

Third Sector New England

Executive Transitions Program Client Feedback 2008-10 Internal Report June 2011

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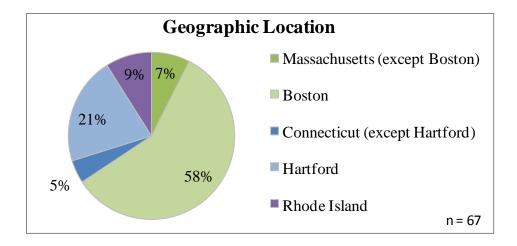
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I. Introduction

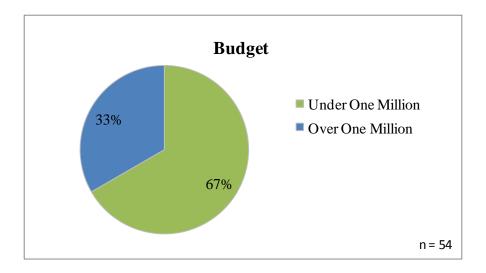
Third Sector New England (TSNE) sends surveys to all its Executive Transition Program clients at three points in time: one month after intake; one month after the organization hires a new executive director, and one year after the executive director has been put in place. These surveys help TSNE gather data on our consultant and interim leader matching process, executive director hiring process and outcomes, and impact of the comprehensive transition process. In the period between June 2008 and July 2010, there were a total of 67 organizations who actively engaged in intake, hiring, and/or one year post-hire process. 16 individuals (out of 23, a 70% response rate) from 13 organizations responded to the intake process evaluation, 79 individuals (out of 165, a 48% response rate) from 36 organizations responded to the one month post-hire survey, and 23 individuals (out of 55, a 42% response rate) from 14 organizations responded to the one year post-hire survey.

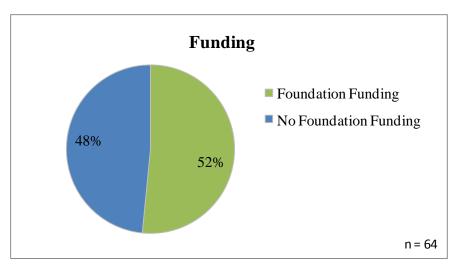
Demographics

For all the charts in this report, the numbers are based on the respondents who answered the question, and excluded those who responded "Don't Know" or "Doesn't Apply."



Sector	Number	Sector	Number
Animal Rights	1	Human Service	14
Arts	7	Immigrant	1
Capacity Building	2	Museum	1
Community Development	1	Organizing/Advocacy	7
Education	1	Philanthropy	1
Environment	5	Public TV/Radio	4
Health	7	Women	6
Housing	3	Youth	6





Strong, Positive Results

In the one year post- hire survey, which is focused on Executive Transition programmatic outcomes, the majority of individuals report agreeing that:

- The board is stronger as a result of the transition process
- The new executive director has the skills to achieve the organization's vision
- The executive director is a good "fit" for the organization's culture
- Relationships among and between various people are strong
- Organizational challenges or development work recommended in the assessment during the transition have been or are in the process of being addressed
- The executive transition services received were valuable to very valuable to the organization

"Laid out the alternatives with clear analysis."

The one month post-hire respondents let us know that overall the executive transitions services were excellent or highly satisfactory. Some of the comments from people when asked "In what specific ways was the executive transition process helpful to your organization in dealing with the challenges of your executive transition" included:

"Interim period was used effectively as a 'time-out', allowing an assessment of our future-looking needs and providing a stabilization period."

"The TSNE Consultant's depth of experience and wisdom in dealing with these situations helped the committee in making the right decisions – without 'pushing' us in particular directions. Rather, she laid out the alternatives with a clear analysis."

"A sensible methodology that works, attention to detail and process."

"Provided the time to do it right and do it well."

"Provided the time to do it right and do it well."

"The interim leader identified some real weakness in the senior management team that could ultimately have had disastrous consequences for [the organization]. She brought in a very capable financial transition team to help straighten out some of the issues, resized the organization to better match revenue levels, and helped clarify roles and responsibilities of both the staff and the board. She's left the organization in much better shape, both financially and organizationally. This will allow the new ED to focus on revenue and relationships."

"People had time to adjust to the idea of new approaches, and we were welcoming to a new ED after the long tenure of a beloved ED."

