

# CEO Succession Planning Survey Results and Feedback-Community 2023

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## Purpose

After 30 years with Integral Care, David Evans is transitioning his role as CEO to the next generation of leadership. Based on Integral Care policies, the Board of Trustees leads CEO succession planning efforts. These planning efforts include administering surveys that allow people to provide input into the qualities, strengths, and values they would like to see in the new CEO. This report, produced by Molly Krietsch with Integral Care, provides feedback from survey results to use when conducting the search for Integral Care's next CEO. This report will be reviewed by the Board of Trustees and will be incorporated into succession planning efforts.

## Method

On June 20th, 2023, CEO Succession Planning Surveys became available to the community, collaborators, and stakeholders including Integral Care staff and Board of Trustees. The survey remained open until July 13, 2023. Results were collected and analyzed to identify the top qualities, strengths, and values the respondents would like to see in the new CEO as well as produce common themes seen throughout the survey. This report concentrates on one of four identical surveys distributed. Surveys were categorized by audience: Integral Care staff, community, Board members, and PNAC, a Planning and Network Advisory Committee consisting of clients, family members, providers, and community members. This report focuses on the community survey results. There were 89 respondents. The survey consisted of four questions and allowed us to obtain quantitative and qualitative data. *(Note: The Community survey was distributed in Spanish with no responses.)*

1. When you think about the new CEO of Integral Care, what are some critical aspects for the Board of Trustees to consider?
2. What background experience is important for the new CEO of Integral Care? Check all that apply.
3. What character traits are important for the new CEO of Integral Care? Check all that apply.
4. What role do you see the new CEO playing in the community?

## Summary

One of the ways this report used the CEO Succession Planning Survey results was to focus on priority topics created from text entry data and compare them with the highest scoring items on background experience and important traits. Eighty-nine (89) community members responded to the survey. Seventy-six (76) percent of community members provided comments on what they felt were some critical aspects for the Board of Trustees to consider and 65% commented on what role they see the new CEO playing in the community.

The biggest finding was that the community feels a background in mental health and substance use disorder is the most important thing to look for when finding a CEO. It is not only the most desired background experience but is also mentioned frequently throughout the survey. Comparing a mental health background with the three least desired background experiences showed that community respondents care more about having experience with Integral Care's mission and less about experience with a leadership role in county/state/governmental organizations. Community respondents feel it is more important to collaborate with the healthcare system than have had experience working in it. This makes sense when you look at the theme of having a mental health background as being the most important thing to consider when selecting a CEO. Knowledge and experience were the most discussed topic when asking what some critical aspects to consider were. Out of this topic many of those commenters felt that an extensive background in mental health is the most important thing.

The comments made regarding the desired role the new CEO should play were similar to the comments made regarding critical aspects to consider. Accountability is the most desired trait for the CEO to have while accepting was an important character trait to only 41% of survey respondents. Accountability and collaboration had the biggest correlation with the desired role of the CEO, background trait choices, and critical aspects. Every time collaboration was discussed a background in mental health was discussed as well.

Other overall themes seen throughout were compassion and advocacy, strong leadership, and a robust level of collaboration. Community respondents mentioned collaboration and innovation the most out of the four surveys. Both collaborating with healthcare providers and with local governments and leaders were in the top five desired background experiences.

