

CEO Succession Planning Survey Results and Feedback-Staff 2023

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 staff survey results. There were 157 respondents. The survey consisted of four questions and allowed us to obtain quantitative and qualitative data.

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 scored items on background experience and important traits. One hundred fifty-seven (157) staff members responded to the survey. A total of 111 staff members provided comments on what they felt were some critical aspects for the Board of Trustees to consider and 72 staff comments on what role they see the new CEO playing in the community.

The biggest finding was that staff feel that a background in mental health and substance use disorder is the most important thing to look for in a new 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 staff care more about having experience with Integral Care's mission and less about experience with a leadership role in county/state/governmental organizations or working in a healthcare system. Knowledge and experience were the most discussed topic when addressing critical aspects for consideration. Many commenters also felt that an extensive background in mental health is the most important thing to consider.

The staff respondents tended to discuss more specifics regarding day-to-day operations when commenting on collaboration and innovation as well as employees and providers. They tended to speak in broader terms when discussing compassion and advocacy, diversity, equity and inclusion, and clients and community. Accountability is the most desired trait for the CEO to have by far while being inspirational was an important character trait to only 40% of survey respondents.

The comments made regarding the desired role the new CEO should play were similar to the comments made regarding critical aspects to consider. Overall themes seen throughout were compassion and advocacy, having a strong voice, and an understanding of vulnerable populations. Collaboration and innovation, as well as leadership and conceptualization traits, were commented on as well but mostly discussed in addition to the previous themes.

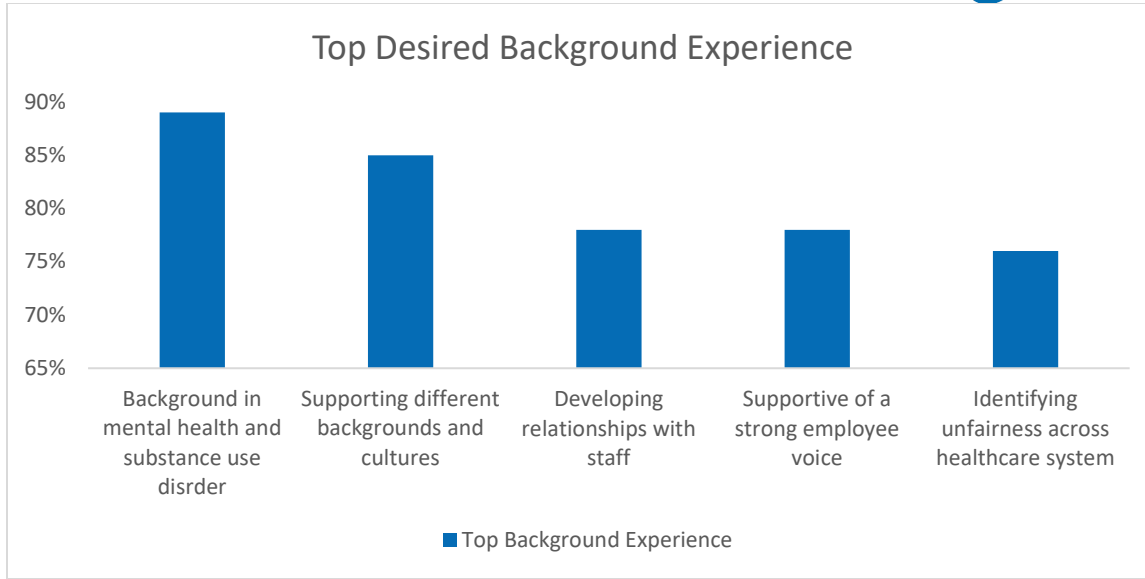
Overall, the staff survey results suggest having a background in mental health, substance use disorder, homelessness, housing, and intellectual and developmental disabilities is by far the most important background experience to have, and accountability should be a highly sought out trait. A critical aspect to consider is having a complete understanding of mental health and the community served. Possessing personality traits such as compassion, empathy, and advocacy mean 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. Staff survey results reflect this sentiment.

