



2013

NONPROFIT SUMMIT

From Ideas to Action

Lessons Learned... Stories from First-Time EDs

10:00am– 11:15am

Facilitator: Frederick W. Thieman, The Buhl Foundation

Speakers: Todd Owens, NonprofitTalent

Lisa Scales, Greater Pittsburgh Community Food Bank

Steven Sokol, World Affairs Council of Pittsburgh

Michelle McMurray, Mental Health America Allegheny County

2013 Nonprofit Summit



Results of 2012 National Survey of 229 First Time Nonprofit Executive Directors

We Share Your World.

Who wouldn't want to be an E.D.?

“ The breadth of responsibility all on one person's shoulders... without the mentorship and the support to know what mistakes you might be making, I mean, the liability is so huge I wouldn't want it unless I really had help.”

Ready to Lead, 2008, CompassPoint

Overview

- Research Relevance/Context
- Methodology/Limitations
- Respondent Pool
- Findings
- Panel Response & Questions

Research Relevance/Context

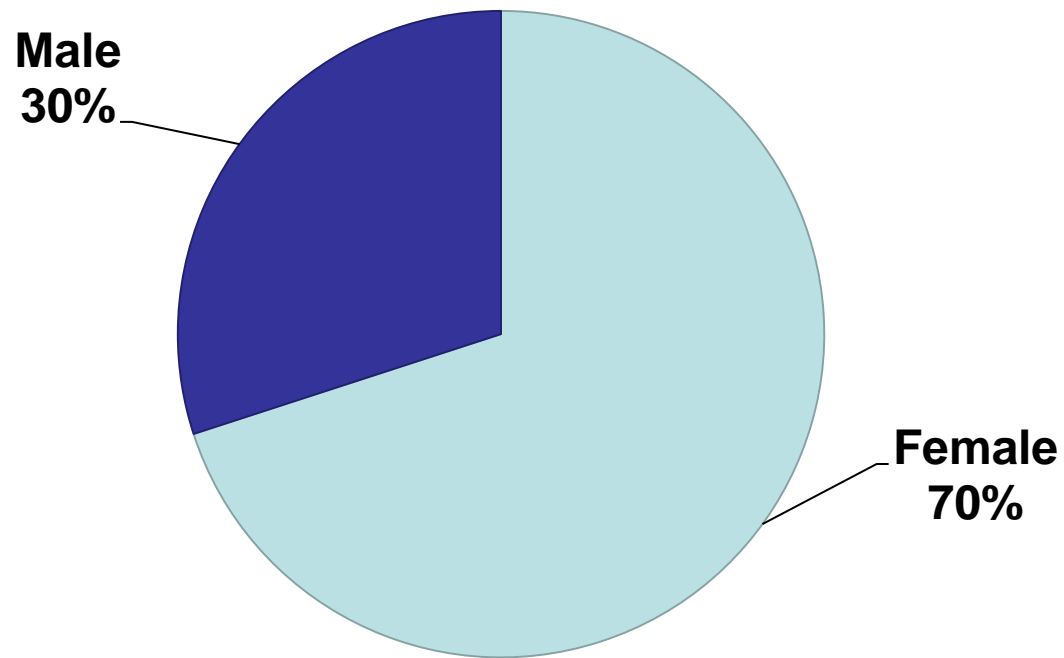
- Why this research, why now?
- Aging leaders in the sector
- Daring to Lead – ‘01, ‘06, ‘11
- Ready to Lead? – ‘08
- Table for Two – founder transitions
- Bridgespan coined term – “Bridgers”
- Vantagen’s work with leadership succession and executive recruitment

Methodology/Limitations

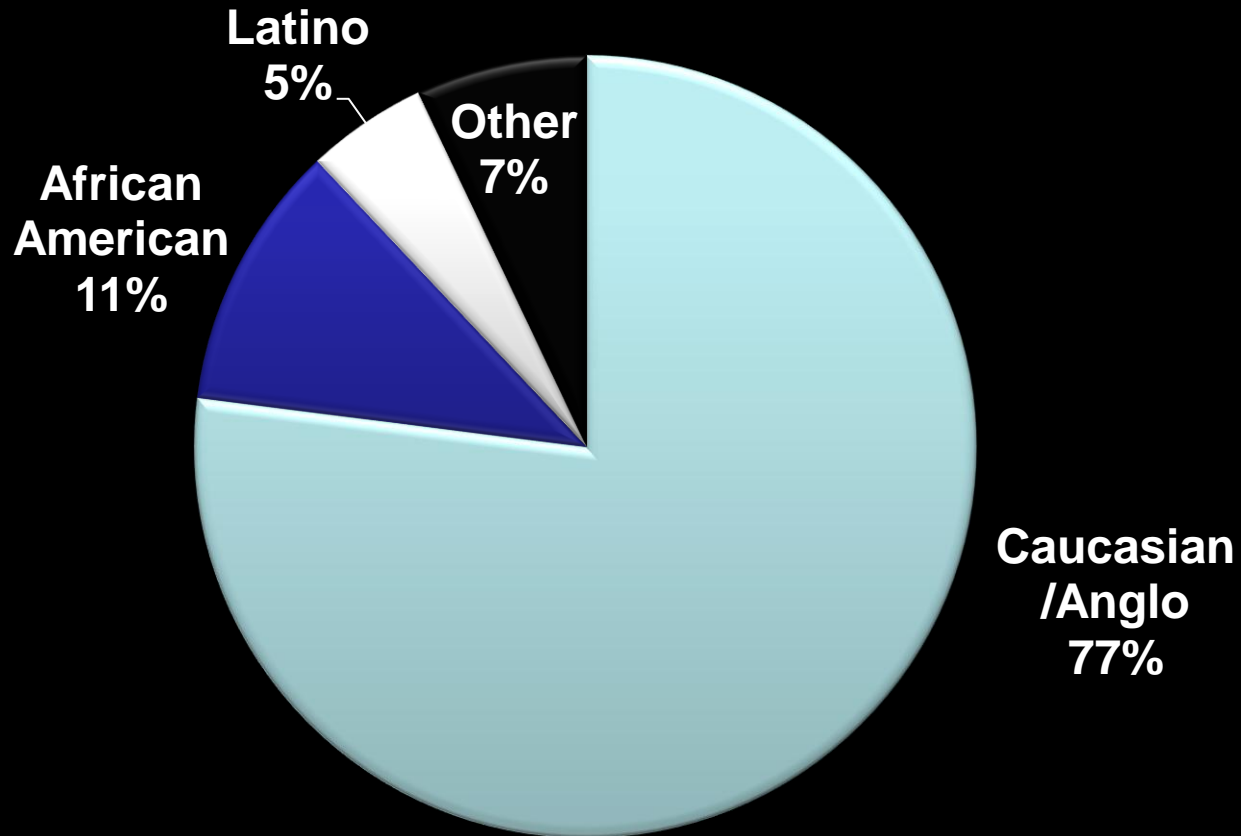
- Developed national advisory board
- Drafted survey with Coro Fellow
- Finalized survey with advisory board
- Identified national networks – Coro, Public Allies, City Year, Echoing Green, United Way, MSO's/Statewide Associations, TFA
- Limitations – pool lacks some diversity
 - Unaffiliated individuals
 - Smaller, grassroots organizations