The vast majority of individuals and organizations responding were also highly satisfied with the Executive Transition Program's various elements: intake, establishing a transition committee, coaching of the departing executive, assessment – including creating a plan to address any organizational challenges raised through the assessment before the hiring of the executive director; reviewing issues of diversity and equal opportunity and finally, satisfaction with the executive director hired. One area that needs attention along the continuum of executive transition services is the "thrive phase" or the post-hire services. Fewer individuals knew whether these services were being offered and many could not afford or did not receive funding for this phase of support. TSNE will more deeply review this aspect of its executive transition services to more fully articulate its efficacy and importance to ensuring a healthy transition.

Executive Transitions Program Client Feedback 2008-10

¹ This quote is a perfect description of how ETP helps organizations "put out fires".

II. Client Feedback One Month Post-Intake

During the period between June 2008 and July 2010, TSNE conducted 31 intakes into its Executive Transitions Program (ETP). Of that number, 24 went on to receive services and 16 filled out a survey to provide feedback on our intake processes.² All except one respondent said that they did not interview any other firm to support their executive transition.

The majority of groups spoke to the quality of the intake process or ETP/TSNE's reputation as the key factor that lead them to choose to work with this program. One client described this as "The thoroughness of all communications combined with the clear demonstration of deep levels of skill amongst the consultant pool." The connection to and support of philanthropic partners is also important, with several groups mentioning the Hartford Foundation for Public Giving in particular and one group mentioning the Barr Foundation and another the Rhode Island Foundation. "We did do preliminary research on other options. The combination of our excellent initial experience with TSNE and the prospect of Barr support made us choose to pursue TSNE." Almost all respondents found out about ETP through word of mouth from other nonprofits, board members, funders, or consultants.

Executive Transitions Program Quality

The Executive Transitions Program staff members have done an excellent job facilitating the intake process.

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3- 5	Respondent #
Timeliness of TSNE's response to our initial call	0.0%	0.0%	0.0%	12.5%	87.5%	100.0%	16
Quality of information received in the initial call	0.0%	0.0%	0.0%	12.5%	87.5%	100.0%	16
Quality of program written materials	0.0%	0.0%	6.3%	37.5%	56.3%	100.0%	16
Level of skill demonstrated by ETP staff during the intake process	0.0%	0.0%	6.3%	12.5%	81.3%	100.0%	16

When asked what other information ETP could provide a group before they sign a contract, responses included "More info about how TSNE views the role of the transition team," "Maybe a few more specific experiences to determine approaches, challenges, solutions," and "We were well informed prior to the start of our program." During the course of these two years, ETP has worked to improve its written materials.

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² Half of those who did not go on to receive services did not work with any organization, due to financial limitations.

Transition Consultant Quality

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3- 5	Respondent #
Level of skill demonstrated by the Transition Consultant in the first meeting	0.0%	0.0%	6.7%	20.0%	73.3%	100.0%	15
Quality of the Scope of Service proposal describing organization's needs	0.0%	0.0%	0.0%	40.0%	60.0%	100.0%	15

93-100% of respondents responded either highly satisfactory or excellent.

Interim Executive Director Quality

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3- 5	Respondent #
Level of skill demonstrated by the IED in the first meeting	0.0%	0.0%	10.0%	40.0%	50.0%	100.0%	10

[&]quot;We chose TSNE for help hiring an Interim ED. The placement has been excellent and well worth the fee, as our own networks would not have led us to the candidate we hired."

III. Client Feedback One Month Post-Hire

79 individuals from 36 organizations responded to the survey sent to the members of the organization's transition committee. The organizations had an average of 2.2 respondents, with a high of 4 respondents.

"Structure in a time of chaos."

Overall, the program delivers on its promises, and clients are very satisfied. The Executive Transition Program provides "structure in a time of chaos." Respondents valued having an outside professional help the board and staff navigate the transition process in an organized and effective manner. In the qualitative responses regarding value of services, most respondents paid high compliments to the transition process (particularly the assessment) and the expertise of their Transition Consultant (particularly their facilitation skills).

"It was incredibly beneficial to have an outside person with vast experience with the transition process guide us through the year. The Consultant guided the board through the detailed transition steps and assisted in terms of providing broader perspective. She helped us look inward to flesh out problem areas. The process itself encouraged the board to address areas of concern and to approach the search for an executive director thoughtfully and methodically." "I do think it was the best solution to have someone from the outside come to the agency to help the staff and others work through the process of a departing long term executive director."