Background Experience

The CEO Succession Planning Survey sought to identify what background experience is most important to Integral Care staff. 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 was included in this section.

Eighty-five (85) percent of staff respondents prefer the new CEO to have experience in building and supporting a workforce with different backgrounds and cultures. Eighty-nine (89) percent of staff respondents felt collaborating with healthcare providers and having a background in mental health and substance use disorders is an important experience to have. Having a background in mental health and substance use disorder was in the top five desired background experience of all four surveys distributed.

Every one of the staff respondents’ top five experiences 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 157 staff respondents only 27% felt experience with a leadership role in county, state, or national initiatives, leading a governmental organization, and working in Austin/Travis County healthcare system was important. These three lowest scoring experiences were the same three lowest experiences in the community survey as well.

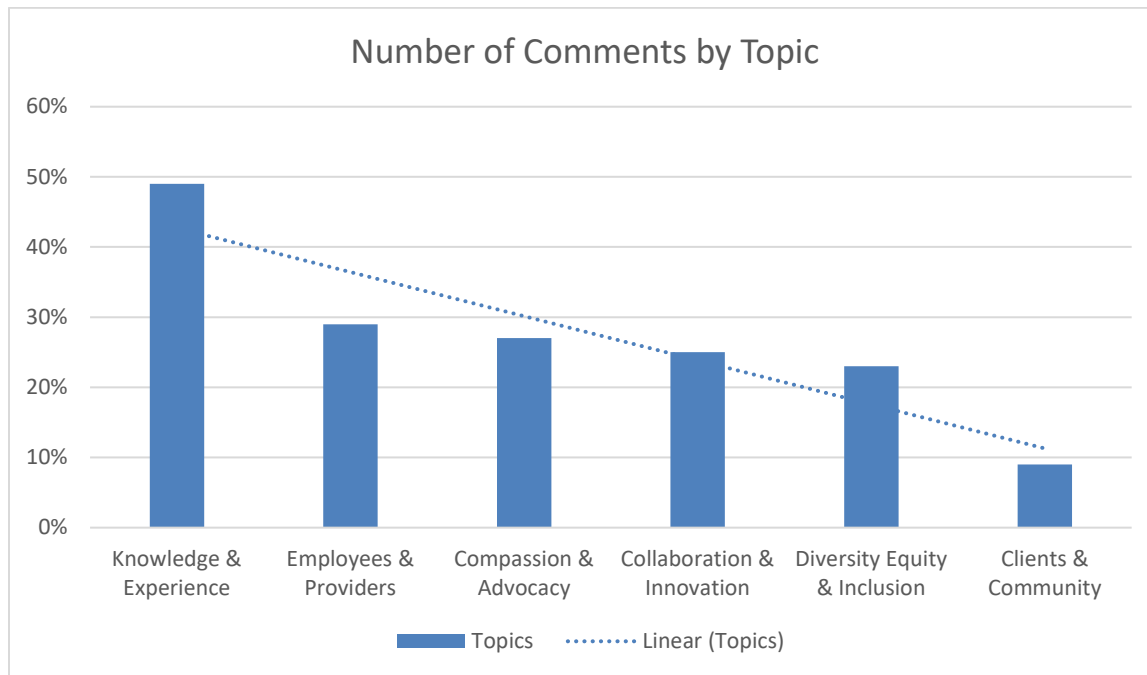


Fifty-four (54) out of 111 staff respondents mentioned knowledge and experience when asked the question, “When you think about the new CEO of Integral Care, what are some critical aspects for the Board of Trustees to consider?” Therefore, 49% of staff respondents mentioned experience being a critical aspect. Of the 54 responses mentioning experience, most of the content was regarding experience in mental/behavioral health which is also the highest desired background experience in all surveys. When choosing which background experiences staff felt were important, a background in mental health was ranked high along with supporting different cultures and identifying unfairness, both being experiences you could receive from having a background in mental health. The other two most desired background experiences for staff respondents were developing relationships with staff and supportive of a strong employee voice. Both were expected as they are staff-related experiences.

