Methodology & Interviewees

**Purpose:** In 2021 during the APEN leadership transition, this research helped determine the next leadership model of APEN: sole Executive Director or Co-Directorship.

**Methodology:** Conduct 1-1 interviews with Co-Directors and sole EDs, analyze for themes.

**Co-Directors Interviewed**
- California Environmental Justice Alliance, Strela Cervas, former Co-Director
- Chinese for Affirmative Action, Vincent Pan, Co-Director
- Council of Community Housing Organizations, Fernando Martí, Co-Director
- Climate Justice Alliance, Marion Gee, Incoming Co-Director (three Co-Directors)
- Freedom, Inc., Kabzuag Vaj, Co-Executive Director
- Food Chain Workers Alliance, Joann Lo, former Co-Director
- Human Impact Partners, Solange Gould, Co-Director
- Leadership Counsel for Justice and Accountability, Veronica Garibay and Phoebe Seaton, Co-Directors

**Sole Executive Directors / President & CEOs Interviewed**
- Central Coast Alliance United for a Sustainable Economy, Maricela Morales, Executive Director
- Communities for a Better Environment, Darryl Molina Sarmiento, Executive Director
- Greenlining Institute, Debra Gore-Mann, President & CEO
Values & Organizational Culture

Top 3 Core Values Named Across All Organizations:
- Racial justice and anti-racism
- Feminism and gender equity
- Climate Justice

Top 3 Ways Interviewees Describe their Organizational Culture
- Working in coalition
- Sustainability and wellness
- Share leadership / shared power
Benefits & Reasons for Co-Director Model

- **Shared leadership and valuing leadership**: Organizations that choose a Co-Director model feel that their core values of shared leadership and democratic decision-making are better reflected in a Co-Director model.

- **Complementary skill sets**: Organizations with a Co-Director model report an unfairness in the expectation that a single person should be knowledgeable in all the skill sets that are required of leadership.

- **Sustainability**: Organizations that transitioned from a sole ED model to a Co-Director model report that their role as a sole ED can be extremely unsustainable. They believe that a Co-Director model relieves some of the burden.

- **Challenge to white dominant culture and capitalism**: Several organizations want to disrupt the dominant system of one charismatic leader.

- **Productivity**: Co-Directors that transitioned from a sole ED model report a bottleneck in tasks. They believe that Co-Directors are able to accomplish more.

- **Identity**: Leadership should reflect those you serve and organize. Co-Directors with varying identities achieve that.
What Makes Co-Directors Successful Together?

1. Shared vision and values
2. Respect and working well with each other
3. Communication and Transparency
4. Having support from consultant(s)
5. Identifying and supporting each other’s strengths and growth areas
6. Investment in skills building
7. Trust
8. Clear decision-making process
9. Understanding of when to step in or step back
10. Wellness and sustainability practices
11. Humility and letting go of ego
12. Create a united front and avoid gossip
13. Co-Directors should identify with- and share the lived experience of those you serve

Mixed results:
1. Coaching: Some organizations report success with coaching, others report a bad experience with coaching
2. Redundancy: Some organizations find redundancy in Co-Director roles helpful, while others avoid redundancy
Benefits & Reasons for Sole ED/CEO Model

- **People-centered approach**: One major determinant of hiring the next leader of an organization is the people. Two sole ED/CEO organizations interviewed hired from within their organization citing the importance of succession plans and professional development of their own leaders.

- **Clear accountability**: The organization is clear that the ED/CEO is largely responsible for oversight, fundraising, hiring and firing, and board coordination.

- **Clarity of supervision and coordination with the next “tier” of staff**: The Deputy Director and/or director-level staff are clear that they have one supervisor and can directly coordinate and communicate with the ED/CEO.

- **Main contact for the organization**: In most cases and especially for high profile situations, the general public is clear who is the main contact and spokesperson for the organization. Funders and policy-makers also appreciate one main contact for an organization.

- **Ability to also have shared leadership**: Organizations with a sole ED/CEO model say they do, in fact, have shared leadership and that decision-making can be distributed. For example, one organization uses a “transformative organizing model” where decisions are distributed across the organization.
What Makes a Sole ED/CEO Successful?