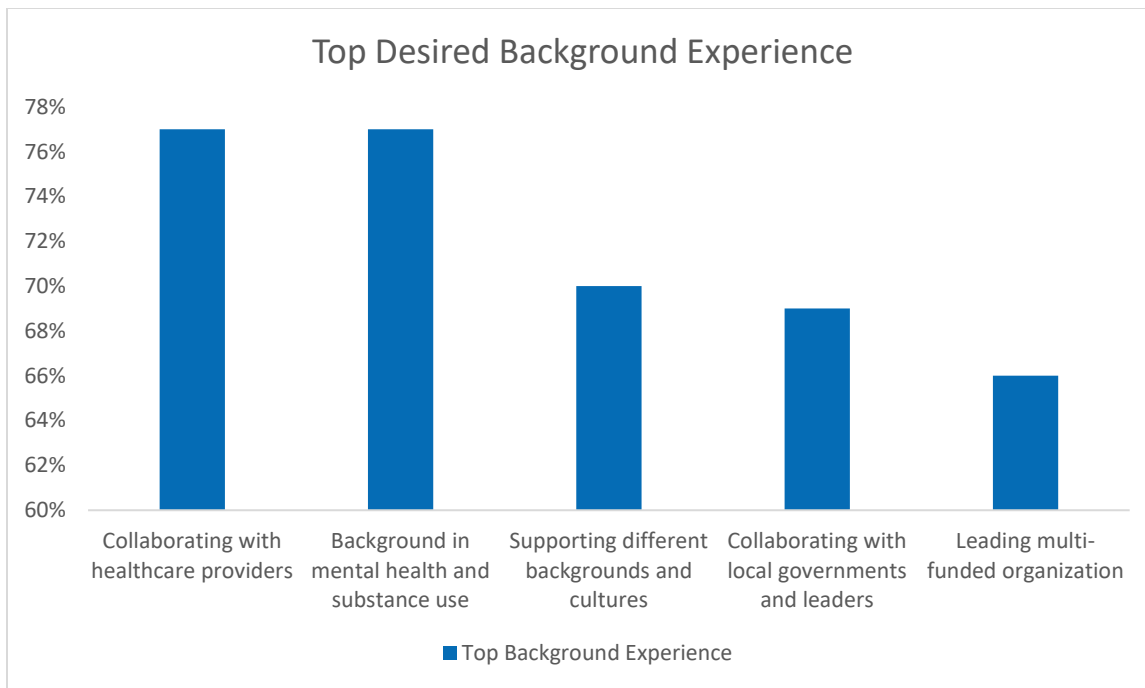
Overall, the community survey results suggest having a background in mental health, substance use disorder, homelessness, housing, and intellectual and developmental disabilities is by far the most important background experience to have, and accountability should be a highly sought out trait. A critical aspect to consider is having a complete understanding of mental health and the community served. A good way to ensure that is happening is by seeking out an excellent collaborator. Possessing a personality that has compassion, empathy, and advocacy means the new CEO truly understands and cares about Integral Care’s vision of “Healthy Living for Everyone” and is considered the most vital role for a CEO to play in the community. Findings from this community survey reflect this sentiment.

## **Background Experience**

The CEO Succession Planning Survey sought to find what background experience is most important to the community. This section uses data pulled from the background experience question, which had respondents check up to 22 boxes depending on what they felt was important. The free text survey questions have been split into main topics/themes. If the respondent mentioned experience in any way, it will be included in this section.

Eighty-nine (89) community respondents answered the experience question. Seventy-seven (77) percent of community respondents would prefer that the new CEO have experience in collaborating with healthcare providers and a background in mental health and substance use disorder. Having a background in mental health and substance use disorder was in the top five desired background experience of all four survey audiences.

Experience developing relationships with and collaborations between community leaders and local governments and leading multi-funded organizations were in the top desired areas for the community and Board respondents. Every one of the community’s top five choices can be seen as a top choice in the other three surveys as well.



The three lowest scoring desired background experiences can be seen in the graph below. All three experiences can be seen as the lowest in at least one other survey. Out of 89 community member responses, only 35% felt experience with a leadership role in county, state, or national initiatives and leading a governmental organization was important, while only 30% believed working in Austin/Travis County healthcare system was important. These three lowest scoring experiences were the same three lowest experiences in the staff survey as well.