Critical Aspects for the Board of Trustees to Consider

The CEO Succession Planning Survey provided staff 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 had 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 topics were created by looking at common descriptions seen across all staff respondent comments and then were sorted by audience. The topics are Clients & Community, Collaboration & Innovation, Compassion & Advocacy, Diversity Equity & Inclusion, Employees & Providers, and Knowledge & Experience.

The staff respondent audience had a total of 111 comments with Knowledge & Experience being mentioned the most, and Clients & Community being mentioned the least. Clients & Community and the Employees & Providers topics are only considered if the comment doesn’t mention one of 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 & Community were mentioned when discussing Compassion & Advocacy, it will only be counted under Compassion & Advocacy.



Knowledge & Experience

Knowledge and experience saw the greatest number of mentions in the staff survey with a total of 54 mentions. Almost every mention stated they are looking for a CEO with an extensive knowledge and background in mental and behavioral health, substance use disorder, homelessness, and intellectual and developmental disabilities. Staff 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. The same thing can be said about the community audience, however the staff respondent’s comments tended to be more specific and on a micro-level. While staff respondents agreed that the CEO needs to understand the mental health structure in every way, they would like to see someone who is not so far removed and knows what is going on from the ground up. Comments that mentioned more detailed experiences they would like the CEO to have included direct client care, specific experience working with underserved and underrepresented populations, and a knowledge of the LMHA/LIDDA structure.

Unique to the staff respondent comments is mention of external candidates. Fifteen (15) comments mentioned a preference of wanting a CEO that is an external hire and the comments were made into a subcategory for knowledge and experience. There was no mention of external or internal candidate preference in any other comments of the four surveys.

Employees & Providers

It makes sense that employees of Integral Care would comment more on the day-to-day operations, which is why you see more employee and provider comments in the staff survey than in the others. There were 32 staff respondents who mentioned something regarding employees and providers. Comments that include mention of employees or providers have a subcategory if they also mentioned salaries or funding. Across all surveys, 15 out of 44 mentions of employees or providers also mentioned something regarding salary. There were 12 staff respondents that mentioned this as a critical aspect to consider with the general statement being that there needs to be structural shifts in funding, compensation, and staff workload. An interest in learning from staff, importance of valuing staff, supporting a positive workplace culture, clear communication, and visibility are some common themes from the employees and providers topic.

Compassion & Advocacy

Compassion and advocacy was the third highest mentioned topic with a total of 30 mentions. All staff 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. Respondents also mentioned that the CEO should be focused on improving the quality of services and helping people more than increasing metrics. Along with the quality of services being more important to staff respondents, many mentioned they want a CEO who cares about the system they are managing while acknowledging that profits aren't everything. Commenters mentioned being compassionate about the organization and its mission as well as being a champion of client rights and employees. Lastly, multiple comments that mentioned compassion or advocacy used words such as honesty, respectfulness, and empathy to describe what critical aspects the Board of Trustees should consider.

Collaboration & Innovation

There were 28 staff respondents who mentioned something regarding collaboration and innovation. Comments that include mention of collaboration and innovation have a subcategory if they also mentioned the importance of a union. Across all surveys, eight out of 49 mentions of collaboration also mentioned hoping the new CEO was pro-union. Seven (7) out of 28 mentioned it in this staff survey and six mentioned being union-allied in the background question under 'other.' Staff respondents' comments are like the community's comments in that they would like the new CEO to be a person who takes action and builds relationships by engaging in the community. Implementing recommendations, promoting an integrated system of care, and supporting growth of services by collaborating with other organizations and partners are all shared beliefs across audiences. Staff respondents also provided more specific examples of what they feel innovation looks like. They would like a CEO who is capable and willing to dismantle current healthcare and employment systems, support moving towards automated systems instead of re-working obsolete systems and has a genuine desire to create accessible healthcare for the community.