Demographics

Gender

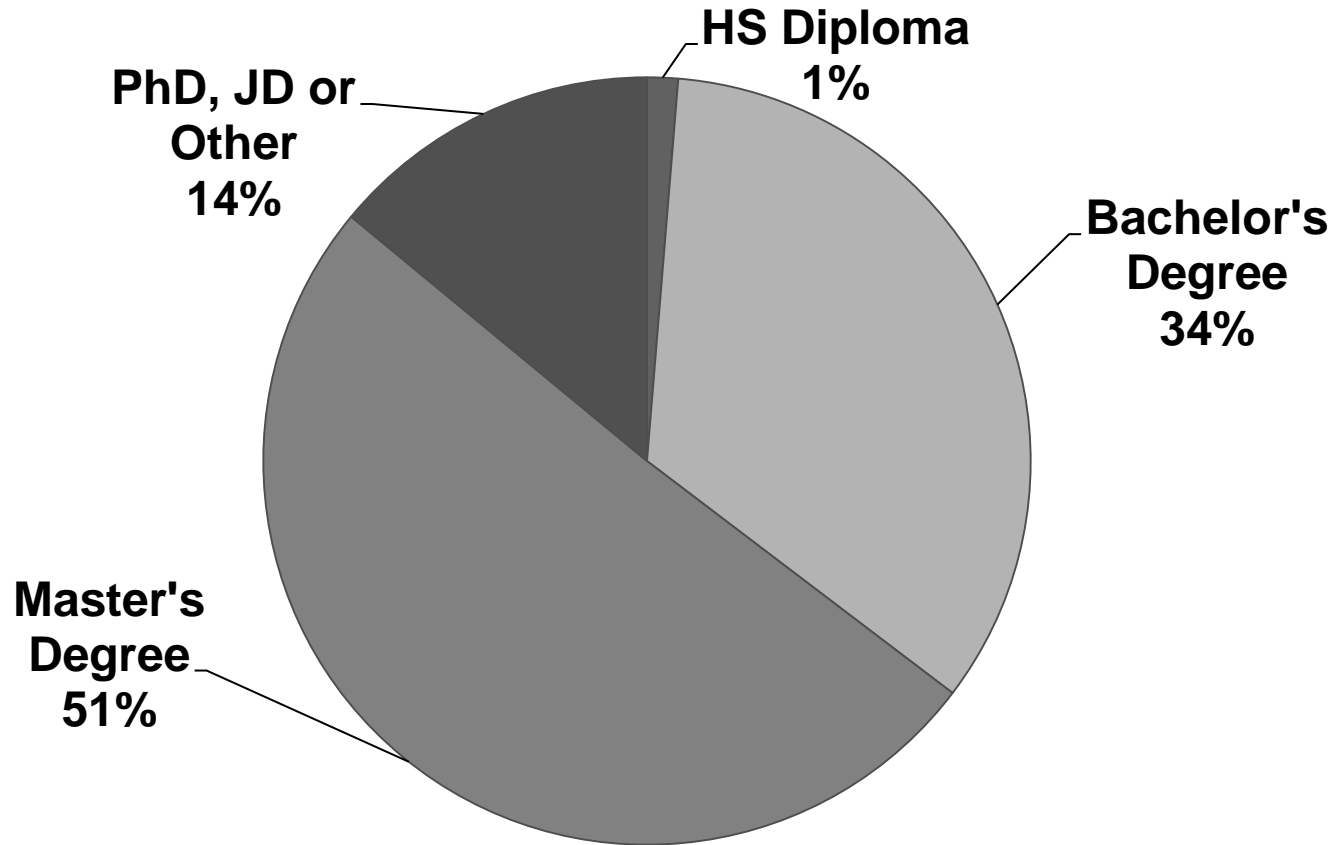


Demographics – Race/Ethnicity

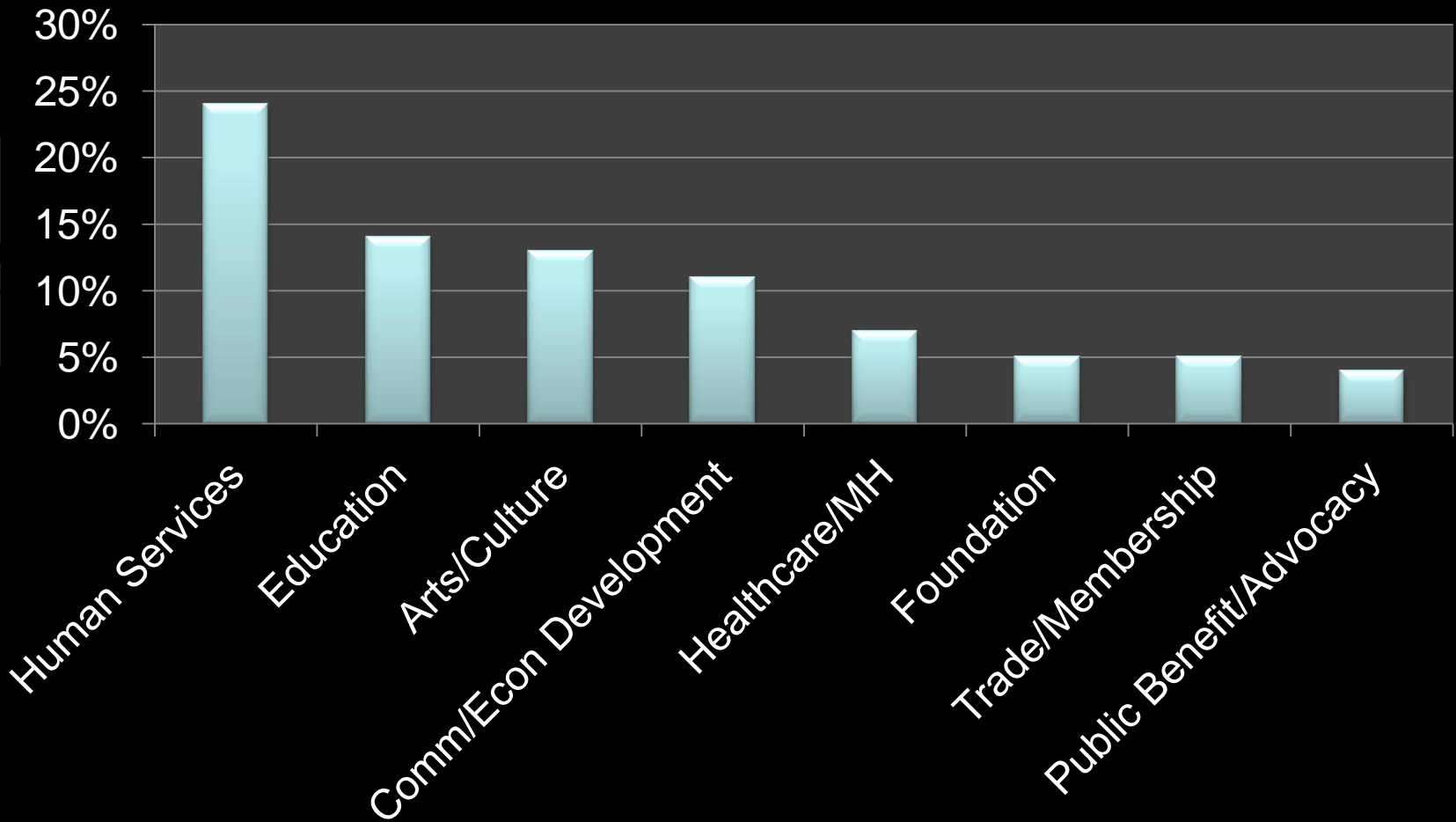


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Demographics – Education Level