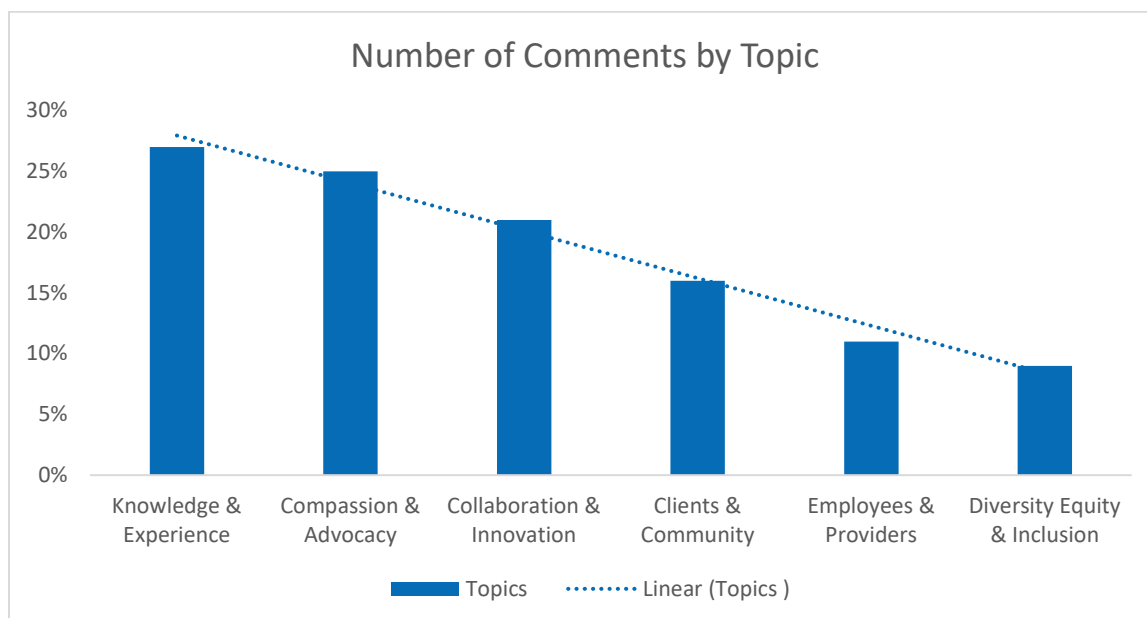


Thirty-five (35) percent of community respondents mentioned knowledge and experience when asked the question, “When you think about the new CEO of Integral Care, what are some critical aspects for the Board of Trustees to consider?” Of the 35% that mentioned experience, most of the content was regarding experience in mental/behavioral health, which is also the highest desired background experience in all surveys. Common themes for this question will be discussed in the next section.

## Critical Aspects for the Board of Trustees to Consider

The CEO Succession Planning Survey provided community members with an opportunity to give input in their own words. One of the text entry questions is, “When you think about the new CEO of Integral Care, what are some critical aspects for the Board of Trustees to consider?” Using a survey platform, this qualitative data has been manually sorted into six topics. The comments were analyzed using data from all audiences: Board members, community members, PNAC members, and staff members. The comments were then sorted by audience and determined by common descriptions seen across all community comments. The topics are Clients & Community, Collaboration & Innovation, Compassion & Advocacy, Diversity Equity & Inclusion, Employees & Providers, and Knowledge & Experience.

The community audience had a total of 68 comments, which is 76% of the audience. Knowledge & Experience was mentioned the most. Clients & Community and the Employees & Providers topics are only counted if the comment doesn’t mention one the other four topics. For example, a respondent could mention that compassion and advocacy for our clients and community are important aspects to consider. Since clients and community were mentioned when discussing compassion and advocacy, it will only be counted under compassion and advocacy.



## **Knowledge & Experience**

Knowledge and experience saw the greatest number of mentions in the community survey. Almost every comment stated the specific experience they are looking for in a CEO is having an extensive knowledge and background with mental and behavioral health, substance use disorder, homelessness, and intellectual and developmental disabilities. Community respondents showed more concern for the CEO having experience with all aspects of the mission of Integral Care and less concern with the CEO having leadership experience outside of Integral Care's unique setting. This can also be seen when you look at the most and least desired background experiences. The staff audience sentiment was the same, however the community's comments tended to discuss Integral Care's role in the community more. Community members mentioned wanting a CEO to not only have background in mental health but knowledge of a local mental health authority. There were a few commenters who mentioned good public speaking as a critical trait as well.