Diversity Equity & inclusion

There were 25 staff respondents who mentioned something regarding diversity, equity, inclusion, and belonging (DEIB). 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. Supporting a positive workplace culture that honors the diversity of the community Integral Care serves was a theme throughout these comments. Staff respondents want the CEO to work closely with the Chief Equity Officer and ensure that equity and equality are always practiced.

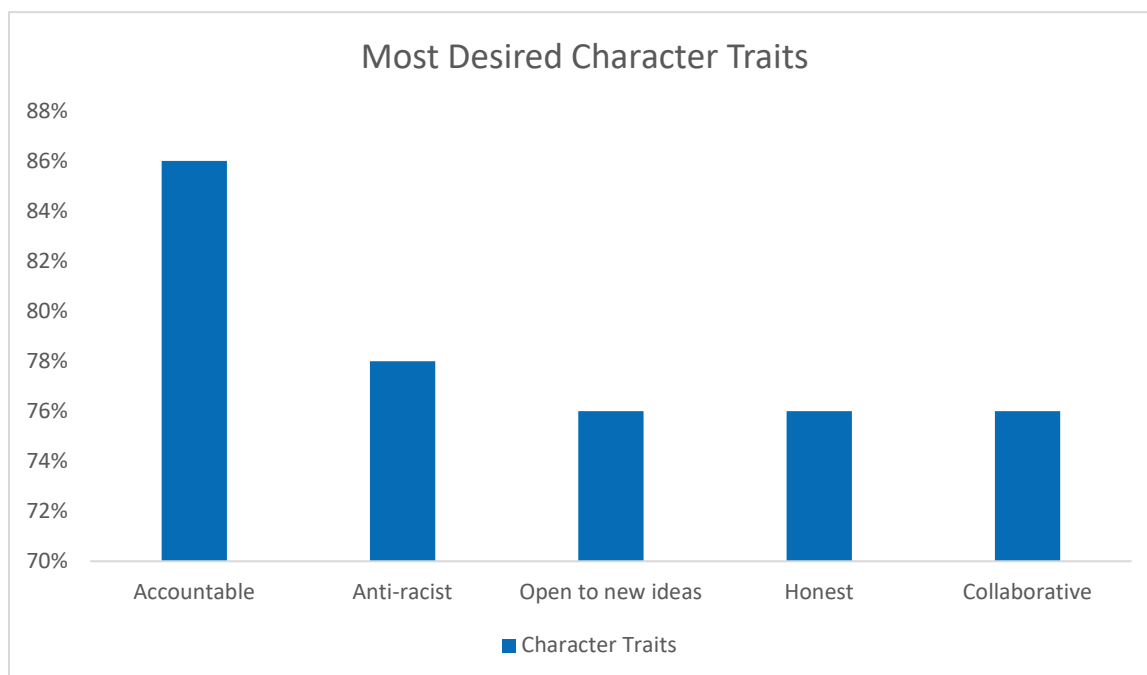
Clients & Community

There were 10 staff respondents who mentioned something regarding clients and community that did not fall under one of the other four topics. Awareness of the complex role that the agency plays in the community, understanding the barriers clients face and building a future system of care that works best for our community were some of the most mentioned themes in this topic. A few respondents mentioned they would prefer someone who has lived in Austin for quite some time.