- **Succession planning and leadership pipeline**: In one case, the organization set an organizational culture of developing the Associate Director to become the ED.

- **Strong director-level staff**: The most tenured directors came from the community. There is a longevity and institutional knowledge of staff.

- **Family-supporting practices and structure**: Two of the EDs had children when they became new EDS. Other director level leaders are able to step in.

- **Coaching**: Values-aligned coaching where ED can be vulnerable

- **Consultants**: Trusted external senior-level consultants that can take on work when capacity goes down.

- **Experienced and active board of directors**: One organization said they have two board Co-Chairs that are diverse and actively support the CEO in strategy and decision-making.
Challenges & Pitfalls

CO-DIRECTORS

- Lack of alignment on vision, values, and/or politics
- Lack of communication
- Roles and responsibilities not feeling fair/equitable
- Staff deferring to Co-Directors on all decisions
- Potential to side with and form alliances with one Co-Director

SOLE EDS

- Sustainability - Lack capacity to do it all
- Expectation that ED needs to be an expert at everything: fundraising, HR, programs, operations
- Easily get scrutinized: As main decision-maker and face of organization
- Potential to be less collaborative because it's easier to make a decision and move

ACROSS THE BOARD

- Decision-making: Organizations that centers values of collaboration and inclusivity have a harder time with decision-making
- Capacity: Even with any type of organizational restructuring many report that the overall job is still unsustainable.
- Bias against female executive leadership
Co-Director Roles & Responsibilities

There is no one formula for how co-directors approach their roles and responsibilities. Some organizations believe in sharing all of the major responsibilities equally, while others have a “lead”. There is no one way for determining who will be the lead. In general, organizations report divvying up the responsibilities according to:

- **Skill set/expertise**: Many Co-EDs divided roles according to skill set, while some chose not to divide according to skill set.
- **Interest**: Several Co-EDs divided roles according to their level of interest and/or if they wanted to learn and grow in that area.
- **Relationships**: Co-EDs reported having existing relationships in any given area of work and, therefore, became the automatic point person in that area.
- **Capacity available**: The lead on any area of work/program depended on who has the capacity to take it on.
- **Identity**: Some Co-EDs divvy up work according to identity (race, gender, sexuality, etc). E.g. Southeast Asian Co-ED leads “Stop Asian Hate” campaign, while Black Co-ED leads work on Black Girls Matter.
Co-Director Roles & Responsibilities

"How are roles and responsibilities divided?"

