

What Is a Chief of Staff and When Do You Need One?

By Madeleine Niebauer

For-profit and nonprofit leaders alike are finding the value of adding a chief of staff to their leadership teams. This senior position acts as a strategic thought partner to leaders and frees up their time to focus on where they can have the most impact.

Below, we explore the role more deeply to help you determine if adding a chief of staff makes sense for your leadership team.

What does a chief of staff do?

The short answer is, it depends. By design, the chief of staff role varies from one organization to another, but the best chiefs of staff will complement the skills of their leaders. For example, visionary leaders will need chiefs of staff with strategic focus and operational efficiency to ensure they make the most of a limited and valuable resource: their time.

Primarily, chiefs of staff act as leaders' right hands and trusted advisers. They work directly with CEOs and build strong relationships with team members across the organization in order to influence outcomes and maintain momentum. Chiefs of staff often have a bird's-eye view across teams and departments, allowing them to connect the dots in ways that others can't.

As Tyler Parris notes in his book, *Chief of Staff: The Strategic Partner Who Will Revolutionize Your Organization*: "To help [a leader] make and execute great decisions, the chief of staff serves as analyst and decision-framer on one hand and project manager, change agent, and coach on the other."

A Day in the Life of a Nonprofit Chief of Staff

“I organize and align strategic priorities with members of the senior leadership team, making sure the right people are talking about the right things at the right time and ensuring that our young adults stay at the center of all our planning and decision making. My goal is to see around corners so that our president and CEO can always say, ‘Yes, I was just talking about that yesterday. Let me share what we discussed for your input,’ to a board member or funder. I also shape our internal leadership communications, so that our staff are informed and inspired and see how their day-to-day work connects to our mission and the Opportunity Movement.”

— Alison Washabaugh, Chief of Staff, Year Up

Though there is no specific set of tasks that chiefs of staff always leads, here are some examples of projects they may oversee:

Direct Support of the CEO

- Work with leaders to set strategic priorities: Chiefs of staff help identify areas where leaders should direct their focus as well as metrics for success. They revisit those metrics regularly and evaluate progress against them.
- Strategically manage leaders’ time: Working with executive assistants, chiefs of staff look at leaders’ external opportunities, including long-term travel and meeting plans, and assess their fit against priorities.
- Act as gatekeepers: Chiefs of staff ensure the CEOs’ involvement in project or decision-making processes takes place at key times, where their input and authority are most needed.
- Prepare for and follow up on meetings: Chiefs of staff prepare leaders for upcoming meetings by ensuring they have all the information necessary to be productive and engaged.
- Manage internal and external communications: As partners to CEOs, chiefs of staff often draft company newsletters, reports, pitch decks, speeches, and presentations on their behalf.

Meeting and Event Preparation

- Coordinate agendas for CEO approval before leadership team and board meetings.
- Organize company retreats, conferences, and other special events.

Project Management

- Oversee large, often cross-functional, organization-wide projects or initiatives; bring together important stakeholders and help drive decisions.
- Research, perform benchmarking, analyze data, and make recommendations.
- Propose the creation of new systems and processes to streamline operations.

Strategic Planning and Alignment

- Lead annual strategic planning process for the company by acting as a project manager and ensuring alignment with the CEO and leadership team.
- Help determine key performance indicators and update dashboards as needed.

Hiring and Management

- Manage hiring process for leadership roles reporting to the CEO: In partnership with HR teams, chiefs of staff can take over the more administrative aspects of hiring managers. They may also draft and post job descriptions, outline interview processes, and screen candidates.
- Manage other members of the “office of the CEO”: Chiefs of staff may hire and directly manage others in CEO support roles, such as executive assistants, special projects managers, speech writers, etc.

What is unique about the role in the nonprofit setting?

Nonprofit chiefs of staff play similar roles to those in corporate settings, taking on many of the above responsibilities. However, given the typically limited resources of nonprofits, chiefs of staff may take on an even wider variety of activities than their corporate counterparts.

Two areas where nonprofit chiefs of staff can play a unique role include board management, and engaging funders and other key stakeholders.

- **Board management:** Chiefs of staff often establish the cadence of board meetings, as well as get ready for those meetings by preparing and sending out materials in advance. For example, they may collect data from across the organization, such as financial updates or program outcomes, to create dashboards that lay out the information in a concise and clear format. They may also help onboard new board members, monitor term lengths, and support CEOs in researching and recruiting new board members.
- **Engaging funders** and stakeholders: Chiefs of staff support CEOs in maintaining strong relationships with key funders and stakeholders. If organizations have smaller development teams, chiefs of staff can step in to support CEOs in this area, for example, by supplying background information on potential new partners or funders. They also may maintain lists of funders, stakeholders, and partners with whom their CEOs want regular contact, and tee up communications or arrange meetings to support ongoing relationship building.

Many of these duties may sound similar to those of a chief operating officer. Though there is overlap in the operational and strategic aspects of these roles, [they are fundamentally different](#). Ultimately, chiefs of staff support CEOs directly, whereas COOs support the organization.

When do you know you need a chief of staff?

Nonprofit leaders often consider adding this role to their teams when:

They just don't have enough time in their days. Leaders strapped for time often miss key opportunities and deadlines. Chiefs of staff can give back this time by doing or delegating work on the CEOs' behalves. They can also keep an eye on important deadlines, ensuring the work that only leaders can do is done well and on time.

