

From Confusion to Clarity:

How Rose + Porterfield Transformed Communication and Staff Alignment at An International Health and Welfare Non-Profit During a Major Leadership Changeover.

The Situation

When a long-standing international health and welfare non-profit hired a new CEO to implement a major shift that would help the organization embrace 21st-century approaches, they faced significant cultural challenges.

“The CEO was highly credible and skilled, but came from outside the public charity sector,” says the organization’s former General Counsel and Interim CEO. “They were trying to build relationships with a set of leaders who were used to working in silos and were worried about losing their position within the organization. Trying to engage everyone in a new way of working was difficult.”

Rose + Porterfield was brought in to improve communication, facilitate a smooth leadership transition, and following an additional leadership change-over, create the conditions required to set the eventual permanent CEO up for success.

With the leadership situation constantly evolving, fostering cross-organizational stability, trust, and collaboration was time-critical.

The Challenges

Employee inertia together with the CEO’s short history in the public charity space was affecting staff buy-in and alignment – especially with the organization having recently been the subject of a public relations incident.

These challenges were further compounded when the CEO stepped down, necessitating replacement by an interim CEO. A culture of low loyalty, lack of engagement, and poor communication resulted as team members awaited the arrival of the permanent CEO. “I was also dealing with a very junior leadership team and needed to bridge the gaps in experience and skill while also getting things in shape for the future permanent CEO,” says the former Interim CEO and General Counsel.

The Solution

Rose + Porterfield’s goal during the initial engagement was to create an intentional, collaborative approach to implementing the new strategic plan – and improve communication across the organization.

“They provided tools and resources to help staff navigate new ways of communicating to create a more team-like environment and streamline processes, reduce confusion, and consolidate discussions,” says the former Interim CEO and General Counsel. “Even simple changes like taking notes and capturing deliverables during meetings made a big difference.”

Team members were also trained in the different ways people prefer to receive information, with new communication strategies and approaches demonstrated. These approaches helped the team coalesce around the new strategic plan.

When the new CEO stepped down, the strategy shifted toward helping the interim CEO manage a junior leadership team who was largely waiting for the permanent CEO to arrive and build skills and experience to set the future CEO up for success.

“I was working with a team who didn’t have the skills or resilience to deal with this state of flux. Rose + Porterfield helped me understand that and manage accordingly.”

The Results:



Rose + Porterfield’s strategic interventions provided actionable ways to improve communication throughout the organization, encourage alignment around the new strategic plan, and ensure that competent leaders were developed and supported. These foundational items also created the conditions for a seamless transition for the incoming CEO.

“The insights and resources Bob Rose and Robyn Porterfield offered were insightful and concrete,” says the former interim CEO and General Counsel. “Those who did the work benefited and made the organization better.”

She notes that Rose + Porterfield’s commitment to working with the organization on a long-term basis provided the new CEO and changing board with a robust foundation and solid understanding of what was working, what wasn’t, and what needed to change.

“Rose + Porterfield helped the organization identify challenges, opportunities, and priorities for when the new CEO came in,” she says. “Their ability to help an organization remember its mission while dealing with a leadership crisis was excellent – and made us a better team and organization overall.”