

The 120-Day Plan

How Susan Dreyfus transitioned into her role as CEO of Families International

Stepping into a new leadership role is a big challenge even under ideal circumstances. But it can be a particularly formidable task to come into an organization whose employees and members are grieving the loss of their longtime leader.

Such was the case for Susan Dreyfus, who became president and CEO of Families International in January 2012, replacing long-time, visionary leader Peter Goldberg, who had died unexpectedly in August 2011.

Goldberg had led the Alliance for Children and Families and Families International, a nonprofit parent organization of the Alliance, Ways to Work, United Neighborhood Centers of America, and the social enterprise, FEI Behavioral Health, for 17 years.¹ Dreyfus knew that in her first few months on the job she needed to give staff, members, volunteers, funders, and other partners time to grieve and connect with her, even as she needed to engage fully in her new role and move the organization forward. To that end, she created a 120-Day transition plan. The plan was based on a clear statement of goals that she believed her transition schedule would need to focus on. It was a simple, two-page document articulating her aspirations and goals for herself and the organization during that period. She shared the document with the staff and boards of directors of each of the Families International organizations. Her goal was to come through the first 120 days with an emerging vision that would guide planning and priorities for the future.

“The realities of the times for America’s nonprofits required me to be able to hit the ground running. But I also needed to take a few months both internally and externally to connect with staff and understand the organizations. I also had to connect with members, funding partners, board members, media and my own personal and professional network across the country. It was a time for me to listen, learn, create new relationships, and develop an emerging vision for driving us forward during an unprecedented time of great change, risk, and opportunity for our sector,” Dreyfus said.

¹ Families International is the parent organization of three nonprofits—the Alliance for Children and Families, United Neighborhood Centers of America (UNCA), Ways to Work—and a for-profit enterprise, FEI Behavioral Health. With her move, Dreyfus also became president and CEO of the Alliance for Children and Families, CEO of Ways to Work, CEO of UNCA, and a board member at FEI Behavioral Health.

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In an April 2012 interview with Bridgespan Partner Kathleen Yazbak and Senior Editor Carole Matthews, as her first 120 days on the job were drawing to a close, Dreyfus reflected on the plan, noting that it had served its purpose well. In fact, she said, creating a 120-day plan would probably be a useful exercise for other people stepping into new nonprofit leadership roles, regardless of the circumstances surrounding their appointments.

Yazbak, who specializes in leadership search for nonprofit organizations, agreed. “Most senior management teams and boards in the nonprofit world recognize the need for succession work and thoughtful ‘on-boarding’ when a new leader steps in,” she said. “But there is often a ‘disconnect’ between *knowing* that this work is important, and being able to meet what is really a very difficult challenge. Each transition process is unique, and the needs of one nonprofit can differ greatly from the needs of another. Susan’s 120-day-plan offers a distinctive angle on the essentials of a smooth transition.” (For further reading on leadership transitions, please see [“Get Ready for Your Next Assignment”](#) and [“On-boarding: Tips for Transitioning into a Senior Nonprofit Role.”](#))

A simple, two-page document

Dreyfus’s 120-day plan had three sections: Context Setting/Framework; Goals of the Transition Process; and Guiding Principles in the Development and Implementation of the Plan.

The first section—just six paragraphs long—called for the leadership team to think of those 120 days as an opportunity to communicate collectively and strategically about Families International, the organizations under its umbrella, and their value as an interconnected group of companies driving a single vision of a healthy society and strong communities for all children, families, and adults.

It also explicitly recognized Dreyfus’s unique connection and history with the organization. In some ways, she was “coming home again.” She had, in fact, served as senior vice president and chief operating officer at Families International and the Alliance from 2003 to 2007, before joining Rogers Behavioral Health System as executive vice president for strategy. In May 2009, she was appointed by Governor Christine Gregoire as secretary of the Washington State Department of Social and Health Services.

But, as she pointed out, it was important that the plan acknowledge the advantages and potential challenges associated with her history. The clear advantage was that she had known Peter Goldberg very well, understood the choices he had made as a leader, and had tremendous respect for his work. “He mentored me, and he was a personal friend,” she said. A potential challenge was that the organization’s members, leaders, staff, and supporters might expect Dreyfus to step in and essentially “keep on keeping on.”

Explained Dreyfus, “Two things I know for sure, Peter wants me to move this organization forward, and change is a constant.” “I think the plan we put in place reflects that I wanted to listen, learn, and understand how the organization had transitioned and changed since I had left in 2007,” Dreyfus said. “Yet, as the plan also spells out through listing the unique stakeholders I am able to access through my previous job, I wanted people to see and understand how I, too, had changed.