## **Compassion & Advocacy**

Compassion and advocacy were the second highest mentioned topic, totaling 25%. All respondents that mentioned compassion and advocacy believe that the CEO for Integral Care should be an ambassador and advocate for mental health and substance use services. Commenters mentioned being compassionate about the organization and its mission as well as believing in compassionate care. Although only 25% of the community mentioned compassion and advocacy, it is a running theme throughout the survey and can be seen mentioned in other questions. Advocacy is ranked high on the character traits question. Lastly, multiple comments that mentioned compassion or advocacy used the word empathy to describe what critical aspect the Board of Trustees should consider.

## **Collaboration & Innovation**

Twenty-one (21) percent of community members who answered this question mentioned collaboration and innovation. Comments that include collaboration and innovation have a subcategory if they also mentioned the importance of a union. Across all comments in all surveys that mentioned collaboration, 16% of the audience mentioned hoping the new CEO was pro-union. Five (5) percent mentioned it in this community survey and three mentioned being union-allied in the background question under 'other.' Community respondents would like the new CEO to be a person who takes action and builds relationships by engaging in the community. They would like a CEO who is capable of implementing recommendations, promoting an integrated system of care, and supporting growth of services by collaborating with other organizations and partners. Collaborating with healthcare providers can be seen as the highest desired background trait tied with background in mental health. This, along with the collaboration and innovation topic from the critical aspect question, and the desired role for CEO data, is very important to the community.

## **Clients & Community and Employees & Providers**

Sixteen (16) percent of community respondents that answered this question mentioned something regarding clients and community. Awareness of the complex role that the agency plays in the community and actively listening to the community were the most mentioned themes in this topic. Specific comments were made regarding clients such as continuing support groups and classes, helping LGBTQIA+ populations, and improving the follow up with clients. Eleven (11) percent of community respondents mentioned employees and providers. Comments that include mention of employees or providers have a subcategory if they also mentioned salaries or funding. Across all surveys, 34% of the employees or providers topic mentioned something regarding salary. Thirty (30) percent of community respondents that mentioned employees and providers also mentioned salary as a critical aspect to consider with a general statement being to increase funding for staff and services. Improving employee engagement, respect for mental health professionals, ability to motivate staff, and understanding the basic needs of employees are some common themes from the mentions of employees or providers.