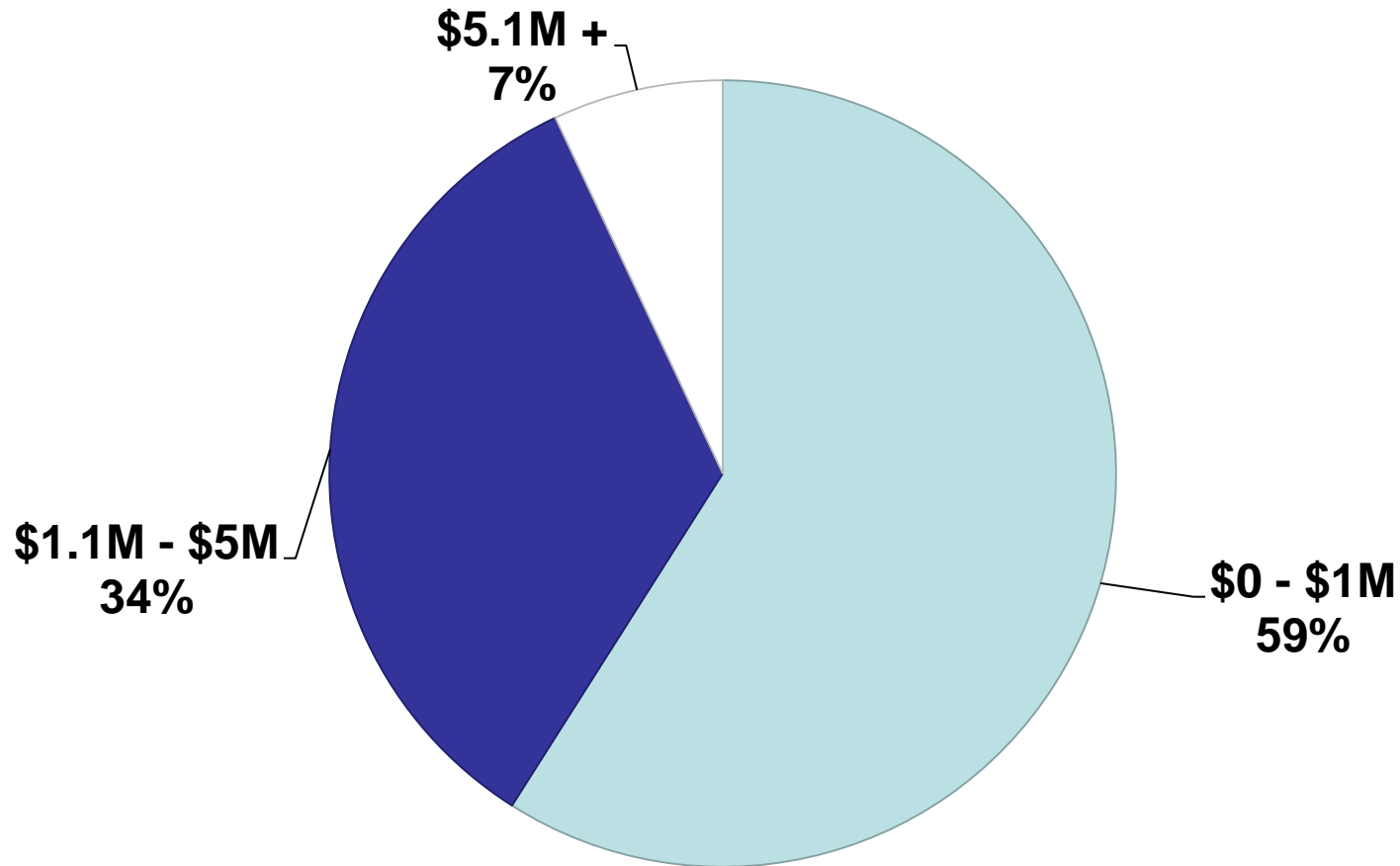


Demographics – Mission/Programs

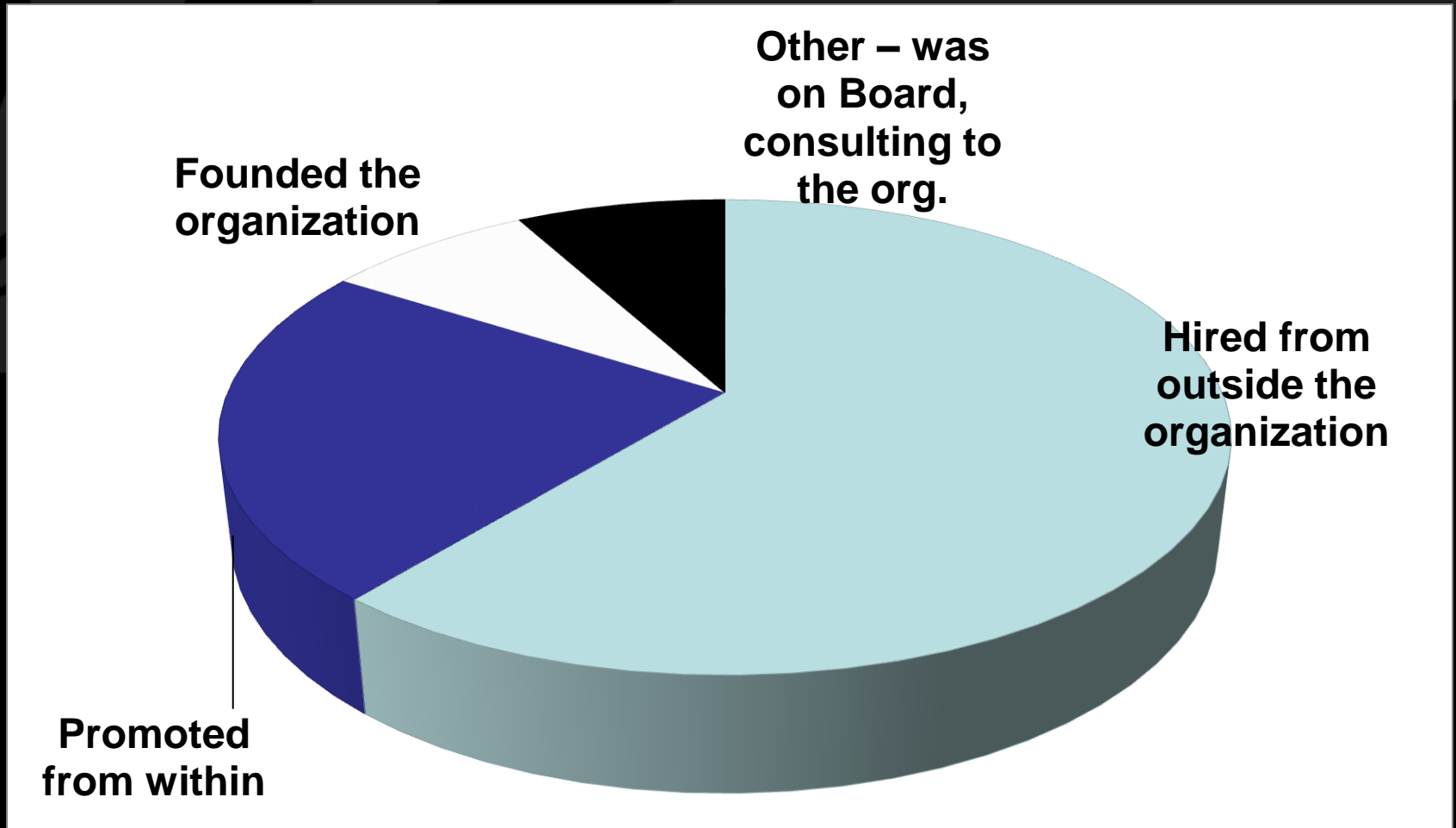