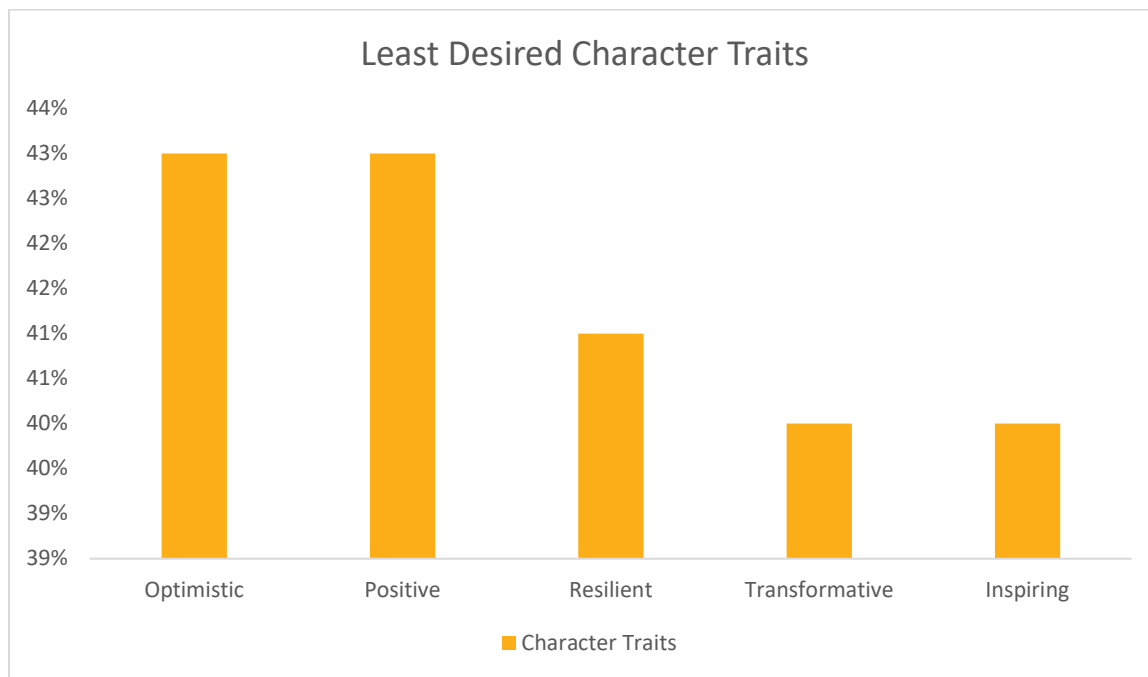
Important Character Traits

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 was important.

The most desired character traits from staff respondents are accountability, being anti-racist, open to new ideas, honesty, and collaboration with accountability being the highest at 86%. You can see accountability and collaboration as the most desired traits across all survey audiences. Anti-racist, open to new ideas, and honesty overlapped with the Board for being the top traits wanted.



The least desired character traits were determined by pulling the five traits that were selected the least number of times. Of the least desired traits, inspiring is the one trait that does not show up in the remaining audiences’ bottom list. The remaining four traits mimicked what the Board audience survey had as their lowest traits. However, due to the number of responses in the Board survey, a correlation cannot be established. Transformative and inspiring were the traits checked off the least number of times, making it the least desired trait for staff respondents at 40%.