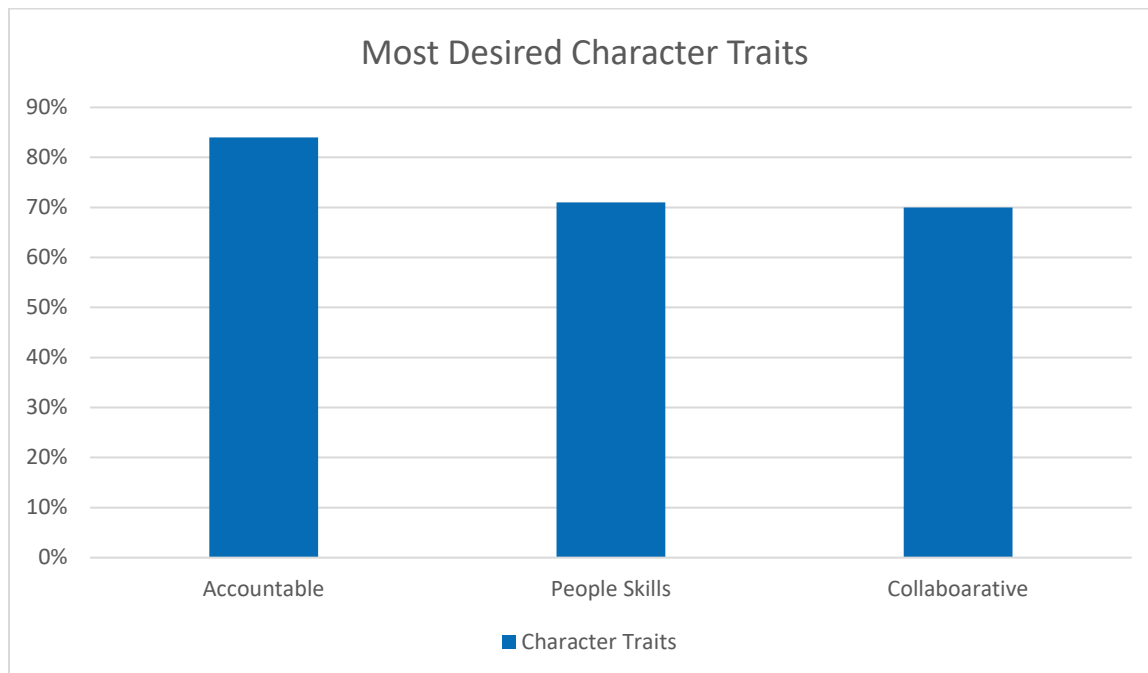
## Diversity Equity & inclusion

Nine (9) percent of community respondents that answered this question mentioned something regarding diversity equity and inclusion. All stated wanting a CEO that is committed to shifting the culture at Integral Care to be in line with the strategic plan that is centered around DEIB. Community respondents want the CEO to ensure that equity and equality are always practiced.

## Important Character Traits

The CEO Succession Planning Survey sought to identify the most desired character traits for a CEO. This section uses data pulled from the character traits question on the CEO survey, which had respondents check up to 41 boxes depending on what they felt were important.

The most desired character traits for the community respondents are accountability, collaboration, and people skills, with accountability being the highest at 84%. Accountability and collaboration are the most desired traits across all survey audiences. People skills made the top desired character traits in the community and Board surveys.



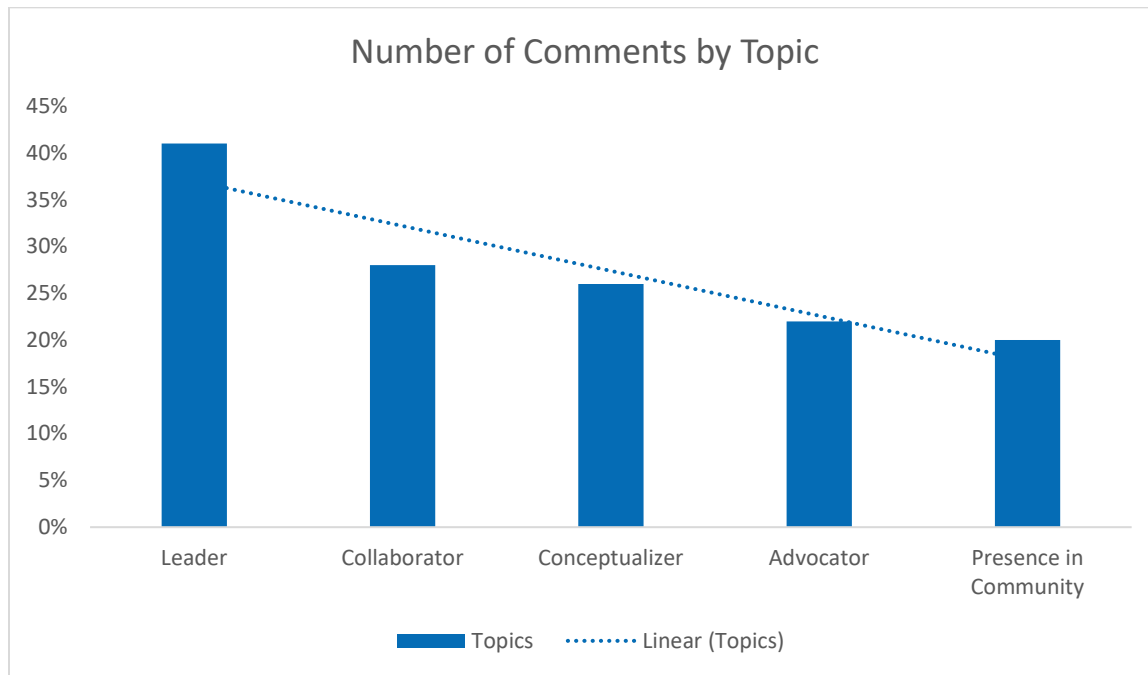
The least desired character traits were determined by pulling the five traits that were selected the least number of times. Of the five traits, economic justice awareness was also one of the lowest scoring traits in the PNAC audience. The remaining four traits mimicked what the Board audience survey had as their lowest traits. However, due to audience size in the Board survey, a correlation cannot be established. Accepting was the trait checked off the least number of times, making it the least desired trait for the community at 41%.



