you think this is a common occurrence?*

Ideas? [e.g. how do you think boards can support motivating EDs? What should be avoided?]

7. **Succession Planning:** the planning, strategizing and preparation for executive leadership change.

7 probe. *Tell me about the last time the board engaged in succession planning activities for the ED role?*

[if further explanation needed: Examples might include preparing with an emergency or departure-based succession plan, creating policy, mandating cross training job duties, discussing eventual successor candidates with the current ED]

- *What happened?*

- *Did this process feel comfortable or uncomfortable?*
- *Was this at the board level? Or done alongside the ED or senior staff?*
- *Were your team members involved? Or board members?*
- *How frequent an event is this?*

Ideas? [How important do you think succession planning is? What would you recommend to boards like yours in how to create a successful ED transitions?]

8. Establishing organizational leadership context (part 2)

[for staff that have had a long tenure in ED role (i.e. 5+ years, informed by question 1a, board member overlap with ED – per first question]

8a i probe. *What factors do you think have contributed to [organization's] ED's long tenure in their role?*

8a ii probe. *Generally EDs hold the role once in their careers, and are in the role for 5.5 years and one and done. What are your thoughts on this?*

[OR for vacant ED roles, only ask where question has not been answered through previous questions]

8b i probe. *What factor(s) contributed to the last ED leaving?*

[for all interviewees]

8 b ii probe. *How long do you anticipate [organization]'s ED being in this role?*

8c probe. *Do you have a successor in mind? Or a sense of who the board might approach or seek out?*

[if CSO had an Interim ED as part of the transition process]

8d probe. *Can you tell me about a positive outcome of the interim ED model? What about a not so positive outcome?*

Ideas? [Would you recommend the Interim ED model to other CSOs? Any recommendations for implementation?]

[for all]

8e probe. *What are your thoughts on co-ed or shared ED roles? When does this work? When doesn't it?*

8f probe. *What are your thoughts on interim executive directors? When does this work? When doesn't it?*

8g probe. *Is there anything related to these topics that I didn't ask that you think would be important to know?*

Concluding the interview – Thank participant and request their permission for any follow up questions in case clarification is needed.

Appendix E: Interim Executive Director/Current Staff Leader Interview Guide & Consent

Press record & transcribe [closed caption → English]

The Kootenay Boundary Community Services Co-operative and University of Victoria graduate student, Hannah Smith, under the supervision of UVic Professor and academic supervisor, Dr J. Barton Cunninham, are interested in better understanding what factors support executive director retention at community social service organizations.

More specifically, we hope that by gaining a better understanding of the regional executive and board perspectives, we may be able to create a framework to support organizations with this pivotal issue into the future.

As such, we are interviewing current and past executives or interim leads at community service organizations, and their board members. You were invited from the Kootenay Boundary Community Services Cooperative membership list to share your perspective on this matter.

This interview is anonymous and confidential. Your participation is voluntary. You can refuse to answer any questions you are uncomfortable with. Whether you participate or choose not to participate is confidential. Your name will never be associated with any of the comments you make. We are simply interested in the collective responses of a number of people who offer a perspective on this issue.

Questions will prompt you to reflect on your experiences, and it may be relevant to discuss others in the context of your answers. Where possible, you are encouraged to refrain from using individuals' names or other identifiable features. If it is not possible, the researcher will maintain confidentiality through removing identifiable features.

Only the researcher and academic supervisor(s) will have access to the data. Your organization will not have access to the raw data. Code numbers, or pseudonyms rather than names, will be used when presenting findings in the report, removing identifying features.

The questions we will ask are mostly open-ended. In responding, we encourage you to reflect on your experiences in this organization. Then you will be asked to share your ideas on the topic, and what might be useful for another community service organization navigating a similar situation.

We intend to take your responses, and those of other people we interview, and develop a report for the School of Public Administration.

Before we begin, do you have any questions?

Let's begin.

Interim ED/Staff Lead Interview Guide

- = a supplementary prompt, if needed.

[ ] = directions to interviewer, or conditional question

1. **Establishing organizational leadership context (part 1)**

1a probe. *How long have you been in the interim executive director role? Can you talk through the circumstances you found yourself in the role?*

1b probe. *Is this your first ED or interim ED role?*

1c probe. *How long was the organization's previous executive director in their role? Can you talk me through the organization's leadership history?*

2. **Trust:** faith in team's discretion, competency, and integrity. To enact trust, leaders must prioritize engaging in coaching, support and adapting their way of doing things, it is multi-directional and leaders must not be threatened by a loss of "psychological territory."

2a probe. *Please describe a time in which you entrusted a team member to do a task or make a decision that is traditionally under the executive director's job description?*

- *Is this a frequent type of event?*
- *What went well? What went not so well?*
- *What did you learn?*
- *How did you support them through it?*
- *What did your team member(s) learn?*
- *Was this easy for you or challenging?*

Ideas? [e.g. how might you advise a fellow interim executive director on sharing certain job duties?]

2b probe. *As an interim ED, do you perform the full job description for the role with [organization name]?*

- *What, if any, duties were transferred to team members or external supports?*
- *What duties have been put on hold?*
- *Does this model work?*
- *Does the board get involved?*

Ideas? [e.g. what do you think is a good way of managing the duties of the executive director in an interim situation?]

2c probe *Can you tell me about a time you needed to make a decision that might normally be reviewed by the board but for some reason (time constraints, their inaccessibility) was not?*

- *What happened?*
- *What went well, what went not so well?*

Ideas? [Do you have suggestions on managing these types of situations?]

3. **Perceived Organization Support:** "the extent to which the organization values [employees'] contributions and cares about their well-being" (Kurtessis et al., 2017, p. 1855), can be demonstrated by "fair rewards" (Grille et al., 2015).

3a probe. *Can you tell me about a time you felt particularly valued by your organization?* [e.g. were recognized for your efforts through expressed appreciation, could be words, or a raise, etc.]

- *What happened? What was the outcome?*
- *Were you surprised by this?*

3b probe. *Can you tell me about a time you felt you particularly demonstrated valuing an employee?*

- *What happened?*
- *Is this sort of event a frequent one?*

Ideas? [Do you have suggestions for promoting this type of supportive culture for executives? What about for their staff?]

3c probe. *Can you tell me about a time you felt undervalued by your organization?*

- *What happened? What was the outcome?*
- *Were you surprised by this?*

Ideas? [Do you have any additional suggestions on how organizations can make their executives feel supported?]

4. **Team heterogeneity:** diverse skillsets and knowledge within a team are embraced.

4a probe. *Can you tell me about one of your less favourite or least skilled areas under the interim executive director role, and if there are teammates, board members or volunteers that support you with this?*

- *How often do you lean on others for support?*
- *Is it comfortable asking for help?*
- *How does this support make your job more manageable?*

[if organization has an interim co-ED/team lead model]

4b probe. *Can you tell me about a time you felt particularly satisfied with the co-leadership model?*

- *What happened?*
- *Who was involved?*
- *What were the outcomes?*

4c probe. *Can you tell me about a time you felt particularly unsatisfied with the co-leadership model?*

- *What happened?*
- *Who was involved?*
- *What were the outcomes?*

Ideas? [what would you say to other organizations about adopting a co-ED model? On an interim basis?]