<<Examples>>
<table>
<thead>
<tr>
<th>Organization</th>
<th>Fund Development</th>
<th>Programs</th>
<th>Oversight / Org Development / Operations / Budget</th>
<th>Internal Management / Supervision</th>
<th>HR / Conflict resolution</th>
<th>Work with Board</th>
<th>Public Face</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>California Environmental Justice Alliance</strong></td>
<td>One lead</td>
<td>Each program assigned a lead Co-ED</td>
<td>One lead</td>
<td>Shared. Each Co-ED supervised equal # of staff</td>
<td>Shared + Work with Steering Committee or consultant</td>
<td>Shared</td>
<td>Shared generally. Program lead is spokesperson for that program.</td>
</tr>
<tr>
<td><em>former Co-Director model in 2017</em></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Some shared responsibilities with mostly a “lead”. Determined who will be lead depending on skill set, interest, and capacity.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Chinese for Affirmative Action</strong></td>
<td></td>
<td>New funders: Shared. Current funders: Divided according to initiative.</td>
<td>Shared</td>
<td>Shared. Each Co-ED supervised equal # of staff</td>
<td>HR Dept leads</td>
<td>Shared</td>
<td>Shared</td>
</tr>
<tr>
<td>Avoided having an internal vs external Co-ED. Shared major areas of work. Divided work depending on their initiatives, relationships, and capacity. Did not divide according to skill set.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Climate Justice Alliance</strong></td>
<td></td>
<td>One lead (funder &amp; operations). Members meet w/ funders.</td>
<td>One lead in: -Funder &amp; Ops &amp; Reinvest Campaign -Organizing -Comms &amp; Policy</td>
<td>One lead (funder &amp; operations)</td>
<td>Shared. Each Co-ED supervises the Director of the Programs they support.</td>
<td>HR Dept // Co-EDs</td>
<td>One lead</td>
</tr>
<tr>
<td>In 2021, CJA was hiring for three Co-Directors. The following is the projected division of roles.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Council of Community Housing Organizations</strong></td>
<td></td>
<td>Shared</td>
<td>Shared</td>
<td>Shared (small staff)</td>
<td>One lead</td>
<td>Shared</td>
<td>Shared</td>
</tr>
<tr>
<td>CCHO is a small organization that only had the two Co-Directors until six years ago. Currently, only have four staff.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>Fund Development</td>
<td>Programs</td>
<td>Oversight / Org Development / Operations / Budget</td>
<td>Internal Management / Supervision</td>
<td>HR / Conflict resolution</td>
<td>Work with Board</td>
<td>Public Face</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>------------------------------------------</td>
<td>---------------------------------------------------</td>
<td>--------------------------------------------------</td>
<td>-----------------------------------</td>
<td>--------------------------</td>
<td>------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Food Chain Workers Alliance</td>
<td>One lead, but both maintained funder relationships</td>
<td>One lead for each program/campaign</td>
<td>One lead</td>
<td>Shared</td>
<td>Shared</td>
<td>One lead</td>
<td>Split according to availability</td>
</tr>
<tr>
<td>Freedom, Inc.</td>
<td>Shared. One lead on grants. One lead on individual donors</td>
<td>Split depending on identity and expertise</td>
<td>Shared</td>
<td>Shared using same written processes. Use transformative justice (hire/fire in teams)</td>
<td>Shared</td>
<td>Shared, switch off facilitation</td>
<td>Depends on politics and strategy</td>
</tr>
<tr>
<td>Human Impact Partners</td>
<td>Split fundraising development, grant writing, and grant management. Decisions on how to split can be based on relationships, or content expertise.</td>
<td>Split according to expertise and interest.</td>
<td>Shared</td>
<td>Shared. Each Co-ED supervise approximately equal # of staff</td>
<td>Shared with Operations Director and Leadership Team (shared power)</td>
<td>Shared</td>
<td>Shared</td>
</tr>
<tr>
<td>Leadership Counsel for Justice &amp; Accountability</td>
<td>New funders: Shared. Current funders: Split according to expertise and desire to learn</td>
<td>Shared</td>
<td>Shared. Co-EDs supervise senior management and directors only</td>
<td>Shared.</td>
<td>Shared, switch off facilitation</td>
<td>Shared with other staff. One lead depending on geography</td>
<td></td>
</tr>
</tbody>
</table>
Sole ED/CEO Roles & Responsibilities

<<Examples>>
## Communities for a Better Environment (CBE)

<table>
<thead>
<tr>
<th>Executive Director/President &amp; CEO</th>
<th>Responsibilities delegated to other staff</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outreach and Advocacy:</strong> public speaking opportunities, engages with decision-makers at local, regional and state levels, builds relationships with partners in alliances and coalitions, writes op-eds, press releases and blogs to raise profile of the organization’s work</td>
<td><strong>Fund development:</strong> ED interfaces with all funders, but other staff cultivate funder relationships based on area of expertise, geography. Have 4-person Development Team.</td>
</tr>
<tr>
<td><strong>Program:</strong> Implements the current strategic plan; Ensures the development of annual program plans and evaluations</td>
<td><strong>Strategic Partnerships:</strong> ED only interfaces with high level partners and those that CBE helped to found. Other partners are handled by staff.</td>
</tr>
<tr>
<td><strong>Human Resources:</strong> Ensures staff evaluations are completed; Hires, manages, and develops staff; Fosters leadership development among staff, board, and community members</td>
<td><strong>Policy:</strong> Policy Team is connected to decision-makers. ED attends all policy meetings, but model is not for ED to be spokesperson.</td>
</tr>
<tr>
<td><strong>Development:</strong> Contributes to the development of annual fundraising plans; Develops and implements a fundraising strategy; Cultivates and stewards relationships</td>
<td><strong>501c4:</strong> Civic Engagement Coordinator is lead staff of c4 (while ED is support) and attends each Team’s meeting, and manages ally relationships. ED raises c4 funds and attends high level meetings.</td>
</tr>
<tr>
<td><strong>Supervision:</strong> Supervise all directors, resiliency coordinator, co-supervise Civic Engagement Coordinator</td>
<td></td>
</tr>
</tbody>
</table>
## Executive Director/President & CEO