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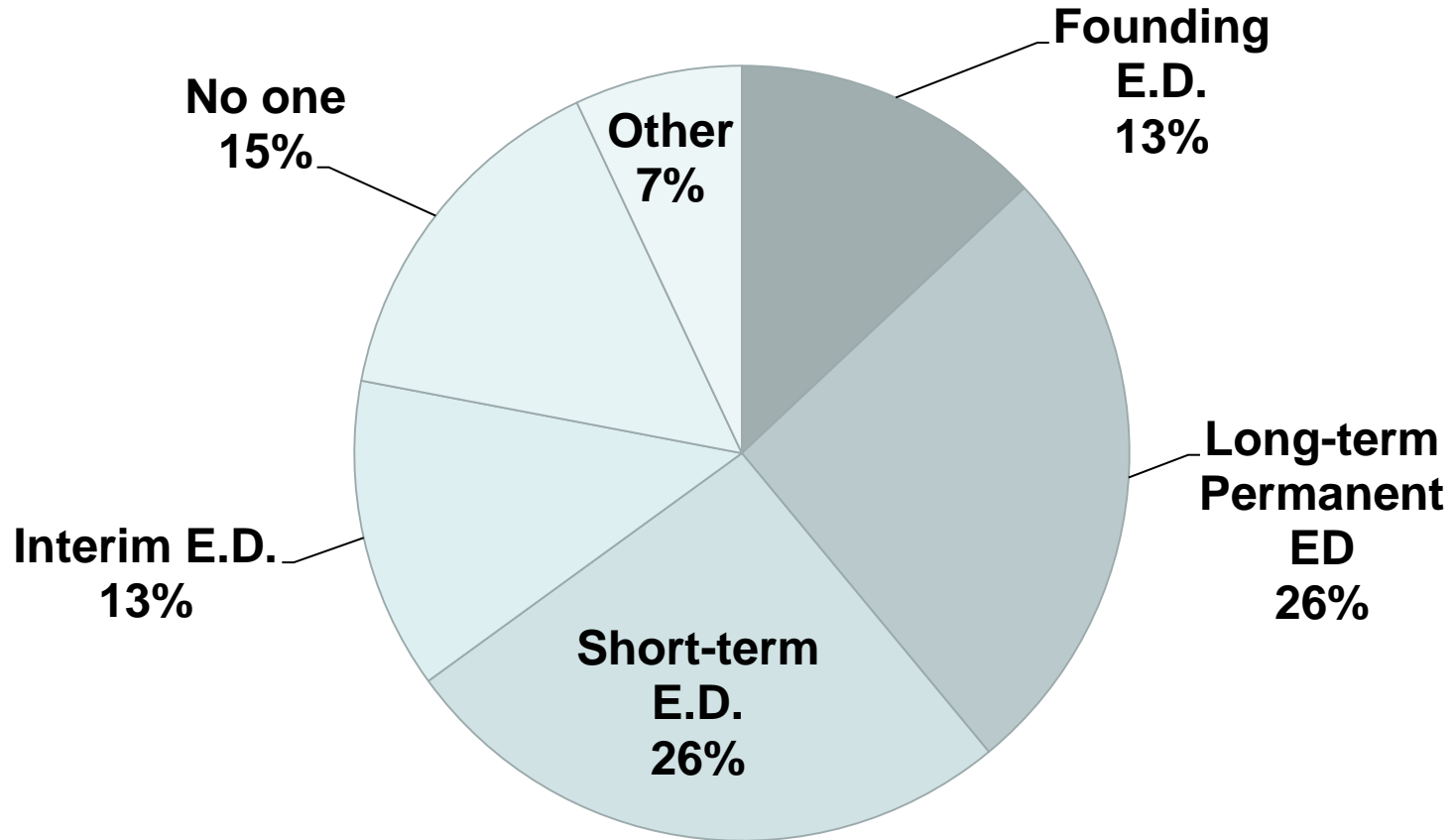
Demographics – Size/Budget