5. **Voice:** active participation and input. "Constructive change-oriented communication, participation in decision making, and involvement in key processes" **(**Van Dyne and Lepine, 1998).

5a probe. *Can you tell me about a time your team disagreed with or had varied views on an organizational decision?*

- *What happened? What was the outcome?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*

5b probe. *Can you tell me about a time you asked for team input and did not receive the response you were hoping for? How was this resolved?*

- *What happened? What was the outcome?*
- *If it was a case of feedback, how was it elicited? How was it received?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*

5c probe. *Can you tell me about a time you disagreed with the board or certain board members on an issue? How was this discussed?*

- *What happened? What was the outcome?*
- *What went well during this exchange? What went not so well?*
- *What did you learn from this experience?*

Ideas? [what suggestions might you make to community service organizations on managing and promoting staff to share their voice constructively?]

6. **Mission motivation**: the level to which the executive feels compelled or inspired to serve the organization's mission.

6a probe. *Can you tell me about a time you felt especially motivated to work for [organization name]?*

- *What happened? Why did this resonate with you?*
- *How common is an experience like this? Do you feel this way often?*

6b probe *What about a time you felt particularly unmotivated? Or even considered leaving this role?*

- *What happened? Why did this memory resonate with you?*
- *How common is an experience like this? Do you feel this way often?*

Ideas? [e.g. how do you think this motivation could be replicated for EDs? What should be avoided?]

7. **Succession Planning:** the planning, strategizing and preparation for executive leadership change.

7 probe. *Tell me about the last time you engaged in succession planning activities for the executive director role?*

[if further explanation needed: Examples might include readying your organization for leadership change, mentoring staff, creating policy, cross training your job duties, discussing your eventual successor with the board]

- *Was this a solo endeavour?*
- *Were your team members involved? Or board members?*
- *How frequent an event is this?*
- *Is this a formal or informal process?*

Ideas? [How important do you think succession planning is? What would you recommend to organizations like yours in how to create a successful ED transitions?]

8. **Establishing organizational leadership context (part 2)**

[for staff that have had a long tenure in interim ED role (6 months or more, question 1a]

8a i probe. *What factors have contributed to your long tenure in the interim role?*

Thoughts on co-interim leads? When is this appropriate for CSOs? When is it not?

[for all interviewees]

8b probe. *How long do/did you anticipate being in this role?*

8c probe. *Do you think that the interim-ED model supports long-term ED retention?*

8d probe. *Any additional Thoughts on having an interim ED? When is it appropriate? When is it not ideal?*

8e probe. *Is there anything related to these topics that I didn't ask that you think would be important to know?*

Concluding the interview – Thank participant and request their permission for any follow up questions in case clarification is needed.

Appendix F: Former Executive Director & Project Client Interview Guide & Consent Script

Press record & transcribe [closed caption→ English]

The Kootenay Boundary Community Services Co-operative and University of Victoria graduate student, Hannah Smith, under the supervision of UVic Professor and academic supervisor, Dr J. Barton Cunninham, are interested in better understanding what factors support executive director retention at community social service organizations.

More specifically, we hope that by gaining a better understanding of the regional executive and board perspectives, we may be able to create a framework to support organizations with this pivotal issue into the future.

As such, we are interviewing current and past executives or interim leads at community service organizations, and their board members. You were invited from the Koop membership list to share your perspective on this matter.

This interview is anonymous and confidential. Your participation is voluntary. You can refuse to answer any questions you are uncomfortable with. Whether you participate or choose not to participate is confidential. Your name will never be associated with any of the comments you make. We are simply interested in the collective responses of a number of people who offer a perspective on this issue.

Questions will prompt you to reflect on your experiences, and it may be relevant to discuss others in the context of your answers. Where possible, you are encouraged to refrain from using individuals' names or other identifiable features. If it is not possible, the researcher will maintain confidentiality through removing identifiable features.

Only the researcher and academic supervisor(s) will have access to the data. Your organization will not have access to the raw data. Pseudonyms, will be used when presenting findings in the report, removing identifying features. Due to context, some things may not be able to remain anonymous. In those cases the researcher will decide on inclusion during publication based on the risk level to the participant and/or organization, prioritizing <u>their reputation.</u>

The questions we will ask are mostly open-ended. In responding, we encourage you to reflect on your experiences across the various community service organizations you have worked at or been involved with. You may use your personal experiences, or those observed over the years. Then you may be asked to share your ideas on the topic, and what might be useful for another community service organization navigating a similar situation.

We intend to take your responses, and those of other people we interview, and develop a report for the School of Public Administration, and a shortened one for the Koop and its members.

Before we begin, do you have any questions?

Let's begin.

Former Executive Director & Project Client Interview Guide

1. **Establishing organizational leadership context (part 1)**

1a probe. *Can you describe your leadership employment history at community service organizations?*

- *How did you get into the role(s)?*
- *Have you stepped in during periods of stability or organizational crisis?*
- *How many times have you done the ED role?*

2. Trust: faith in team's discretion, competency, and integrity. To enact trust, leaders must prioritize engaging in coaching, support and adapting their way of doing things, it is multi-directional and leaders must not be threatened by a loss of "psychological territory."

2a probe. *Can you provide an example of a board that has demonstrated trust in their ED? What was the outcome?*

2b probe. *Can you provide an example of a board that has demonstrated a lack of trust in their ED? What was the outcome?*

Ideas? [e.g. how might advise a fellow board on building a trusting relationship with an ED?

3. Perceived Organization Support: "the extent to which the organization values [employees'] contributions and cares about their well-being" (Kurtessis et al., 2017, p. 1855), can be demonstrated by "fair rewards" (Grille et al., 2015).

3a probe. *Can you provide specific examples of organizations demonstrating valuing their ED?*

3b probe. *Can you provide specific examples of organizations missing the opportunity to demonstrate valuing their ED?*

Ideas? [Do you have any additional suggestions on how organizations can make their executives feel valued?]

4. Team heterogeneity: diverse skillsets and knowledge within a team are embraced.

4a probe. *What competencies do you generally see CSO EDs excel in?*

4b probe. *What areas do they struggle?*

4c probe. *What was your least skilled or favourite part of the job and how did you manage it? Did you have board/volunteer or collegial support in it?*

4d probe. *Can you provide examples of how EDs are supported in areas of growth?*

4e probe. *When do co-leadership models work for community service organizations? When don't they?*

[all interviewees]

5. Voice: active participation and input. "Constructive change-oriented communication, participation in decision making, and involvement in key processes" (Van Dyne and Lepine, 1998).

5a probe. *What role does voice play in ED retention? Can you think of examples where EDs have been particularly able to communicate well with their board? Or examples where they've been unable to? What were the outcomes?*

Ideas? [what suggestions might you make to community service organizations on managing and promoting staff to share their voice constructively? and perhaps board members]

6. Mission motivation: the level to which the executive feels compelled or inspired to serve the organization's mission.

6a probe. *What role does connection to an organization's mission play in ED retention?*

Ideas? [e.g. how do you think boards can support motivating EDs? What should be avoided?]