When asked what challenges/obstacles their organization faced during the transition, 37 responded, listing a wide variety of challenges. The most common topics touched on in the qualitative responses were human resource issues/staff morale, financial issues, and issues with particular details of how the search process was carried out. Responses included: "disorganization, apathetic members, dissent, and misunderstandings, lack of funds;" "severe financial and cash issues, staff conflict, and poor performance by some staff;" "It required a lot of meetings and committee time - which was hard to come by, but we came to value the process and the results;" and "Considerable skepticism about need for a consultant."

When asked how ETP could be improved, 14 had recommendations for improvement, and 16 said they had no recommendations. The recommendations for improvement were all different, mostly involving small search process improvements.

"No. It can never be without some pain and unexpected occurrences."

"We would probably seek to hire a recruiter in addition to a Transition Consultant at the outset. I think these are two distinct skill sets and should not be combined. In the end, we determined that we needed an active recruiter to find people who were not looking for a new job."

"TSNE has to do a better job of educating the local community foundations about the importance of supporting this work."

Thirty-five organizations provided transition committee membership numbers. It is interesting to note that 40% reported having external stakeholders on the hiring committee, ranging from 1 to 3 external stakeholders with an average of 1.6. 74% of organizations reported having staff on the transition committee with up to 4 staff participating, at an average of 2. All thirty-five organizations reported having board members serving on the transition committee, with a range of 2 to 12 board members at an average of 4.4.

Services Provided by Transition Consultant

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3-5	# Respondents
Establishing a transition committee	0.0%	1.7%	12.1%	29.3%	56.9%	98.3%	58
Coaching departing Executive	6.3%	0.0%	25.0%	25.0%	43.8%	93.8%	16

[&]quot;Much more of the focus should be post hire."

Assessmentorganization strengths and challenges were described accurately	0.0%	2.6%	6.4%	28.2%	62.8%	97.4%	78
Transition committee reviewed issues of diversity and equal opportunity	0.0%	1.4%	10.0%	34.3%	54.3%	98.6%	70
Plan developed to address org challenges that could hinder hiring of best candidate	2.8%	4.2%	8.5%	32.4%	52.1%	93.0%	71
New leader profile accurately captures leadership opportunities for next 3-5 years	0.0%	1.3%	5.3%	28.9%	64.5%	98.7%	76
Search was far-reaching enough to attract diverse pool of candidates	0.0%	0.0%	16.9%	21.1%	62.0%	100.0%	71
At least two qualified candidates to interview	0.0%	3.0%	7.6%	16.7%	72.7%	97.0%	66

Overall, the Transition Consultants are doing an excellent job, scoring 93% or higher in the 3-5 range for all of the items. Regarding respondents' satisfaction with the Transition Consultant's management of the executive transition, overall 97.4% were satisfied to very satisfied. 77 individuals responded to this question.

[&]quot;The Transition Consultant made this process productive, not traumatic."

1- Not Particularly Valuable, 5- Very Valuable	1	2	3	4	5	Sum 3-5	# Respondents
Value of ET services provided, for you personally	2.7%	2.7%	6.7%	25.3%	62.7%	94.7%	75
Value of ET services provided, for the organization	1.3%	5.3%	4.0%	17.3%	72.0%	93.3%	75

The perception of the value of ETP services one month post-hire also scores well. The one-year responses to this same question are even higher, garnering 95.2% and 100% ratings respectively. This section abounded with praise for the value of ETP work.

[&]quot;I had a bad experience previously and was nervous. The Transition Consultant was amazing. I have started recommending TSNE to people who tell me they are in similar situations."

[&]quot;I learned a great deal and got invaluable assistance from the Transition Consultant, the whole organization was sold on the value of her consultancy, and everyone's minds have been opened to new possibilities."

"We were at a very dicey time as an organization and a long drawn out transition could literally have been deadly. We succeeded in finding a match."

"The search process was long, but in the end very worthwhile."

"The search process was long, but in the end very worthwhile."

"Board leadership instincts would have pushed the organization to make a rapid transition, likely to someone within reach - known and available - and this process, while lengthy, probably saved the organization from making a bad choice at a critical time."