## Desired Role for CEO in the Community

The CEO Succession Planning Survey provided community members with an opportunity to give input in their own words. The second text entry question is, “What role do you see the new CEO playing in the community?” Using a survey platform, this qualitative data had been manually sorted into five topics. The comments were analyzed using data from all audiences: Board members, community members, PNAC members, and staff members. The comments were then sorted by audience and determined by common descriptions seen across all community comments. The topics are Advocator, Collaborator, Presence in Community, Leader, and Conceptualizer.

Eighty-five (85) percent of the community respondents answered the desired role question. Presence in community received the lowest mentions and most community commenters mentioned more than one topic.



## **Leadership**

Forty-one (41) percent of community respondents who answered the desired role trait discussed the qualities of a leader. To community respondents, a good leader is one who is a visionary and is authentic and accountable. They feel a good leader is one who works across the spectrum of Integral Care and its collaborators and is genuine in rallying for clients' rights. Leadership was the most discussed topic for the community survey with the consensus being there should be a strong leader who can strengthen Integral Care's place in the community. The community sees a leader as being a spokesperson and one who can promote understanding and empathy beyond that of Integral Care.

## **Collaborator**

All commenters mentioned collaboration with community members and organizations as being an important role for the CEO. A common theme throughout is versatility. Community members believe the new CEO must adapt to what is happening in the community, build and rebuild relationships with key partners, and reestablish trust to leverage resources.

## **Conceptualizer**

Comments that discussed bringing in new ideas, understanding the big picture, and coming up with a practical implementation of an idea were sorted into the conceptualizer topic. Commenters described the ideal CEO as someone who can transform the current system – someone who is innovative with an ability to understand the community's needs to identify the steps required to make real change, and a clear vision of moving into the future. Conceptualizers are known for being intensely practical, but most staff commenters discussed this role along with themes of compassion and empathy. Due to Integral Care's unique and diverse population it goes without saying that having a background in mental health and being an advocator need to be traits that go along with the conceptualizer.

## **Advocator**

Most of the comments from the other survey audiences mentioned being an advocator for the community, but the community audience tended to discuss specific populations more. Community respondents want the CEO to be an advocator especially when it comes to people with complex behavioral health needs, people who look different, those struggling with addiction, and those deemed “too hard to deal with” as one commenter stated. The desire for the CEO to be an advocator can clearly be seen in this question as well as the background experience and critical aspect questions.

## **Presence in the Community**

Commenters mentioned the role of the CEO should be a visible one. The community for the most part agrees that what they mean by this is occasionally stepping out into the community, being present in a meaningful way, meeting the people Integral Care serves, sitting in on sessions and services, and is warm and approachable. Community members also feel that having a strong voice is important for the new CEO to have. The consensus is that the new CEO should be a spokesperson and representative of the agency in the community.