7. Succession Planning: the planning, strategizing and preparation for executive leadership change.

Ideas? [How important do you think succession planning is? What would you recommend to boards like yours in how to create a successful ED transitions?]

8. Establishing organizational leadership context (part 2)

8a probe. *Do you think there is a preferred length of time for EDs to remain in the role? And if so, why?*

8b probe. *What factors do you think have contributed to organizations with EDs with long tenure in their role?*

8c probe. *Generally, EDs hold the role once in their careers and are in the role for 5.5 years and one and done. What are your thoughts on this?*

8d probe. *What are your thoughts on co-ed or shared ED roles? When does this work? When doesn't it?*

8e probe. *What are your thoughts on interim executive directors? When does this work? When doesn't it?*

8f probes – if not already addressed in interview

- *What trends do you see with ED retention amongst member organizations? And more broadly in the sector?*
- *Do you see a difference across organization services or organization size?*
- *What threats do you see to ED retention at community services organizations?*
- *What unique challenges do the various communities (e.g. village/city that are rural/remote) face retaining EDs at community services organizations?*
- *Any unique opportunities?*
- *Have you seen any unique effective retention strategies?*
- *If you had to name the top stressors in the ED role, what would you say?*
- *Do you think EDs are prepared generally, when taking on this role?*
- *How can we better support EDs working at CSOs*

8g probe. *Is there anything related to these topics that I didn't ask that you think would be important to know?*

Concluding the interview – Thank participant and request their permission for any follow up

Appendix G: Analytic Memo Template

Interview Date:

Participant Pseudonym:

Participant Type: (Interim/Current ED, Co-ED, Board)

Interview Overview:

Key Concepts on Shared Leadership (POS, Voice, Team Heterogeneity, Trust, Mission Motivation, Vision)? Retention?

Interviewer's Reflexivity Observations:

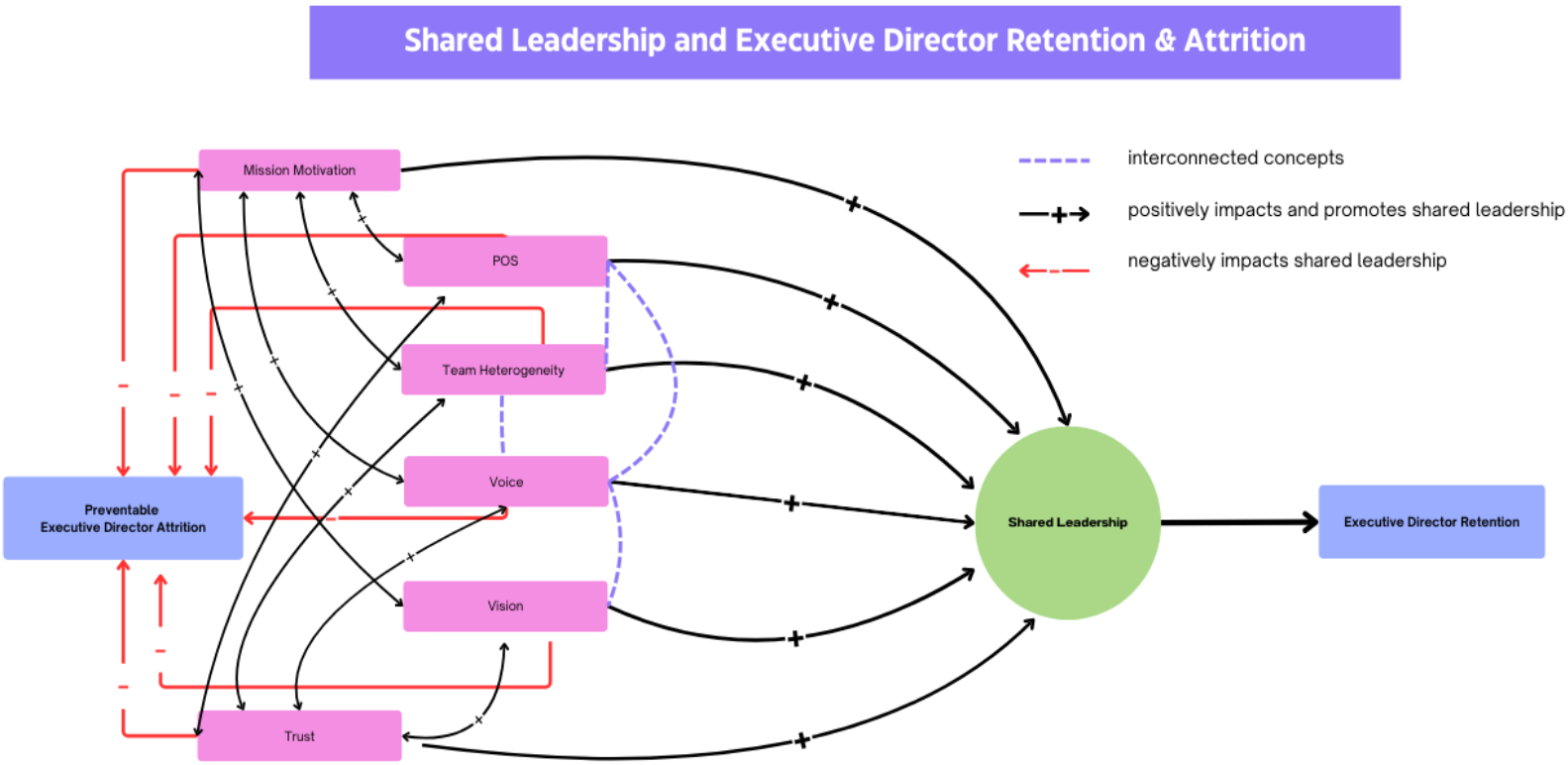
Appendix H: Shared Leadership Assessment

Construct Categorization*	Definition & Examples
High	Interviewee consistently across various scenarios/interview expressed strength and confidence in construct. *Examples:* *Trust - an event or interpersonal dynamic led to breach of trust between board and ED, but have repaired entirely, possibly leading to a stronger relationship.* *Team Heterogeneity: Diverse skillsets well-established in agency and embraced. Leadership and decision making shared with subject experts where relevant.* *POS: board or colleague providing words of affirmation/appreciation, remuneration recognition / "fair rewards," coaching or mentorship provided, professional development opportunities, support during family or health emergency.*
Mixed	Construct is more spread across the spectrum. It is high in some contexts and interpersonal dynamics and weaker in others. *Example:* *Trust: Differing levels of trust across stakeholders or scenarios demonstrated (e.g. high amongst some team members but not with others).*
Developing	Developing construct is prioritized but requires time. Occurred more often with new EDs, or when team was undergoing change management. *Examples:* *Trust: recovering trust from a breach with former executive.* *Team Heterogeneity: a new ED with support of team, board and senior leadership. Collective commitment to identifying gaps in team skillsets and perspectives and bringing on support.* *Or a small team with plan to contract support for ED in areas of weakness or insufficient bandwidth.*
At Risk	Construct extremely weak and/or threatened. A sense of acute urgency or longtime strain is present. When at risk, the interviewee communicated it is leading to ED dissatisfaction in the role.

