

# SUMMARY OF LEARNINGS



## KEY LEARNING QUESTIONS

- ### Strategic Restructuring Fund
- What have we learned about the grantee experience?
  - Is the NSI a valuable and effective tool?
  - Is the NSI changing the nonprofit sector?
  - How will these findings shape NSI future efforts?

- ### Executive Transition Fund
- What have we learned about the grantee experience?
  - How do grantees define success?
  - How do grantees define readiness?
  - How will these findings shape NSI future efforts?

## KEY EVALUATION & LEARNING ACTIVITY

4 evaluation surveys	Pre Negotiation	275 evaluation surveys	3 evaluation phases
	Post Negotiation		
	Post Integration		
	2 Year Post Integration		

4 evaluation interviews	Pre Transition	49 interviews	1 evaluation phase
	3 Months Post Transition		
	6 Months Post Transition		
	1 Year Post Transition		

# STRATEGIC RESTRUCTURING

## Is NSI worth the investment?

- **Time** | Majority of survey respondents indicated their negotiation process lasted 3-12+ months
- **Funds** | Average negotiation grant size is \$34,000

Of 105 grantee respondents, 99% reported that **regardless of their result, they found the negotiation experience valuable.**

## What organizational impact are grantees reporting?

Organizations that have participated in a negotiation identified the greatest impact on: (105 survey responses)

- internal clarity and strategic direction
- ability to think strategically

Organizations that have implemented an agreement identified the greatest impact on: (20 survey responses)

- brand/reputation
- expertise/knowledge

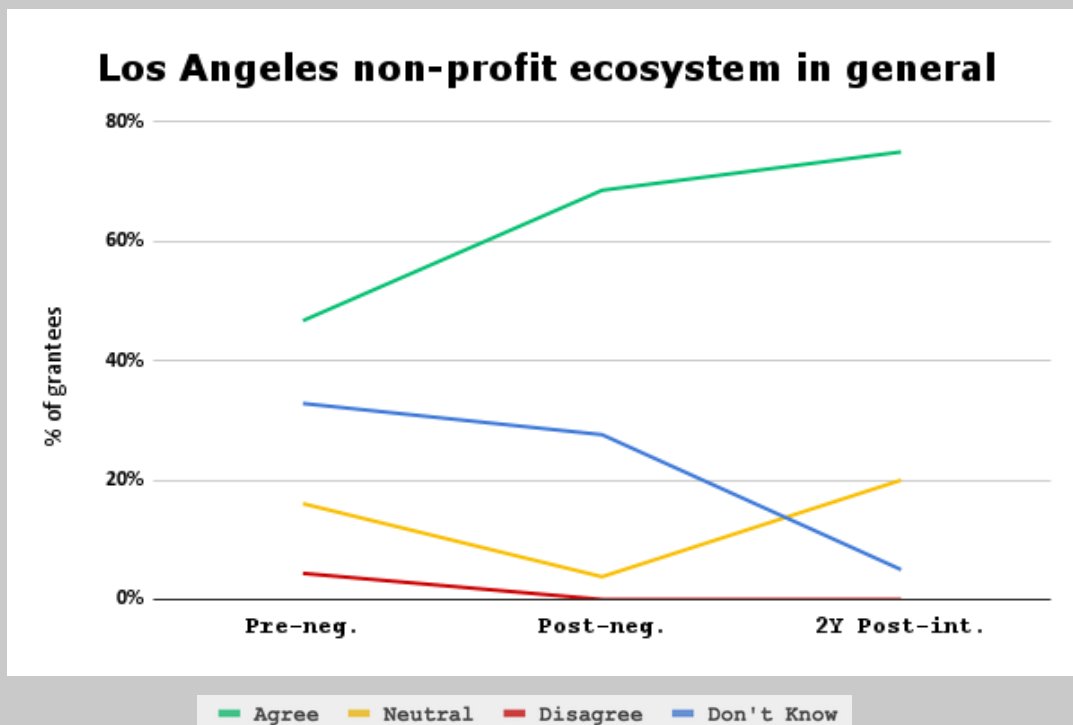
## What challenges are grantees experiencing?

Most commonly identified challenges:

- Cultural differences
- Shared vision
- Capacity/Time
- Stakeholder buy-in/Trust
- Merging/Integrating
- Funding

## IS THE NSI ACHIEVING ITS GOAL?

NSI's long-term goal is for Los Angeles' nonprofit ecosystem to view strategic partnerships as tools to promote organizational efficiency, efficacy and sustainability. Below are graphs representing grantee views of NSI's impact in the nonprofit sector.



Survey Respondents  
[Pre-Negotiation 137]  
[Post-Negotiation 105]  
[2Y Post Integration 20]

# EXECUTIVE TRANSITION

## THE COHORT

7

transitions

4

founders

4

plans to engage executive as consultant

3

planning to hire first BIPOC leader

3

exploring co-leadership model

2

identified internal successors

1

exploring strategic restructuring

## HOW THE PILOT COHORT DEFINES READINESS & SUCCESS

16 transition interviews to date (definitions are listed in order of % of grantees that selected the definition)

### What make an organization ready for a stable transition?

Top three themes identified by the cohort:

1. Board is educated about organization's work and engaged early and often through transition
2. Departing leader is personally ready
3. Plan in place for transfer of knowledge and relationships

### One year post-transition - how will you know your transition was successful?

By percentile of grantees that define each point as a measure of success

- Positive Staff Morale | 87%
- Strong operational performance, including partnerships intact or enhanced | 80%
- Funding consistent with pre-transition levels | 73%
- New leader is confident in their role & engaging at a strategic level | 67%
- Advancement on organization's equity goals | 60%
- Organizational values intact (or assessment of values through process) | 60%

## INITIAL LEARNINGS

- Value of cohort structure to combat isolation and normalize feelings around transition
- Staggered transition timelines enable peer mentorship
- Value of executive coaching for outgoing and incoming leaders
- Interest in convening board chairs separately
- Need for resources related to vetting search firms, and exit compensation package considerations
- Full cost of transition is >\$150,000

## GRANTEE ADVICE

- Have an open conversation around ongoing role for transitioning leader; caution against a role that will overshadow/negatively impact the incoming leader
- As the board chair, it's your job to mobilize the board to own the process, find the sweet spot between listening and driving, and create those trusted circles where you can hear from others who have gone through it before
- Give yourself more time than you think you'll need (particularly for founder transition)
- Announce early and solicit transition funds from loyal funders; frame communications with a strengths lens
- Both outgoing and incoming leaders should find a coach