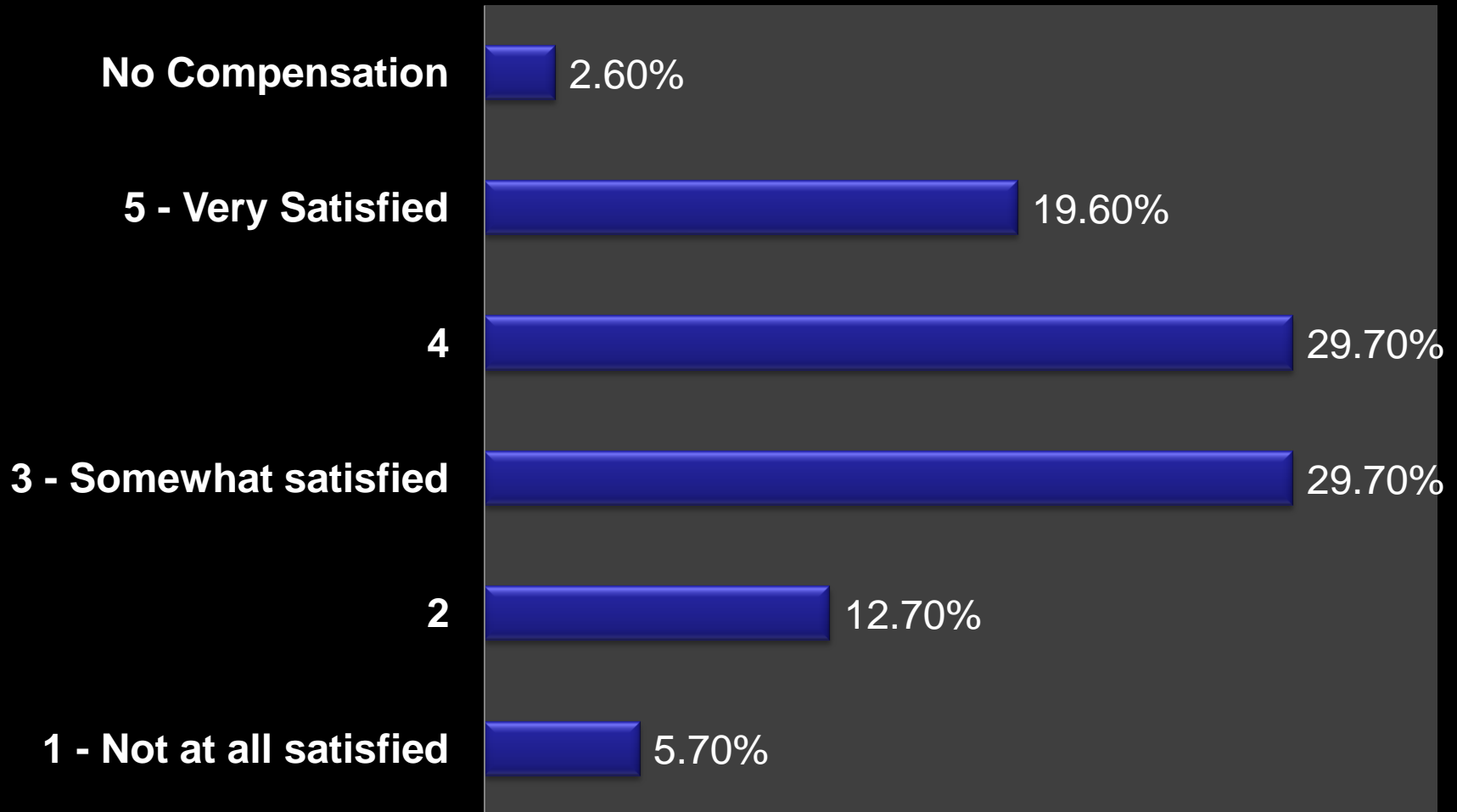
How did you become the ED?



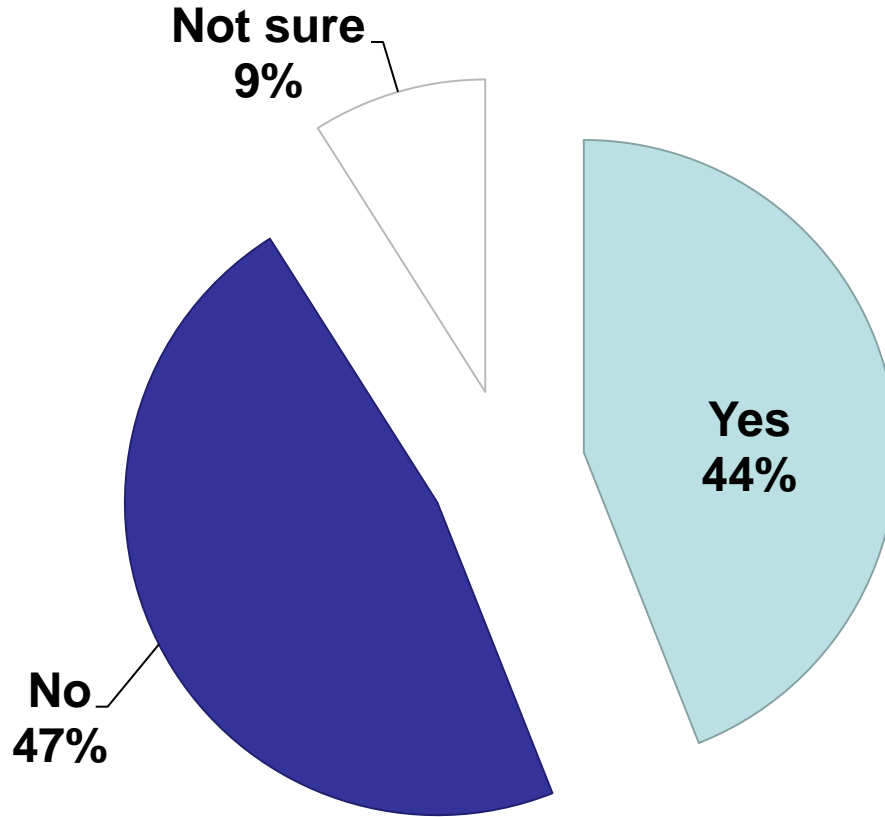
Who did you replace?