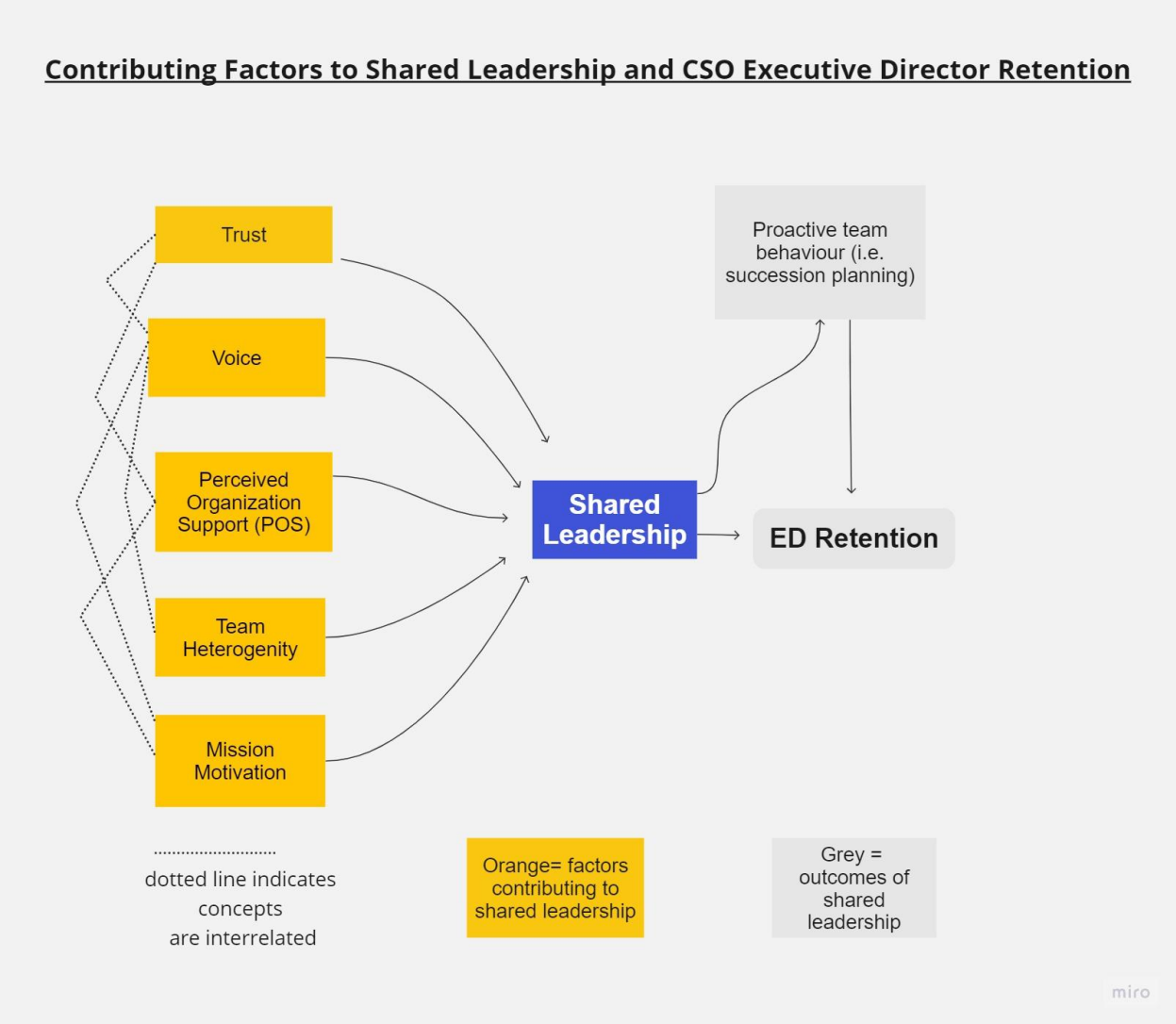
	Example: *Trust: trust breached between ED and stakeholder(s) (i.e., staff, board, volunteers, community, funder), no indication it can be repaired, and an indication it will lead to attrition.*
Unclear	Inconsistent or insufficient data to assess construct. *Example:* *Team Heterogeneity: a board member who is not involved in operations being asked about the diversity of team members skillsets.*

* Constructs rating by agency, not individual interviewee (roughly half of the agencies had only one interviewee).

Appendix I: Final Conceptual Framework



Appendix J: Initial Conceptual Framework Submitted with the Proposal



Appendix K: Mission Motivation Expanded

Table K.1

Mission Motivation & Predicted Executive Director Attrition

	Mission Motivation Rating				
Predicted ED attrition in next 2 years?	**Unclear**	**At Risk**	**Developing**	**Mixed**	**High**
Yes - potentially preventable					5
Yes - likely unpreventable					3
No					7

Findings. Uniformly, all interviewees expressed themselves or their current ED as highly committed to their agency's mission and, by extension, the organization (see Table K.1). A board member described this dedication, thinking that "committed values and beliefs in the mission of the agency" are pretty much a prerequisite, and they have never doubted this in the executives they have encountered over their decades volunteering. An ED recounted the meaning derived from this work,

> I had a completely different life before I came into human services and…I don't have to do [this]. I have other transferable skill sets...I do this because it allows me to be part of my community in a way that matters to me.

The project client described this commitment as essential in helping them stick it out when the going gets tough, which is often; "there's always challenges. It's one thing after another…for you to stay in that role, you have to feel connected." An executive's reflection concurred, "I think I would have left a long time ago if I didn't believe in the mission, and I love this organization." This is an outright verbalization of the protective effects of mission motivation. Another ED described their pride in their agency's work and how they are "good by association" in their community.

This dedication was also demonstrated through multiple EDs articulating that they only took on this role to ensure the agency's stability, not as an exciting next chapter in their careers. Some described being tapped on the shoulder by colleagues or board members, sometimes multiple times, to consider taking on the role. As one ED put it, "Because [we're a] small community. You know…I didn't ask for this job. I was asked if I was willing to do it." Some of these executives reflected that despite being an agency employee or volunteer beforehand, they had no idea what they were getting into. Others held no illusions about the incredible difficulties they would face, but dedication toward the agency's mission won out; one executive described thinking,

> I'll just step in like on an interim basis. And so, I …stepped in as the ED thinking that it might be temporary, and then, like a week later, just decided…might as well just do this kind of for a bit.

Another way mission motivation manifested was through serving the staff and supporting their work towards a shared mission. One ED described what motivates them: "the team…their genuine [desire] to serve their community and to help people live better lives." Another experienced ED described the connection of like-minded colleagues, "I still have a passion for the work. I…love the people in this building. They do great work." A further longtime ED described feeling "enthusiastic" when the staff's good work translates into community impact, making them want to support the staff personally.

