

Case Example: Building Clarity and Accountability



1. Situation

- Non-profit, faith-based organization
- Serve private donors who wish to set up self-directed giving funds
- Largest organization of its kind in the US
- More than \$1 Billion in Assets
- Approximately \$500 Million in annual disbursements
- Doubled in size over past 5 years
- Undergoing founder transition

3. Deliverables

- Assignment of Accountabilities: developed AOA's for all of the Executive and Management Team
- Board of Directors' Advisor Role: assisted Board in evaluation of management team and preliminary search for replacement for Founder
- Enterprise Commitment Index

Non-Profit
Organization

2. Key Issues

- Rapid growth has created lack of clarity with management roles
- Some challenges and tension with diminishing role of founder
- Personal tragic events among leadership team caused distractions
- Fragile back office operating systems

4. Results

- Established clear roles for Executives and management team
- Provided process for objective evaluation of Executives, coaching for Executives and Board as new roles were established, built process for Executive Search
- Provided objective data on Employee Engagement, comparison with previous years' results, and recommendations for current year actions

"Our sense of clarity and accountability among the Senior Management team has enabled us to work more effectively ."

President, Non-Profit