“Overall, I realized that this transition has to reflect my beliefs that our sector must be focused on ways that we, through our work, partnerships, innovation, and advocacy, can view ourselves, *and* be viewed, as being highly relevant to the larger impact of reducing the number of people

living in poverty, increasing the number of people living safe and healthy lives, and helping more people be on pathways for educational and employment success," she said. "A transition plan is just one small piece in conveying this message, but it was actually a perfect way to begin to implement it."

Goals of the Transition Process, the second section, articulated six steps that Dreyfus and the organization would take within the 120 days. These included having Dreyfus connect with numerous current and potential network members of the Alliance for Children and Families and United Neighborhood Centers of America. This engagement included three "virtual coffee" teleconferences for members, videos with personal messages from Dreyfus placed on the Alliance website, media interviews, a weekly blog post, and daily "tweets" on Twitter. Her extensive travel schedule included speeches to member and national audiences, and meetings with foundation partners, federal officials, and many of her state government colleagues.

The third section established guide rails to help the staff stay focused. For example, the one point was a reminder that "transition activities will focus on strategically raising the profile of Families International and all affiliated organizations among the audiences and constituencies most important to each." Another called for transition activities to be organized so that "member recruitment and retention opportunities are maximized around Susan's travel, unique contacts, and knowledge of the sector."

The Constituency Chart dealt with logistics. Minimalist, but critical, it outlined a timetable for the tasks that Dreyfus and the other members of the organizations' leadership team would need to accomplish in order for the 120-day plan to be successful. It also assigned tasks. The chart's headings, listed horizontally, read: Constituency, How, When, Who, and Success Metrics. Vertically, the chart captured the essential goals of the plan.

In one segment, for example, the constituency was all staff members, and the assignment called for establishing regular opportunities, Dreyfus calls "Forward Forums," for all staff to gather with Dreyfus to learn about the important forces and challenges facing nonprofit human service organizations. (One such forum included a discussion with Bridgespan's Daniel Stid on the report ["The View from the Cliff: Government-Funding Nonprofits Are Looking Out on Steep Cuts and an Uncertain Future."](#)) As she explained, the forums are designed to engage employees in learning and discussing opportunities so they too feel as connected to and passionate about the organization's vision.

"I want my employees to be as passionate for what we need to achieve as for what we do. We are more than an organization, we are a cause, and after our membership, my great employees are key to our success," Dreyfus explained.

Ultimately, Dreyfus said, the 120-day plan has helped set the organization on the path toward what she hopes is a greater impact. As she put it, "When you're a new executive, and you're coming in on the heels of something traumatic, I think people are looking for answers and want continuity. They would have loved nothing more than for me to tell them, 'This is what I want you to do.' But I was not going to do that," she said. "The plan has helped us create an emerging vision and direction, but how we will accomplish it is a shared responsibility that will continue to evolve. I ask my employees daily, 'Will you join me in leadership, and through your daily work propel the resource engine of high performing impactful nonprofit health and human service organizations across America?'"

Dreyfus and her executive leadership team from the Families International organizations have now taken the emerging vision and priorities she laid out after her first 120 days and are developing a balanced scorecard for this interconnected group of companies. The scorecard will serve as the focal point of discussion at a Families International Board Chair retreat this summer. Dreyfus reminded everyone that Peter always said, “The world is changing quickly, and we must be positioned for a future that is going to be very different from the past.”

Framing a 120-Day Plan

Interested in creating your own 120-Day Plan? Keep it short and straightforward, and consider using a three-part structure, as Susan Dreyfus, president and CEO of the Alliance for Children and Families, did.

Part 1: Context Setting/Framework:

The first section should talk about the organization as a whole, and at a high level. Where is it now? What are its strengths? Which areas should be explored first to better understand its unique needs and challenges? This section can introduce, in broad terms, the particular areas of expertise you are bringing to the table and why they are relevant. It should serve as a call for collective communication; a request to senior managers and advisors that the next 120-days be viewed as an opportunity to forge a new alliance and get clear on big-picture priorities.

Part 2: Goals of the Transition Process

Here you can get more specific, articulating several steps that you intend for the organization to take within the next 120 days. These can include your own actions as well as any organizational process changes you feel need to be accomplished in reasonably short order.

Part 3: Guiding Principles in Development and Implementation of the Plan

The third and final section can serve as a reminder of the values that the organization needs to keep in mind as leaders and staff members engage in the 120-day plan. It should establish guiderails to help people stay focused on the goals of the plan.

For Families International and its interconnected organizations, these included strategically raising the profile of the organizations among the audiences and constituencies most important to each. In addition, Dreyfus asserted that transition activities should be organized so that member recruitment and retention opportunities for the Alliance and United Neighborhood Centers of America were maximized, taking into account her travel, unique contacts, and knowledge of the sector.

In addition to her 120-day plan, Dreyfus created a Constituency Chart, which you may also find useful. A Constituency Chart deals with logistics; essentially, it maps out who will do what, sets a timetable for the activities you're proposing, and outlines measures of success.