"The process strengthened the organization in that we have a better understanding of our mission and direction; board and staff have a stronger relationship; and we have a plan to address some of our challenges."

100% of respondents either said that the hiring was legally compliant or that they did not know.

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3-5	# Respondents
Project met contracted deliverables	0.0%	1.3%	13.0%	22.1%	63.6%	98.7%	77
Transition Consultant delivered on time or adjusted to mutually agreeable timeline	2.5%	2.5%	8.9%	16.5%	69.6%	94.9%	79
Project met financial estimates	3.6%	5.4%	7.1%	30.4%	53.6%	91.1%	56
Overall satisfaction with executive transition services	0.0%	2.5%	10.1%	21.5%	65.8%	97.5%	79

Most of the qualitative comments regarding timeliness, deliverables, and cost were highly complimentary. One respondent noted that "The Transition Consultant is really a professional and that was a refreshing change from our all volunteer board. We needed her expertise and her calm voice of reason during this very stressful time. She always kept a professional demeanor and her role was critical to moving us forward." However, a few respondents felt that the timeline was dragged out a bit. Two felt that their consultant was too busy and could not be flexible enough with scheduling. There was dissatisfaction with the project meeting financial estimates in several instances.

Thrive Phase

Out of the 32 organizations who knew whether or not they had contracted for the Thrive Phase, only 50% contracted to do it. It appears that although many organizations agreed to engage in the Thrive Phase at the beginning of the contract, their interest in engaging in the Phase when the new ED was hired was variable. One issue was that many groups did not budget enough funds for the entire process, and thus did not have enough funds for thrive support. Several of the Transition Consultants and interim leaders offered pro bono support during this phase.

Out of those who engaged in Thrive, many organizations were just beginning this service at the time of this survey (one month post-hire) so there is less feedback. ETP is developing different ways of engaging the transition committee and/or board in this phase.

"We ran out of money/time on the initial contract, so we are putting together the resources to initiate a new contract. We very much want to continue with the Transition Consultant's support."

"We are going to use the pro-bono time [the Transition Consultant] has donated for this post-hire work."

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3-5	# Respondents
Transition Consultant explained post-hire support options	0.0%	4.2%	8.3%	29.2%	58.3%	95.8%	48
Quality of post-hire work, to date	3.2%	3.2%	3.2%	16.1%	74.2%	93.5%	31

Interim Executive Director

Overall, the Interim Executive Directors are doing an excellent job. The qualitative comments give glowing praise for the work of the Interim EDs.

1- Unsatisfactory, 5- Excellent	1	2	3	4	5	Sum 3-5	# Respondents
Interim executive's management skills	3.3%	0.0%	6.7%	23.3%	66.7%	96.7%	30
Interim executive's level of knowledge of issues facing org	3.3%	3.3%	3.3%	23.3%	66.7%	93.3%	30
Interim executive's experience	0.0%	3.2%	3.2%	22.6%	71.0%	96.8%	31
Interim executive's "fit" with the organization's culture	0.0%	3.3%	13.3%	23.3%	60.0%	96.7%	30
How the interim prepared the organization for the new ED	0.0%	0.0%	14.3%	32.1%	53.6%	100.0%	28

Of particular note is that 100% of respondents were satisfied with how the Interim ED prepared the organization for the new ED, and out of that, 85.7% rated this item as highly satisfactory or excellent.

According to the respondents, the Interim ED most commonly focused on staff/internal systems and/or financial issues.³ When asked whether the issues that the Interim ED was focused on were satisfactorily resolved, 43.3% marked it as 5 ("Very Satisfied"), 40% as 4, 10% as 3, 3.3% as 2, and 3.3% as 1. Overall, 93.3% were satisfied to very satisfied.

The qualitative comments are extremely positive. However, there were two who felt that the Interim ED did not have a strong enough grasp of financial issues.

"The Interim would receive our highest recommendation for anyone needing Interim ED services. She not only stabilized the organization, but made significant progress in a short period of time, leaving the organization in excellent condition for the incoming ED."

"Fantastic. Managed a difficult situation with grace."

"I cannot say enough about the Interim's contributions to our organization. In my view she saved us. Our new ED is coming into a far healthier organization because of her work." "Our new ED is coming into a far healthier organization because of her work."