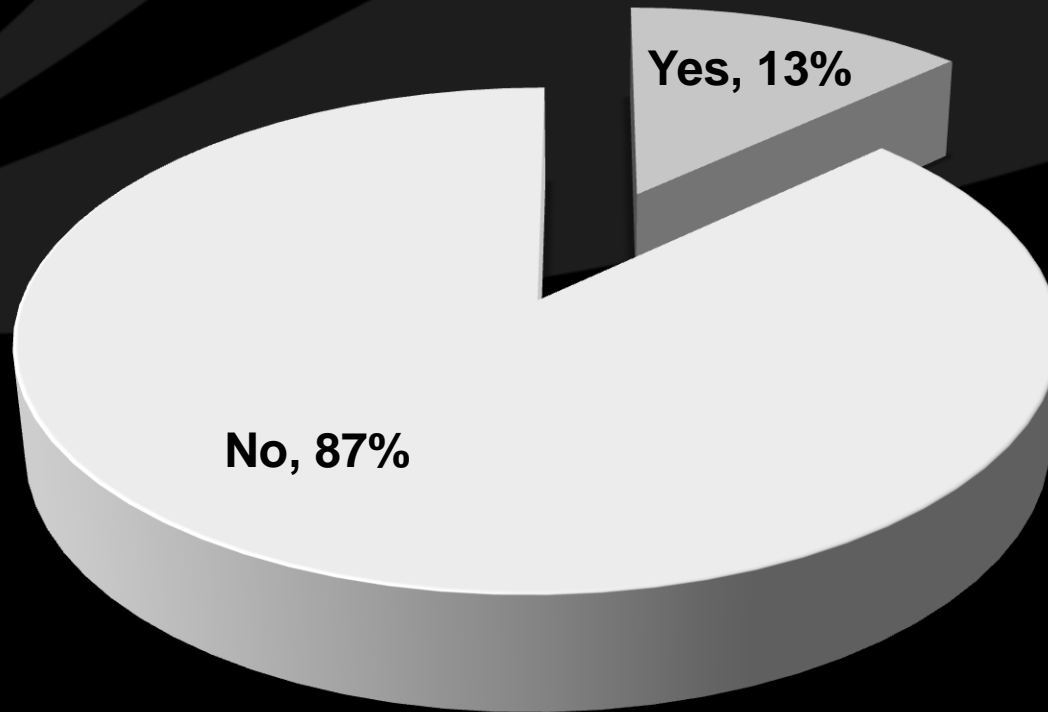
Satisfied with total compensation?



Do you have work/life balance?



Do you have a succession plan?

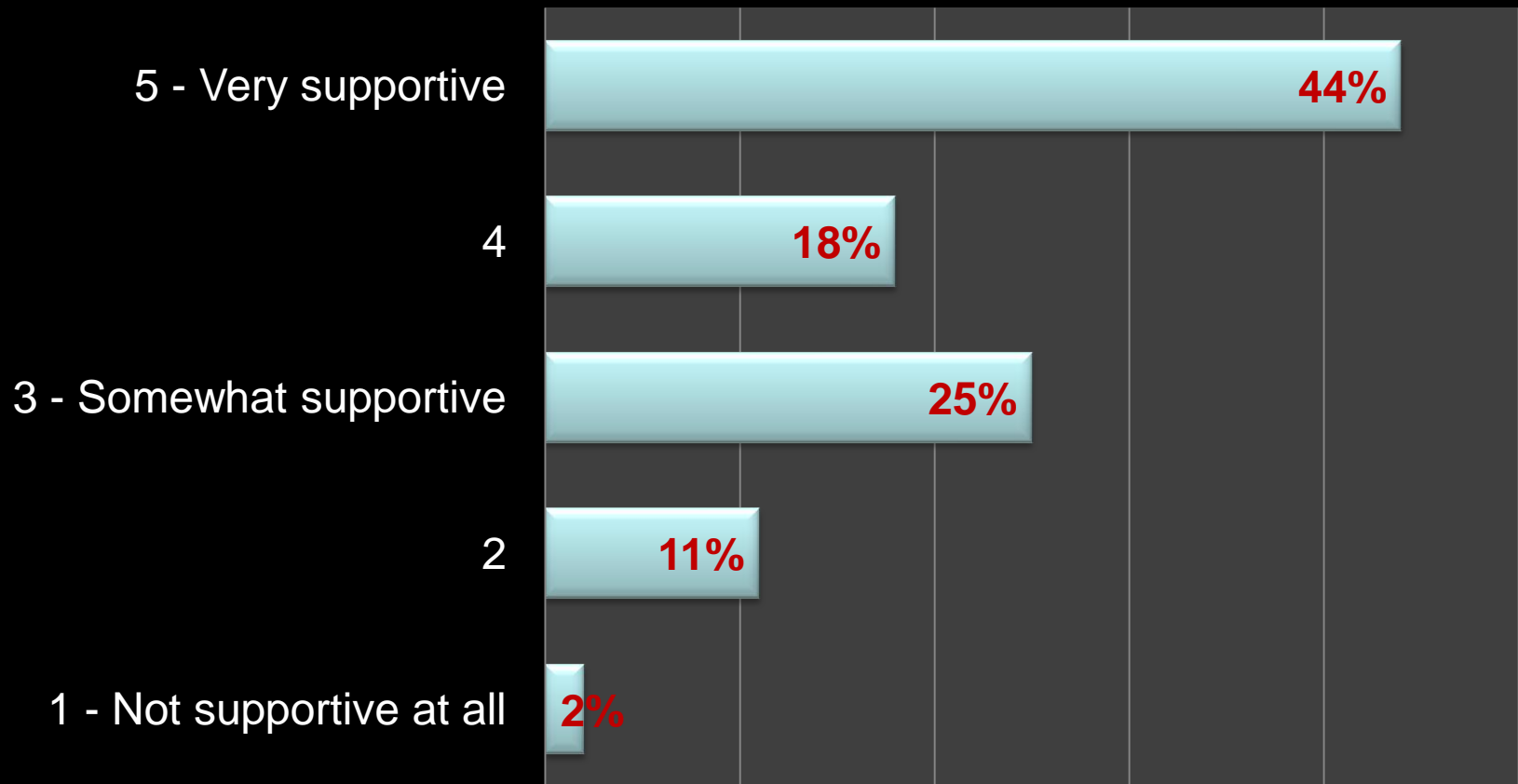


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The case for succession planning