Mission Motivation – At Risk. While mission motivation appears to be central to executives taking and remaining in the role, it is not unshakeable. The moments EDs described feeling adrift from their agency's mission were threatening to retention. They often stemmed from systemic challenges in the sector, like when relationships with funders feel contractual or transactional versus more relational or collaborative. One ED described feeling unmotivated by "hierarchical or patriarchal systems. That's [when] I feel down and out and undervalued…it just doesn't feel like it's in my control." A board member observed something similar with their ED, that "bureaucracy" and all the hoops they jumped through for naught were getting to them. Lastly, one longtime ED referenced a challenging chapter where the board was taking the organization in a direction, they felt misaligned with their values. They felt it was time they considered leaving their role, though they managed to find a satisfactory path forward through difficult conversations. This construct dovetailed with the vision the ED held for the agency. They now felt they had put this behind them and the board.

Discussion. Like trust, mission motivation appears to be given to executives, with all agencies rating highly. It is also a moderator filtering through every other measured shared leadership construct on the surface. This commitment flowed through all conversations with interviewees, almost like their raison d'être explaining involvement with their agency. This connection to the mission may be seen as entirely positive. And yet, there may be potential downsides, including staff staying in role long after they should depart or taking on a role they are ill-suited for because their passion for this work is overwhelming. Notably, the sense of duty and obligation was similarly high in EDs with predicted short tenures. High mission motivation also decreases pressure to adjust dysfunctional leadership roles. For example, in the compensation area, many directors noted that they believed the wage was insufficient for others but were making it work themself. In the short term, this may benefit organizations but is not conducive to sustainability. Mission motivation coupled with low resources can also be a fast track to burnout and stress. When the investment in the organizational outcomes and supporting clients is so high, drawing healthy boundaries may be more challenging. One ED said plainly, "I think that our mission is the only reason that I'm here at this organization." This comment outlines that it can be the anchor to bring in an ED and keep them for a time, but as this ED also described a low POS and

team heterogeneity culture, the construct in not a panacea. While this ED may do a fantastic job, the scenario also shows how work needs to be done to cultivate more candidates who do, in fact, see this as part of their long-term career, not something they jumped into to hold down the fort temporarily. While a net positive, mission motivation could be a crutch for agencies, bringing on leaders who are not overly enthusiastic about the role but feel obligated to serve or pressuring leaders to stay when they should be moving on.

Mission motivation could also be taken for granted; because it was uniformly high, mission motivation "at risk" may seem unnecessary to discuss at length. Yet the cracks appear when a diverging ED and board or organizational vision creeps in and as previously discussed, the construct is relied upon too heavily to moderate all other retention aspects. Furthermore, the assumption that an ED's commitment to the CSO cause is enough to sustain them for the long haul is a dangerous one.

Appendix L: Trust Expanded

Table L.1

Trust & Predicted Executive Director Attrition

	Trust Level				
Predicted ED Attrition in Next 2 Years	**Unclear**	**At Risk**	**Developing**	**Mixed**	**High**
Yes - potentially preventable		1	1	1	2
Yes - likely unpreventable*				1	2
No					7

Findings. Trust was generally highly ranked by interviewees, with 11 of the 15 organizations categorized that way; two had "mixed" levels of trust, one as "developing" and one as "at risk" (see Table L.1). Interviewees were asked to discuss trust between ED and board members, and then between the ED and their team, and in a few cases, it stemmed into a discussion of trust between the agency and its community and funders. Related to the ED-Board trust dynamic, in many cases, the act of hiring an ED was seen as a defining moment solidifying trust from the board. Most EDs were internal candidates, and many shared that the foundation of trust had already been laid prior to their appointment to the role. As one executive stated, "I've entered into this job with all of that hard work of building trust already [done]." Another shared similarly, "I think the degree of trust is quite large. [The board] had a lot of trust in me to kind of take this leap of faith, and let me take on this position to begin with."

Several EDs discussed the necessity of trust because of the board's knowledge gap in the organization's work. When asked to theorize how to build trust within agencies, transparent communication was repeatedly underlined. As one board member succinctly stated, "Communication is paramount." Almost every board interviewee brought up the executive report at board meetings as an important communication and trust-building tool.

Regarding trust between an executive and their staff, a longtime ED attributed their retention to gaining the team's trust:

> That was a that was a big part for me and that made it easier…and kept me there because I could go to these people and …once they really started to see and trust me and believe in me, then…there was such a wealth of knowledge coming from folks because they've been through it… they've seen it the organization change. Some were here from the very start of it, [for decades].

Trust was particularly stressed by co-leaders and described as integral to the model's functioning. Several interviewees discussed how co-leadership creates an environment of greater

accountability and protects against breaches of trust, such as an executive's potential financial malfeasance.

Trust – At Risk. In the one case where the trust construct was labelled as actively "at risk" within an organization, a challenging dynamic had emerged between ED and staff. The agency interviewee suggested that it was associated with potential attrition. In another case, an ED described a potential loss of trust in the board when they felt their voice was not being heard on a pivotal agency decision. This also caused them to lose perceived organizational support. This was the one time the executive considered leaving their role over many years. Previous cases of breaches of trust between an ED and board or community (within and outside of interviewee organizations) were referenced. Interviewees connected these examples to executives' termination and resignation and, in one case, mentioned how a breach led to human rights and wrongful termination lawsuits. Consequently, these examples created significant reputational risk to the agency. One board member shared deep trust in their agency's executive but cautioned, "We've heard…of the financial malfeasance in [other parts of the] Interior."

Several interviewees reflected on rebuilding trust after their predecessor had broken it with a key stakeholder (e.g., staff, board, clients, community). Therefore, the trust construct was categorized as developing as these leaders discussed the extra work needed and the considerations made to repair it. Recovering from a past executive's breach of trust weighs heavily, a current ED shared, "That's the part that really sucks because…I stepped into that role where I have to answer to all these questions that… I wasn't here for any of it..." As the project client reflected on some of these situations, where trust was eroded from an imbalanced governance dynamic between the board and their executive:

> I do think trust played a role in [some EDs'] departure…. And my impression was that the board [was] kind of like…a rubber-stamping board until it got to such a point where, it became really apparent there needed to be a change.

In cases like these, where the ED was let go due to a breach of trust, new EDs did not report micromanagement or overinvolvement of the board—more the opposite, sharing a desire for a more scrutinizing board. These EDs expressed their focus on demonstrating their trustworthiness and creating processes and culture to prevent this type of recurrence. A longtime board member and community services volunteer observed that the more common phenomenon is a breakdown in an executive's trust in the board rather than the other way around. Overall, the current levels of trust were ranked highly among the agencies surveyed; however, the cases of its breakdown illuminate its potential to lead to ED attrition.

Discussion. Trust is an integral component of shared leadership – it is foundational in its composition but also acts as a moderator, supporting the enactment of all other constructs, except vision, at least directly. The influence of internal candidates seemed to play a significant part in establishing trust between ED and stakeholders. An ED's experience of trust, like mission

motivation, may be a sine qua non. Any breach of trust is a fast track to attrition – the examples of EDs leaving demonstrated this clearly in the findings.