Two respondents expressed a desire for TSNE to have done a better job of trying to convince them to use an Interim ED. "I think that when an organization is as financial shaky as ours was, it may be better for TSNE to insist or try to insist that the organization employ an Interim ED first. I don't know if we could have heard you had you done so, but in retrospect we should never have done that first search. It used up what few resources we had and was ultimately unsuccessful. On the other hand, it got us to the place where we knew we needed an Interim." "I would recommend that an organization wishing to forego the option of using an outside interim executive director be given thoroughly honest advice on the challenges that are likely to arise. [Our organization] named an existing staff member and candidate for the executive director position as interim executive director. At certain points in the process, especially during the interview process, that choice presented challenges."

Recommend to Others

When asked whether they would recommend their Transition Consultant and/or Interim ED to another organization, 51 responded to this open-ended question. Out of that group, 90% would recommend their Transition Consultant to another organization, and 62% out of the total 90%

³ The 20 qualitative responses to this question were analyzed to find common themes. 75% discussed staff/internal systems issues, and 65% discussed financial issues.

would highly recommend their Transition Consultant to another organization. 4% would recommend with reservations, and 6% would not recommend their Transition Consultant.⁴

"Absolutely YES! She is a consummate professional, met all requirements and needs of our team and was extremely knowledgeable with experience and examples to assist us in overcoming obstacles."

"I would highly recommend our Transition Consultant. She guided us every step of the way. We were under a lot of pressure to hire someone as quickly as possible. The Transition Consultant made sure we did a thorough search, helped us through all the rough spots and found us an excellent Executive Director."

"Yes, the support and work they provided for [our organization] was extremely sensitive and helpful in this time of uncertainty."

"Both were extremely helpful to stabilize the organization, and repair/build relationships among various constituent groups. Both had a keen sense for how to work through some fairly difficult interpersonal issues that were getting in the way of dealing with real financial and other management issues of the organization. The Interim, in particular, was just fabulous."

IV. Client Feedback One Year Post-Hire

23 individuals from 14 organizations responded to the survey sent one year after the hiring of the new executive director. 96% were original members of the transition committee. Most were board members, and a few were staff. 96% reported that the executive director was still present; one person reported that the executive director was not.

This evaluation is quite unique among executive transition providers in that none are doing a one year post-hire survey that tests how a hiring intervention withstands the test of time. Executive transitions are complex and difficult, particularly since it is a time of disruption. Overall, survey results communicate that TSNE's work has strengthened the organization and positively influenced it in the long run.

This evaluation is quite unique among executive transition providers in that none are doing a one year post-hire survey that tests how a hiring intervention withstands the test of time.

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⁴ The qualitative responses were analyzed, with each response designated as "Highly Recommend," "Recommend," "Recommend with Reservations," or "Not Recommend."

⁵ The options for this question were: Past Executive Director, New Executive Director, Board Member, Other Staff, and Other. All chose Board Member except for two that chose Other Staff and one that chose Other.

Depth of Transition Work

1- Strongly Disagree, 5- Strongly Agree	1	2	3	4	5	Sum 3-5	# Respondents
Leadership profile developed during the transition remains a good fit for the job and is still in use	0.0%	0.0%	13.0%	39.1%	47.8%	100.0%	23
Vision statement developed during the transition consultation still guides the work of the organization	0.0%	9.1%	36.4%	36.4%	18.2%	90.9%	22
Skills the ED brought to the position are sufficient to lead the organization in the achievement of its vision	8.7%	4.3%	8.7%	26.1%	52.2%	87.0%	23
Organizational development work recommended in assessment has been and/or is in process of being addressed	4.5%	0.0%	27.3%	54.5%	13.6%	95.5%	22
The board is stronger as a result of the transition process	4.3%	4.3%	26.1%	39.1%	26.1%	91.3%	23
Support for new ED by Transition Consultant and/or IED enabled new ED to thrive in first six months	8.7%	8.7%	17.4%	39.1%	26.1%	82.6%	23
The new executive director is a good "fit" for the organizational culture	4.5%	9.1%	13.6%	18.2%	54.5%	86.4%	22

Impressively, 91.3% of respondents agree that the board is stronger directly as a result of the transition process. This survey went out to all participants, including those who did not participate in the "Thrive" phase of post-hire support, which may be part of why only 82.6% agree that "Support for the new executive director by the Transition Consultant and/or Interim ED enabled the new ED to thrive in the first six months."