### Roles & Responsibilities

The crux of the job is **movement building while navigating BOTH centering BIPOC in a capitalist system AND dismantling that very system.**

“There’s a unique positionality with EJ/social justice organizations and an inherent conflict. You are trying to dismantle broken systems. And then the leadership wants to not demonstrate those bad structures. We are constantly trying to have progressive orgs that center POC, gender, sexuality in these structures. Then have staff fight an oppressive system."

**Manage resources:** 1) People and 2) Financial - raise funds, do the external funder relationship-building

### Additional named responsibilities:

- HR and internal management
- Strategic planning

## Greenlining Uses Values and Principles in Leadership Model

Greenlining is grounded in the following values and principles that guide their work:

- Non-exploitive
- Cooperative
- Inclusive
- Regenerative
- Democratic

Greenlining uses the above values and principles in their leadership model and decision-making (see [Organizational Model](#) section). The inclusive, cooperative, and democratic values show up in their leadership model in the following ways:

- **Board Co-Chairs** actively support the President & CEO
- **Collaborative leadership** with the following four teams:
  - Development Team
  - Policy Team
  - Talent Team
  - Operations/Finance Team
- **Workforce Equity & Inclusion Committee** that is predominantly made of staff, and inclusive of the President and Board Chairs. This Committee is a safe space where staff can offer opinions on major decisions without retaliation.
Leadership Models

“How are decisions made?”

<<Examples>>
"We have no problems making decisions." - Vincent Pan
FREEDOM, INC. (30 STAFF)
<< EXECUTIVE TEAM >>

3-person Executive Team = High level decisions

- Co-Director
- Co-Director

Executive Accountant

1 Director of Grants & Development
1 Admin Director
2 Community Power Building Directors
2 Youth Justice Directors
3 Gender Justice Directors

Staffing, programming, direction of organization =
Goes to staff first >
Final decision goes to Co-Directors

501c4: Completely separate staff and infrastructure

Managers
Full-time staff
Part-time staff
LEADERSHIP COUNSEL FOR JUSTICE & ACCOUNTABILITY (29 STAFF)
<< SENIOR MANAGEMENT >>

Leadership Team is composed of:
- Co-Directors
- Senior Management
- Mid-Management

Senior Management
- Regional Policy Managers
- Development Director
- Director of Operations
- Directing Attorneys

Mid-Management
- Office Manager
- Community Engagement Specialist
- Communications Manager
- Policy Advocates
- Policy Coordinators
- Civic Engagement Specialist

501c4: Fiscally sponsored. Civic Engagement Specialist is lead.
COMMUNITIES FOR A BETTER ENVIRONMENT (29 STAFF)
<< TRANSFORMATIVE ORGANIZING MODEL >>

Admin Team:
- Practices collective decision-making
- Conducts lead thinking and research for administrative, financial and development related decisions so that each Team makes well-informed decisions

Members and community

501c4: Civic Engagement Coordinator is lead

Decisions happen at "Team" level.
GREENLINING INSTITUTE (24 STAFF)

<< VICE PRESIDENTS >>

- Economic Equity
  - Housing / Small Biz / CRA / Tech / Supplier Diversity

- Transformative Communities
  - Coalition / Capacity Building / TA / Soc. Determinants

- Climate Equity
  - Climate / Transportation / Decarb / PUC

- HR
  - Strategic Alignment
  - Workplace Culture
  - Workforce Planning
  - Recruitment & Retention
  - Performance Acceleration

- Academy and Talent Development
  - CASA, Fellow & Summer Leadership Programs

- VP Policy

- VP Development and Comms

- VP Operations & Finance

- Development
  - Grants & Contracts / Foundations / Annual Giving

- Communications
  - Media Relations
  - Digital Strategy

- Events & Donor Engagements
  - Sponsorships
  - Memberships

- Finance
  - Budget Administration / Financial Strategy
  - Audit & Compliance / AP/AR

- Operations
  - Office Management
  - Property Management
  - Facilities / IT