The findings showed how trust is developed via the executive appointment process. This indicates that the recruitment process is integral in establishing a shared leadership culture. It is unknown whether this is specific to internal hires or first-time EDs who felt honored by the recognition and investment in them as the new leader. Therefore, it would be prudent for the board and CSO staff to commit to building incumbent EDs' confidence through the interview and onboarding process.

In cases where the past ED was let go due to a breach of trust, the new ED surprisingly tended to share a desire for a more scrutinizing board, conflicting with the literature (see Stewart, 2016, p. 52). Their sensed distance from the board may be due to burnout from managing the ED transition and the possible operational role they took on during that period. It is important to reflect on the potential for their isolation in these circumstances. If the ED came in following a crisis, they wanted to be trusted but also felt that there was a collective responsibility for transforming culture. It may also be because, in these cases, the incoming ED was already known to the board as an internal hire, indicating trust was previously established. Nevertheless, the leader's commitment to demonstrating integrity and implementing safeguards to protect organizations from executive mismanagement is an interesting dynamic; it could potentially create ED isolation and should be further studied.

A board member with decades of experience serving CSOs mentioned that they more often witnessed a lack of trust from the ED towards the board. This was not observed in other interviews; executive respondents spoke highly of their board and trusted them even in contentious situations. Further inquiry is needed on this topic.

Trust and its Future Leadership Implications. The data suggest that while EDs report trust in their team, they also report a lack of activity in identifying and mentoring potential successors. They may believe their team is not currently interested in the executive track. However, the data show current staff are the most likely successors – whether they know it themselves or not. This paradox indicates that more work can be done in this area since there may be a subconscious holding back and difficulty imagining their successor at the helm. This may be a blind spot for EDs as leadership veers on being "heroic" versus shared. Another example is the observed hesitancy from EDs to take time off; the trust in their team they express is not fully realized since there is an underlying assumption that they should hold the responsibility and they alone can run the organization.

Appendix M: Voice Expanded

Table M.1

Voice & Predicted Executive Director Attrition

	Voice Rating				
Predicted ED Attrition in Next 2 Years	**Unclear**	**At Risk**	**Developing**	**Mixed**	**High**
Yes - potentially preventable				2	2
Yes - likely unpreventable*					3
No			1		7

Findings. Predominantly, voice was found to be high in the organizations surveyed, and it was discussed as the executives' comfort in expressing themselves and embracing the voices of others. The link between voice and attrition was weaker, though its importance in shared leadership was still apparent (see Table M.1), the examples of a past loss of voice indicate the connection between voice and preventable attrition exists. While referencing their emerging confidence, newer executives still almost uniformly shared their ability to express themselves freely. One such executive described finding their footing as a leader with former colleagues and now staff members, "I'm pretty open to hearing what other people have to say… But, it doesn't mean I'm gonna...do exactly what they want." The previous example of team heterogeneity where an ED expressed they did not have the lived experience of a single mom and the importance of honouring other perspectives was also shared by another ED, feeling that it is their duty as a leader to "listen to everybody's opinion and [value it]. Which can be really difficult."

One longtime solo ED shared how they have created a culture where challenging conversations are had, and they fostered voice within their team:

> We can always agree to disagree. But that's all the time. Like, and that's part of the reason why I like the [team structure], often I'll throw [an issue] out to the team. And…we have to vote…At the end of the day they know I'm responsible and if I veto, I can choose to do that, but I think I've only ever done that once.

It is important to note that "change-oriented communication" is a critical component of voice (Van Dyne & Lepine, 1998). One ED recounted being saved from near burnout and expressing this feeling to their board, telling them, "I need help. I need another body, and then they're like, great. And then they did it [they hired someone] …"

Voice – At Risk. The opposite effect can occur when desired change is not initiated after an executive candidly uses their voice to express their needs, challenges, or input on organizational direction. Several EDs reflected their frustration when this part of voice was

absent. One shared that "The board listens, but doesn't necessarily…take any sort of action." This same executive expressed their current burnout, and that they likely would not be in the role for more than a few years. A longtime executive shared that they considered leaving their role due to an issue that brought up the matter of voice. They reflected, "I felt undervalued because…my opinion didn't have the impact that it should have had. And my knowledge of the situation wasn't regarded as valuable as I thought it should have been."

Discussion. Predominantly, voice was found to be high in the organizations surveyed, and it was discussed as the executives' comfort in expressing themselves and embracing the voices of others. While it is a well-established construct of shared leadership (Wu et al., 2020, p. 53), the direct link between attrition and retention was more complicated to gauge. As it was uniformly high, interviewees did not provide a direct link to their desire to stay in the role. It did emerge strongly in the opposite fashion – that a loss of voice led to EDs' previous considerations to leave. This construct may be like mission motivation and trust - a predisposition of CSO leaders and leadership roles, which practically requires them to be the voice of a mission or organization.

Voice and Listening. The relationship of voice to listening or "being heard" was an important distinction. In some cases, genuine attempts to understand and listen were enough to satisfy the executive; in others, action was an essential component. Concerns about stressors and burnout seem more charged and fall into the "require action" category. ED isolation is likely to follow if no action occurs, as recounted in several interviews. A limitation is the difficulty gauging an organization's overall culture of voice. This study relied on self-reporting on how EDs used their voice and encouraged staff, volunteers, and clients, it was not triangulated by other interviewees in those categories.

Voice may come naturally to those in the ED position, as indicated by the uniformly high ratings across EDs of all experience levels. An unanticipated result was the high voice level in new EDs, even those who described their confidence as "developing." This may be impacted by the percentage of internal candidates who developed a rapport with stakeholders before adopting the role. Or, yet again, mission motivation could be moderating the construct, meaning that the dedication to serving clients overrides personal impediments to using one's voice. Considering these results and the high ratings in ED trust, it may be that EDs have a predisposition to engage in hard conversations. This encourages CSOs to take the next steps to facilitate a shared leadership culture by discussing topics like CSO retention strategies and succession planning.

Appendix N: Vision Expanded

Table N.1

Vision & Predicted Executive Director Attrition

	Vision Rating				
Predicted ED Attrition in Next 2 Years	**Unclear**	**At Risk**	**Developing**	**Mixed**	**High**
Yes - potentially preventable				1	4
Yes - likely unpreventable*				1	2
No			1		6

Findings. Vision emerged as a recurring theme in these conversations. Most executives had a clear one, ranking them "high" (see Table N.1). While vision is an extension of mission motivation, it is also distinct and worthy of independent exploration. EDs' visions for their organization and missions varied from transforming local community attitudes and strategies in addressing a complex social issue to wishing to continue the good work before their time. As it related to retention, the vision for their tenure impacted what they wanted out of their time as leaders for the organization and themselves. As an executive shared, "I think the thing that keeps you sort of hanging on sometimes is the whole idea that there's some things that I want to accomplish that I haven't yet." Another experienced leader said they wanted to leave their organization in a stable place for their successor but not linger after their best before date, "We see it in politics, sports teams, other things where leaders stay too long." Another ED described the stability they wanted to achieve and themself as the agency's caretaker, paying homage to preceding leadership; they shared that the agency "just gets better with each [ED] that comes in…So …my hopes are that I can develop on what's already been laid as a foundation, and just leave it in a place where it's a little bit better for the next person that's coming." As mentioned under the mission motivation section, for others, stepping into the role was about their wish to stabilize an agency they cared for, not motivated by their career development. Their vision included passing the torch as soon as they felt they could. A board member connected the integral nature of EDs and their vision, realizing the organizational mission; they reflected, "I don't believe we ever replace EDs…we intend to have another ED with another vision…" A longtime ED concurred, "when I left after [decades]… I didn't look back, [their] vision would be very different from mine…and it's not wrong."