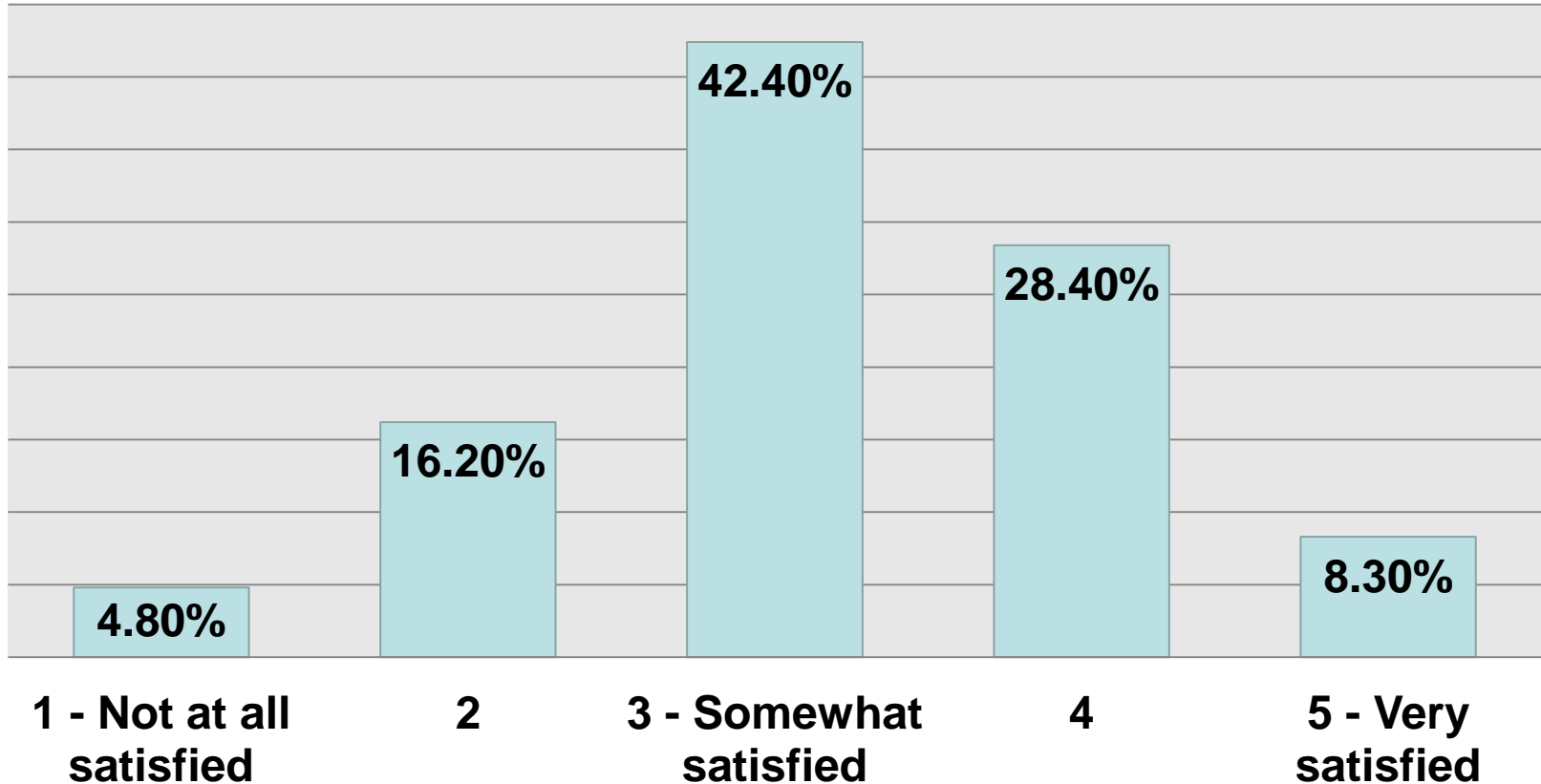
- The 13% with succession plans reported (when compared to those without):
 - Better work/life balance
 - 2X as many hired/promoted internally
 - Higher satisfaction with board performance
 - High % of positive interaction and involvement with predecessor during transition
 - Greater organizational understanding (finances, etc.) when stepping into new role

