Interim Executive Solutions
GETTING YOU TO WHAT'S NEXT

THE Caleb GROUP

Successfully transitioning leadership from a founding family

The situation:

With operations in 29 properties across four states, The Caleb Group is one of New England's better-known providers of affordable housing with integrated support services for low-income residents. Founded 30 years ago by Warren and Joan Sawyer -- real estate developers with Peace Corps experience who saw the need to create more affordable housing -- this nonprofit had been led full-time by their daughter, Debbie Sawyer, for four years.

As she neared retirement, there was no clear successor waiting in the wings. The board knew they would have to search for a new Executive Director. They also knew a transition plan would be needed to help the organization as it evolved from founding-family leadership to its next generation of leadership operating in a complex industry.

An interim period would help the board understand the organization's priorities and prepare the incoming leader to succeed.

The IES response:

Board members of The Caleb Group sought advice from Interim Executive Solutions (IES), a national organization that exclusively focuses on nonprofit leadership transitions, on the best way forward for the organization to preserve, and even enhance, its services. They were impressed with the breadth and experience of the IES network and asked David Harris, their Managing Partner, to identify candidates to consider.

IES introduced two candidates, including Brian Gallagher, who had 17 years of nonprofit leadership experience. Knowing he enjoyed "making order out of chaos," Brian had demonstrated experience leading organizations through transitions and had been a Network Member of IES for two years.

When Brian started in March for what became a 10-month assignment, he saw his role as "a bridge to the staff, a bridge to the board." He ultimately addressed a vital software platform upgrade, clarified senior leaders' roles and established new board committees. He also left a list of recommendations for internal changes that his successor could tackle.

During the initial transition period, Debbie Sawyer attended a series of farewell events and remained with the organization until October to help see several key property acquisitions through to closing.

Brian focused his first months on assessing the organization's operations, governance and staffing structures, and technology. Taking what he called a "one bite at a time" approach, he worked in partnership with the board, especially its chair Roxie Severance, and identified internal priorities that could be addressed during his time as Interim Executive Director.

Given the importance of data and financial management within such a complex and highly-regulated environment (affordable housing), it was clear to Brian that The Caleb Group's use of Yardi (a cloud-based property management and real estate accounting software platform) could be better optimized. Brian identified a specialized resource to lead this project, and together with

staff leadership, the organization made key improvements to the system and core processes over several months.

Through his organizational assessment, Brian identified several other urgent issues to address: establish a clearly defined Senior Leadership Team; improve communication across departments for greater employee engagement; establish a regular staff meeting cadence; develop practices to better coordinate operations; and create new, and clarify the goals of existing board committees.

Board support, particularly from Roxie, was essential, Brian said. Roxie had worked for The Caleb Group years before as a resident services coordinator. Her career then shifted to healthcare administration, and, in 2020, Warren Sawyer asked her to join the board.

“Brian didn’t shy away from anything hard,” said Roxie. “It was certainly an opportunity for the organization to get its feet solidly on the ground before they picked a long-term leader.”

When a leader is retiring, Roxie reflected, “we don’t know what we don’t know. So, we needed Brian to go in and tell us what we needed.”

A “very talented man,” Roxie continued. Brian came in and “really set the stage” for a permanent ED.

Moving Forward:

When Shawn Smitley read The Caleb Group job description, he recalled saying with some surprise, “this is my job – this is what I do today” in his position with national non-profit Mercy Housing. His family had recently relocated to New England and the “timing for this job opening couldn’t have been better,” he said.

After interviews with the board and every senior manager, Shawn was hired and began in January 2025, overlapping with Brian for one month. With Roxie checking in with him regularly and Brian available by phone as needed, Shawn felt his onboarding went well.

“It was a wonderful transition,” he said about stepping into Brian’s shoes. Brian’s assessment work had identified and prioritized the challenges facing Shawn on day one. “He gave me that baseline I needed.”

Shawn took his first year to understand the property portfolio, clarify corporate structure, rebuild the board, and identify specific roles and responsibilities for the 75 staff members. He used his accounting background to upgrade records and learn how best to leverage the software system.

Now in his second year, he has begun to implement changes and make new hires.

With The Caleb Group stabilized and refocused, Shawn foresees property acquisitions and greater impact.

“I think we have a nice niche right now,” Shawn said. "But to really expand and grow, we need to have key items in place and that will take time.”

His 10-year goal aims high. He wants to see The Caleb Group on the top 100 list of affordable housing developers.