Vision – At Risk. When an ED's vision is threatened, it poses a risk to their retention. The ED who shared how a board decision was not aligned with their vision described their inner conflict, "my concern…was that…if I wholeheartedly support this movement, how badly is it going to damage the organization?" Another experienced executive described how they have witnessed their colleagues' inability to achieve their vision and how a lack of resources can

erode, leaving them "disheartened." Another ED reflected on the dynamic of contract funding and losing support for essential programs, "I think a lot of people in executive director [roles] have really big hearts, and they can only take so much heartbreak."

Discussion. An unforeseen finding was the recurring relevance of the vision construct, which emerged through the data collection process. Mission motivation is related to vision but is the wider-held common "cause," and in this research context, vision is more singular. It is an executive's interpretation and personal stamp on the agency's realization of its mission. One ED clearly outlined its relevance to retention, "We all want to have goals we can set and achieve… [Leaders want to] create new things [they] can be proud of." As the head of an agency, the ED is responsible for realizing the organization's mission. Their interpretation of said mission translates into the impact felt across communities. EDs connected their predicted time in the role to whether their vision was attainable and tempted them to stay. This would suggest that agencies can best support EDs with thoughtful and regular strategic planning tethered to vision. Furthermore, creating realistic goals and celebrating wins is a way to enact POS throughout the process.

The visions EDs had for their organizations ranged from caretaking to ambitious expansion. Uniformly, though, a sense of responsibility and desire to protect this and see it through seemed to be a shared motivator. The various iterations of vision that came through invites further research on the links between vision type, shared leadership, retention, and tenure.

While this construct of vision is highly ranked across organizations, longtime EDs' reflection on difficult chapters of their tenures implies that evolution occurs in vision. It is unclear how many EDs entered the role with a predetermined vision and how that interacted with the standing mission and strategic plan. This calls for further research. What is clear was the association between an unachievable or conflicting (with board, staff, funders, etc.) vision, leading EDs to consider leaving their role.

While nearly all board members interviewed referenced the importance of a good strategic plan, this study did not delve into its alignment or influence on an ED's vision and whether the executive's vision was adopted or not. It is a risk to ED attention when alignment between funders, the board, a strategic plan, or resources conflicts with an ED's vision. Mission motivation can likely moderate this, providing stability when achieving one's vision may be elusive.

Appendix O: Other Topics Expanded

Housing. The challenge of ED housing came up organically in just over half of the interviews. As a board member reflected on past ED recruitment, "We had two really great candidates brought into the community, right? Both of those candidates, housing was absolutely impossible. They wanted … to be able to buy appropriate housing. Neither one could." Another board member advised, being proactive on this issue, "Whether [executives] want to rent or whether they want to buy, [ensure] there's assistance given…Because if you don't…[they're] not gonna come." This creates an additional barrier to recruiting candidates not already local to the agency's community. Therefore, an agency's ability to support bridging this gap is essential to recruitment efforts.

Succession Planning in the Literature. For a more fulsome conversation surrounding the antecedents of executive retention, one must go full circle. Therefore, exploring organizational trends surrounding succession planning is helpful to understand the contexts in which executives enter and exit the role. Rothwell (2001) defines succession planning as "a deliberate and systematic effort by an organization to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement." (2001, p. 6). Succession planning is divided into emergency and departure-based, categorized by their level of expectedness from the organization (Geib & Boenigk, 2022, p. 63). Much of the literature surrounding succession planning is prescriptive and borne from corporate contexts (Mckee & Froelich, 2016, p. 588).

The paradox of succession planning being viewed as highly important, yet nonprofits insufficiently investing in it, is very well documented (Allison, 2002, p. 341; Froelich et al., 2011, p. 15; Gothard & Austin, 2013, p. 273; McKee & Froelich, 2016, pp. 587-8). The potential benefits of successful succession planning are significant, as are the risks when it goes awry. Li (2019) outlines the spectrum of results ranging from high performance to organizational demise, citing numerous sources (Balser & Carmin, 2009; Carroll, 1984; Haveman & Khaire, 2004; Hernandez & Leslie, 2001, pp. 341-2). CompassPoint, a US-based consultant, also studied 28 nonprofits and identified threats to the succession process in themes such as boards underestimating the risk and cost of 'bad hires,' being unprepared for the task, and failing to capitalize on the opportunities that arise during the transition (p. 341). While attitudes may be shifting, as seen in the "Under Pressure: 2024 State of BC's Nonprofit Sector" report (p. 75), the older CompassPoint (2001) study observed a uniform desire by organizations to "spend as little money as possible" to secure their next executive (p. 341).

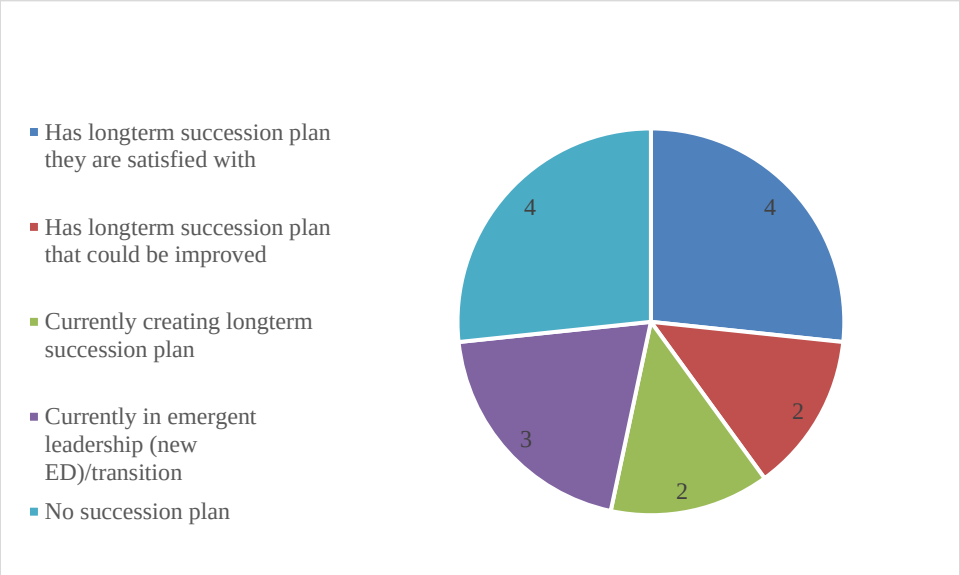
Gothard & Austin (2013) provide a framework for succession planning in various contexts ("emergency-based" and "departure-based") and another for developing and retaining leaders for human service nonprofits (pp. 277–279). The authors underscore the importance of aligning the mission with the leadership development strategy, maintaining work-life balance,

providing professional development opportunities, and conducting evaluations, all underpinned by ongoing clear communication (p. 279). While functional and heavily cited (see Bozer et al., 2015; McKee & Froelich, 2016; Geib & Boenigk, 2022; Santora & Sarros, 2015), this theoretical framework is confined to developing only internal candidates within CSOs (Gothard & Austin, p. 280).