Level of support you've received from your board since hired

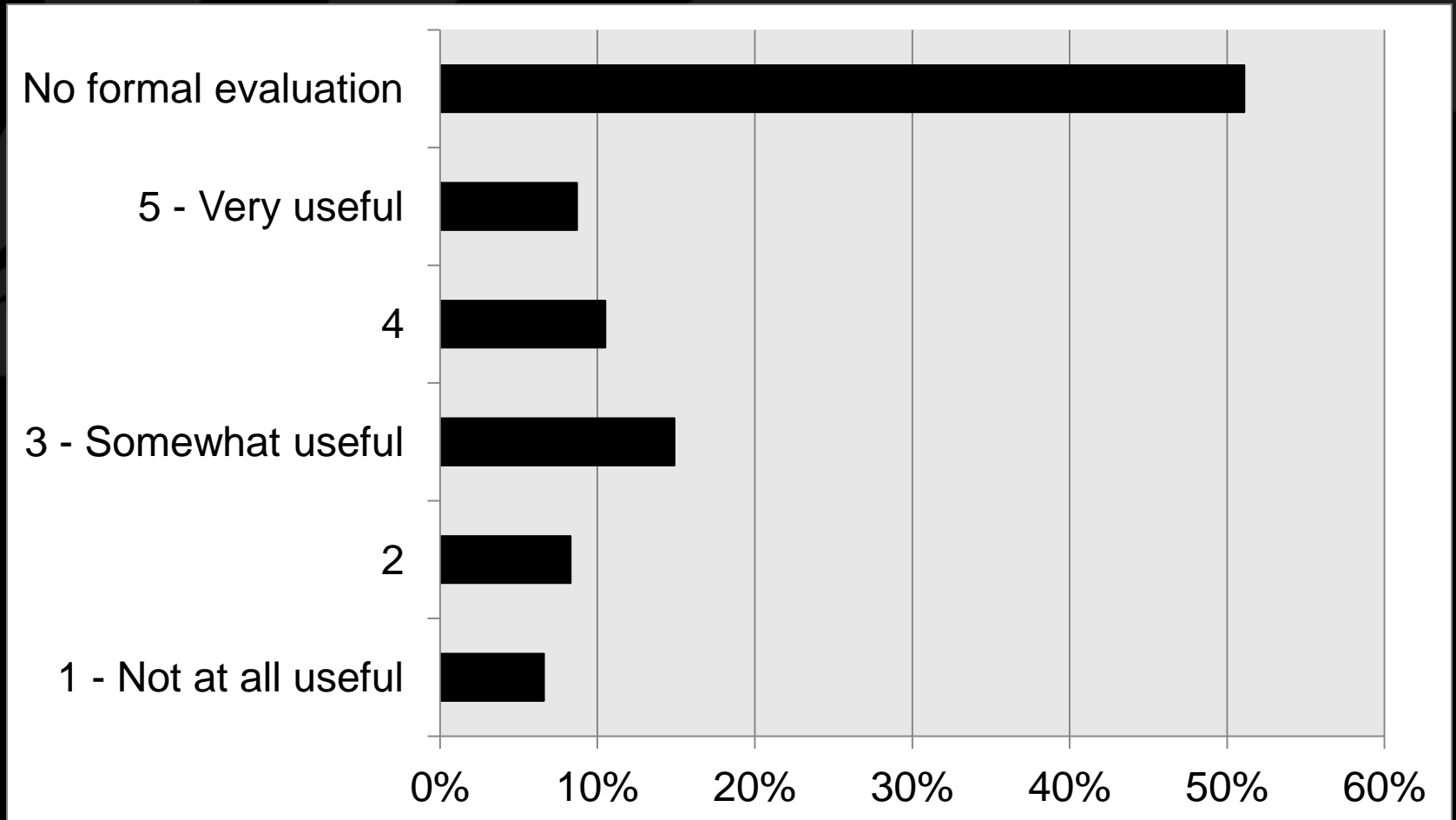


Bored of Directors?

Satisfied with your Board's performance?



Performance evaluation this year?



ED's Self Reported Strengths

- Organizational strategy/vision – 55.9%
- Networking/external rel's/partnerships – 55%
- Leading/managing staff – 31.4%
- General problem solving – 25.8%
- Fundraising – 25.8%
- Working with the board of directors – 25.8%

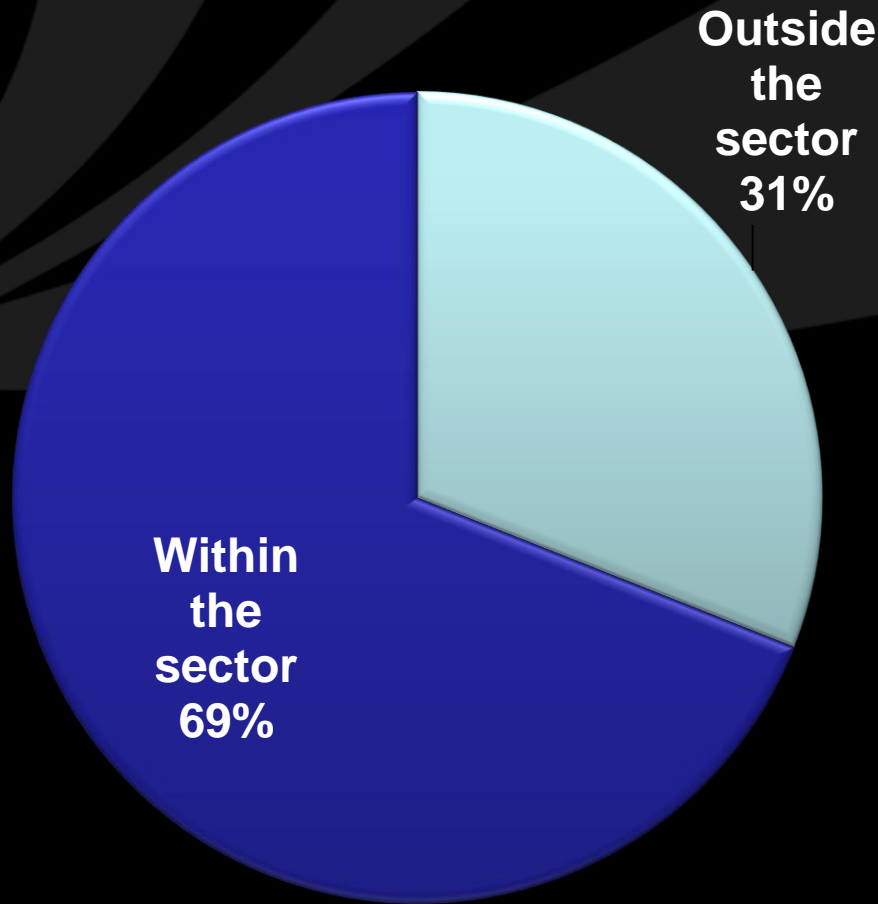
ED's Self Reported Needs

- Fundraising – 50.2%
- Financial planning – 38%
- Marketing/communications/public relations – 32.3%
- Working with the board of directors – 30.6%

Professional Development

- Effective Support
 - Peer groups and networks - 74.2%
 - Topical workshops and conferences – 47.9%
 - Mentorship – 43.7%
- Ineffective Support
 - Behavioral assessments – 31.4%
 - Membership in professional associations – 31.4%
 - Topical workshops and conferences – 28.6%

61% of respondents were hired from outside the agency



•31% of those came from private or gov't sector:

- More involvement as board member or volunteer before being hired
- Only category more male than female
- Financial planning is a weakness
- Mktg/comm's and external relations strengths

Time well spent?

Functional Areas	Time Currently Spent	Satisfaction with time allotment
Networking/external relationships/partnership building – <i>most time spent, but need more</i>	4.45	2.50
General problem solving – <i>2nd most time spent, want to do MUCH less of this</i>	4.43	3.51
Fundraising – <i>need to do more of this</i>	4.18	2.39
Working with the Board of Directors	4.13	2.74
Organizational strategy/vision	4.11	2.50
Leading and managing staff	3.99	3.08
Financial planning/budget development	3.98	2.95
Marketing/communications/public relations	3.82	2.82
Financial management	3.69	3.18
Program management	3.55	3.42
Hiring/developing staff	3.11	2.97
Public policy/advocacy – <i>least time spent, need MUCH more</i>	2.82	2.33

First Timers vs. Daring to Lead (2011)

Our respondents reported:

- **Peer learning** more valued and effective
- **Executive coaching** more prominent for professional development
- **Less work/life balance**
- Same level of **job happiness/satisfaction**
- Board governance/performance metrics worse – **fewer ED evaluations** and less board satisfaction

So What?

- CEO turnover (particularly founders) will continue as economy improves
- First time CEO's turning to informal peer networks for valuable learning
- Moving out to move up
- New leaders from outside of the organization will continue as boards seek new solutions to operational challenges
- Plan for your future – succession planning leads to healthy organizations



Thank you for your time and interest!

Todd Owens

412.315.6341

todd.owens@vantagenllc.com

**Executive Transition Management and
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