Regarding "Skills the ED brought to the position are sufficient to lead the organization in the achievement of its vision" and "The new executive director is a good 'fit' for the organizational culture," over half of the respondents strongly agree with these statements, but a minority strongly disagree with these statements. Upon closer analysis, all of the "1" and "2" designations for these two statements came from the same three individuals, who were associated with two organizations. Were it not for the negative feedback from these two organizations, these two items would have had 100% agreement.

Several organizations commented on how the board had grown stronger as a result of the transition:

"The time, process and interaction together developed an esprit de corp."

"The 'process' people, with lots of patience and belief that longer process adds value, have now gained some credibility with the 'anti-process' people. The success of the longer transition still has an afterglow."

"Stronger because of the transition process that was used and stronger because the new ED started with a good understanding of the position."

"The board gets along well and truly enjoys one another. It was probably the best thing that happened to us and prepared us for the strategic planning process."

Strength of New Relationships

Survey takers were asked to rate, on a scale of 1 to 5, their satisfaction with relationships between the executive and staff; executive and board; executive and collaborators; board and staff; board and community; and executive and community.

1- Very Unsatisfied, 5- Very Satisfied	1	2	3	4	5	Sum 3-5	# Respondents
Executive and Staff	8.7%	8.7%	13.0%	13.0%	56.5%	82.6%	23
Executive and Board	4.8%	4.8%	14.3%	38.1%	38.1%	90.5%	21
Executive and Collaborators	0.0%	15.8%	15.8%	36.8%	31.6%	84.2%	19
Board and Staff	0.0%	13.6%	22.7%	36.4%	27.3%	86.4%	22
Board and Community	0.0%	0.0%	36.8%	36.8%	26.3%	100.0%	19
Executive and Community	4.5%	4.5%	18.2%	31.8%	40.9%	90.9%	22

Changes to the Organization, Compared to One Year Ago

1- Worse, 3- the Same, 5- Better	1	2	3	4	5	Sum 3-5	# Respondents
Organization's financial position	9.1%	4.5%	13.6%	31.8%	40.9%	86.4%	22
Quality of services	0.0%	0.0%	27.3%	40.9%	31.8%	100.0%	22
Number served/Scope of services	0.0%	0.0%	28.6%	38.1%	33.3%	100.0%	21
Organization's external reputation	0.0%	5.0%	15.0%	35.0%	45.0%	95.0%	20

All of these elements are affected by a number of external factors, so the high level of positive change is quite remarkable. As one might expect, since this survey was administered during the financial downturn, 13.6% had a financial situation that was worse than a year ago.

One Year Post-Hire Feedback Overall

Even one year after the transition, respondents are very pleased with the work done by the Executive Transitions Program. 95.5% are satisfied with the Transition Consultant's

management of the transition. Within that, 72.7% chose 5, 13.6% chose 4, and 9% chose 3. Only 5% (one respondent) chose 2, and none chose 1.

1- Not Particularly Valuable, 5- Very Valuable	1	2	3	4	5	Sum 3-5	# Respondents
Value of ET services provided, for you personally	0.0%	4.8%	9.5%	19.0%	66.7%	95.2%	21
Value of ET services provided, for the organization	0.0%	0.0%	17.4%	13.0%	69.6%	100.0%	23

When one takes into consideration the complexity and degree of external factors affecting executive transitions, particularly some of the more difficult cases ETP took on during this timeframe, the overall high levels of positive feedback are extremely impressive.

Ninety-five to 100% of respondents felt that the following were important to very important to do during an executive transition process:

- "Approaching the transition as a learning opportunity for the organization"
- "Intentionally engaging staff during the transition process"
- "Sharing information with candidates about the organization's opportunities, strengths, AND challenges"
- "Ensuring that the general strategic vision of the organization is agreed to prior to seeking candidates"

Finally, 90% felt that including both staff and board on the transition committee was important to very important.

Concluding comments from respondents included:

"The Consultant was terrific. This was a difficult search, which took much time and we had to make difficult decisions. She was very good at keeping us on track and doing what we needed her to do."

"Despite the difficulty in losing a long term ED, it is possible to transition smoothly with the right resources."

"We respected each others' opinions and concerns, and as a result, developed a stronger working relationship within our board."

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