Succession Planning and Retention Strategies Findings. Consistent with the literature (Geib & Boenigk, 2022; Tierney, 2006), interviewees almost uniformly stated the importance of succession planning, with a wide variety of actions taken in this area (see Figure 0.1). One interviewee shared, "The board always has to bear in mind that it…could happen quickly. So you need to have in place the policies for recruitment." Contrasting this, another board member said, "In truth, the best [laid] plans in the world will not assist you," citing an example where the ED tragically passed away. Agencies had a higher number of emergency plans (versus long-term succession planning) in place if an executive could not perform duties. Some referenced emergency succession plans had already been enacted or formed partly due to circumstances like an ED-planned vacation or health event. A number had created plans as a requirement to secure their agency's accreditation.

Figure O.1

Long-Term Succession Planning – by CSO



Discussion. As former President Eisenhower said, "I heard long ago in the Army: Plans are worthless, but planning is everything" (*Quotes | Eisenhower Presidential Library*, n.d.) This quote sums up the takeaways on succession planning findings. While the push and pull between more urgent matters and long-term stability was a commonly reported challenge by interviewees, something is better than nothing; engaging in these conversations serves a great purpose, even if the specifics of succession are not nailed down. CSO boards should tie this work into a

formalized ED retention strategy for high-performing executives. It is also a natural complement to retention conversations, as it invites executives to share their desired trajectory and demonstrate intention to protect the organization's future. Unsurprisingly, Geib & Boenigk's (2022) retention strategy has not made its way from American academia into mainstream Canadian social services practice.

Internal and External Candidates in the Literature. A natural extension of the succession planning conversation is an examination of the successor pool. The literature documents organizational preference for internal candidates (McKee & Froelich, 2016, p. 593). This phenomenon is also observed locally in British Columbia and more rural and remote communities (SSLMRFP, 2020, p. 52). Other specific contexts have noted this phenomenon as well. In a study of nonprofit executives and succession themes, Santora et al. (2018) found that in a post-socialist Estonia, the distrust of outsiders highly favored internal candidates (p. 6). Another reason for internal preference was related to the mission connection, as boards aim to "[protect] organizational values" in addition to a wariness of transferability from candidates from other sectors (p. 7). A challenging dynamic emerges here; despite this preference for internal candidates, nonprofits tend to report a tiny pool of internal successor candidates (Froelich et al., 2011, p. 15). Smaller nonprofits are particularly challenged by this as "systemic career paths" are difficult to create in these organizations, as Ban et al. (2003) small-scale exploratory study documented (p. 148 and in Froelich et al., 2011, p 8; Johnson, 2009, p. 295). Tierney (2006) also observed this and noted that only 30-40% of senior nonprofit management hires were internal, whereas about half of their business counterparts were (p. 16). While preferences are clear, whether an internal or external candidate performs better depends—it is highly contextual, as Gothard and Austin (2013) outlined in a nonprofit succession planning analysis (p. 275).

Internal and External Candidates Findings. As previously stated, most executives surveyed were promoted from within the organization. And despite this, many internal hires also shared that they did not receive sufficient onboarding and training for the role. Current longtime executives reported that they had thought a bit about preparing a successor but by no means expressed feeling secure in their work to date, securing their agency's future. Their reasons ranged from planning to mentor closer to their departure date, their agency's promising candidates had shown little interest in a leadership role, no obvious candidate existed, and the ED's bandwidth was already stretched thin. When asked to share advice on the matter, one ED said,

> I would encourage more organizations to consider how they would groom internal talent… So that when opportunities arise, there is potential for an internal person, because I do think that there are a lot of benefits, especially when we were talking about like motivation and purpose and how … I'm already in the community. I'm already invested here. I'm not having to be…drawn here.

While current EDs were largely internal candidates, several were not. External EDs face additional stressors like potentially being seen as community outsiders and needing to adjust to their geographical and cultural context. Other external EDs faced long commutes in challenging conditions that impacted the sustainability of the role. One interviewee discussed the pattern of recurring turnover in the ED role at their agency, pointing to external hires who relocated for the role,

> I guess if there's a pattern, it's probably bringing people in… from other places that don't know our community…and then… it seems like all of them haven't loved the community. Probably because it's really small and hard to like fit into and they're relocating.

The dynamic that came up the most was the challenge of establishing trust between a new executive and their staff where an ED was hired externally (see also section 4.8 Trust).

Discussion. Furthermore, interviewees also commonly expressed a shortage of applicants as a factor in recruitment and with ED's mission motivation and trust being so important to board members, internal candidates have a head start in demonstrating these qualities. While a fulsome exploration of internal versus external candidates for ED roles is beyond this project's scope, it is worth noting that particular attention to creating trust for external hires may be needed. If not successful, it may create a retention threat. Without trust, an ED may be unable to establish a culture with a strong voice or harness the potential of team heterogeneity.

Appendix P: Shared Leadership Construct Rating, Leadership Structure & Predicted Preventable Attrition Summary

CSO Pseudonym	Leadership Structure (Co-leadership, Solo ED)	Potentially Preventable Attrition in Next 2 Years?	Shared Leadership Culture Rating	Trust	POS	Team Heterogeneity	Voice	Mission Motivation	Vision
			Construct Rating						
A	Solo ED	No	Mixed	High	Mixed	High	High	High	High
B	Solo ED	No	High	High	High	Developing	High	High	High
C	Solo ED	No	High	High	High	High	High	High	High
D	Co-leadership	No	High	High	High	High	High	High	High
E	Solo ED	No	High	High	High	High	High	High	Mixed
F	Solo ED	Yes	Developing	Developing	At Risk	Developing	Mixed	High	High
G	Co-leadership	No	High	High	High	High	High	High	High
H	Solo ED	No	High	Mixed	Mixed	High	Mixed	High	High
I	Solo ED	No	Mixed	High	Mixed	High	High	High	High
J	Solo ED	No	Mixed	High	High	Developing	High	High	High
K	Solo ED	No (unpreventable)	High	High	High	Unclear	High	High	High
L	Solo ED	Yes	At Risk	Mixed	At Risk	Developing	High	High	High
M	Solo ED	Yes	At Risk	At Risk	At Risk	High	High	High	High
N	Solo ED	No	High	High	High	Unclear	High	High	Mixed
O	Solo ED	No	High	High	Mixed	High	Developing	High	Developing