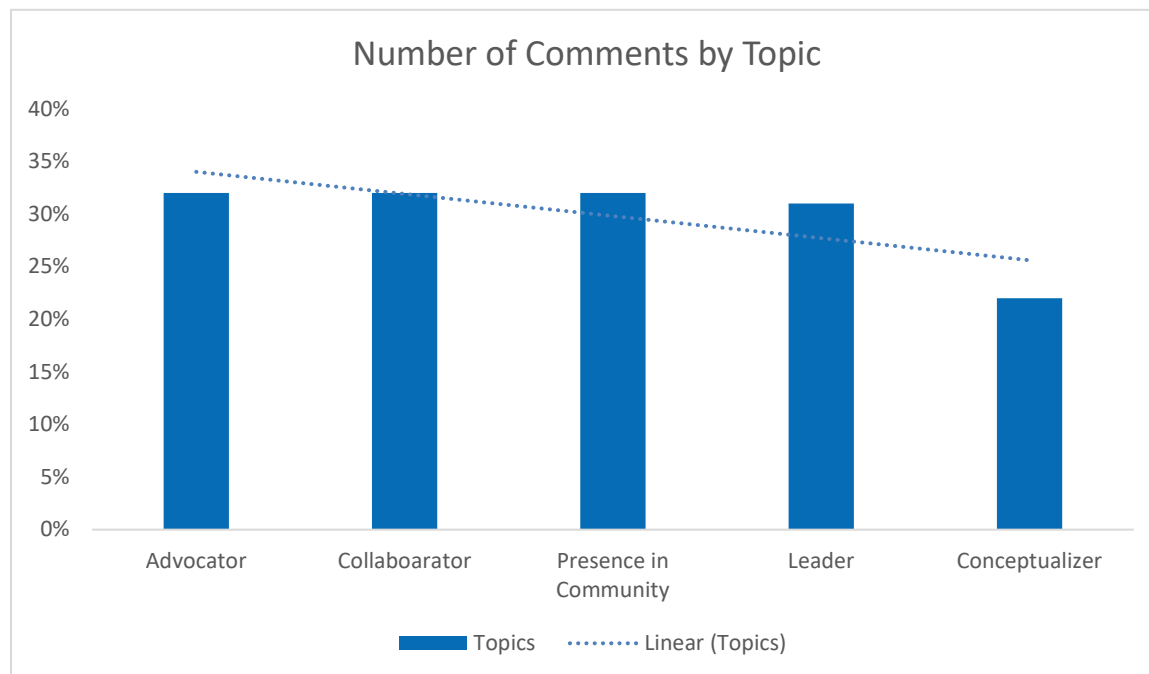


Diversity, equity, and inclusion was a common theme when discussing critical aspects to consider which is proven with anti-racist being a highly desired trait as well as supporting different backgrounds and cultures and identifying unfairness as a highly desirable background experience.

Desired Role for CEO in the Community

The CEO Succession Planning Survey provided staff 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 staff comments. The topics are Advocator, Collaborator, Presence in Community, Leader, and Conceptualizer.

The staff audience had a total of 72 comments with an average of 21 mentions per topic. Conceptualizer received the lowest mention at 16 and most staff responders mentioned more than one topic.



Advocator

There were 23 staff respondents who mentioned being an advocator as a desired role for the CEO to have in the community. Most commenters on the staff survey mentioned being an advocator for the community but also for staff as well. Themes that emerged when discussing the community only were proudly advocating for underserved populations, addressing inequities for mental health, and advocating for services and funding. Staff respondents also feel that a desired role for the CEO is advocating for individuals who work in the field of providing mental health services and aiding in improving the quality of life for both employees and clients.

Collaborator

The role of collaborator also received 23 comments. Most commenters on the staff survey mentioned collaboration with community members and organizations while also discussing the importance of advocating as if they go hand in hand. Commenters suggested that in order to be a good collaborator and build bridges one must have a background in mental health.

Presence in Community

The role of presence in the community received 23 comments as well. Most commenters on the staff survey mentioned visibility and having a voice in the community. When speaking of visibility staff made comments wanting the CEO to increase or maintain presence in the community because it shows that money and profit are not the only things concerning the new CEO. When speaking of having a strong voice, staff respondents mentioned a strong voice is important for the community as well as employees. The consensus is that the new CEO should be a spokesperson and representative of the agency in the community.

Leadership

Staff respondents discussed leadership in two ways. One of the ways leadership was described was in reference to leading the staff. A running theme of those commenters was that they'd like to see a CEO whose leadership of employees aligns with the value of the agency – meaning a leader who can take their passion and advocacy towards clients and the community and apply it to employees as well. The other way leadership was described was with comments that discussed leading structural changes and leading the local community as well as statewide and nationally. Comments also mentioned an inventive leader who will transform the way we help in the community and someone who can lead our agency into the future.

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 see beyond limitations, someone who already possesses a forward-thinking trait, and someone who is capable of bringing improvements to fruition. Conceptualizers are known for being intensely practical, but most staff respondents 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.