They're not satisfied with how their time is being spent. Leaders often feel like their time is both too limited and too easily wasted. "Executives are never satisfied with how they currently spend their time when we begin working with them. They need a saving grace," says Catherine Berardi, founder and CEO of [Prime Chief of Staff](#), a firm exclusively focused on placing, onboarding, developing, and coaching chiefs of staff. Chiefs of staff help redirect leaders' focus to areas in which they'll have the greatest impact. (However, if the work taking up unnecessary time is more administrative in nature, like managing a calendar, travel, or expenses, it may be that an [executive assistant](#) rather than a chief of staff is needed.)

Their leadership team is not operating at peak performance. Vacancies, underdeveloped talent, conflicting viewpoints, or work that doesn't fall cleanly to a C-suite leader impacts the performance of the leadership team. Chiefs of staff act like glue amongst leaders, rallying them around a common goal. Because chiefs of staff are closely aligned with CEOs, they can often serve as proxies to facilitate meetings and ensure momentum and clarity around next steps. As one education nonprofit chief of staff recently told me, "Before I joined, the leadership team meetings would end and no one would have any idea what their directives were."

Their organizations need more efficient systems and processes. Clunky or inefficient processes hampers leaders' and organizations' ability to run efficiently and meet important goals. Chiefs of staff work with leaders to build structure and improve efficiency. For example, the chief of staff for a large family foundation recently had staff undergo pattern recognition training, saying, "We weren't recognizing problems that were happening multiple times, so I conducted a training to help our team identify these occurrences sooner."

They're implementing new strategic plans. Any new strategic vision requires a focused leadership team and a supportive broader staff to be fully effective. Chiefs of staff can provide essential assistance to leaders on leadership team engagement and also serve as culture champions during periods of change. Without proper implementation, new strategic plans can quickly fall flat, but chiefs of staff can be key players in keeping employees aligned and involved throughout the process.

How do you hire a great chief of staff?

The most important aspect of this partnership is the fit between the CEO and the chief of staff. Rather than an identical match of personality traits and technical competencies, they should have complementary attributes that enhance each other's productivity and establish a close rapport. Although both roles vary by organization, certain skills and traits are likely to lead to success among chiefs of staff.

The most promising candidates will have:

Ability to get things done: Great chiefs of staff are results-driven and meet adversity with tenacity. They are master organizers and project planners who consistently look ahead and anticipate needs before they arise.

Strategic mindset: Chiefs of staff must be natural problem solvers who are analytical and structured in their thinking. They create order out of chaos by identifying systems and processes in need of adjustment. They deeply understand business operations and can synthesize information to recommend a plan of action.

Emotional intelligence: Chiefs of staff should be both highly self-aware and perceptive toward the CEO and other key relationships. They should serve as connectors who are aware of every key project and can connect the dots across the company. Successful chiefs of staff are positive, empathetic, flexible, and curious. Most importantly, they are respected by their colleagues.

Loyal and selfless: Leaders must be able to implicitly trust their chiefs of staff, and loyal chiefs of staff are constantly looking for ways to offer support. They must be confident enough to be candid when needed, while also humble enough to work behind the scenes.

Where can I find a chief of staff?

Hire internally: One obvious place to look for a great potential chief of staff is within the organization. The role is a unique opportunity for a rising star to build a broad skillset and build relationships with key leaders across the organization. Some organizations create a rotational role around this position (see sidebar, "Chief of Staff as a Rotational Role").

Search externally: To source the role externally, share the job description with networks or post it online. Given the critical nature of the role and the importance of a strong fit, it may be wise to engage an executive search firm experienced with this role.

Once hired, the next step is to onboard the new chief of staff. New chiefs of staff should spend several days shadowing their CEO to understand how their CEOs' time is spent and what kind of support is needed most. Chiefs of staff and CEOs should also map out objectives for the first 90 days of the role and determine how to divide priorities and allocate time on a daily and weekly basis. They should also meet with all of the CEOs' direct reports and any other key stakeholders, staff, or board members they will work with on a regular basis to begin building relationships.

Chief of Staff as a Rotational Role

Tyler Parris notes that many companies treat the chief of staff role as a rotational position to grow and nurture promising leaders. “Companies that structure the position as a rotational role lasting 18 to 36 months are always moving new people into the position and giving more people access to that growth opportunity,” Parris writes. “Individuals come out of the role ready to fill leadership positions that they previously couldn’t have,” he continues, “because they learn so much about the business, enjoy numerous and deep relationships with people in powerful positions, and earn what some call a ‘mini-MBA’ through on-the-job training. In a relatively short time, they are exposed to situations, nuances, operating tempo and the complexity of decision making that otherwise would take years to experience.

Chiefs of staff should also take charge of their own professional development, including networking with chiefs of staff in other organizations and reading articles from those who have been successful in the role. (See resources in the sidebar, “Additional Resources”.)

Additional Resources

Learning more about the chief of staff role:

[Chief of Staff: The Strategic Partner Who Will Revolutionize Your Organization](#)

[Six Archetypes of an Effective Chief of Staff](#)

Hiring a chief of staff:

[How to Write a Chief of Staff Job Description](#)

[Hiring a Superstar Chief of Staff](#)

Resources for chiefs of staff or prospective chiefs of staff:

[Prime Chief of Staff Resource Hub](#)

[Chief of Staff Expert](#)

The chief of staff role can provide critical support to leaders whose time is invaluable. As shared by Aimée Eubanks Davis, the CEO of [Braven](#): “Having a chief of staff has been critical to my success as a leader. As the CEO of a fast-growing start-up nonprofit, there are always a million balls that I am juggling, many of which would no doubt fall without the support of my chief of staff. She helps make sure that I go into every meeting ready, that my team is getting what they need from me, that we are well-prepared for board meetings, that I’m communicating frequently both internally and externally, and that all of our various organizational strategic priorities are moving forward seamlessly. I’m so grateful for this capacity to help steward the organization.”



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