



SPARROW SOLUTIONS  
GROUP



# Positioning Your ED/CEO for Success: *(Development, Performance, and Review)*

The average tenure for an ED/CEO of a PMC is less than five years. Could it be that we position them for burnout? For failure?

Oftentimes new EDs/CEOs are hired for PMCs based on their passions, experiences, and leadership skills, though they may have never had past experiences or trainings related to their new position. What begins with optimism and excitement begins to fade long before the honeymoon is over.

Even seasoned EDs/CEOs may find themselves scrambling to stay on top of the latest trends, unsure if they are really using their time most wisely, but so overwhelmed by the tyranny of the urgent, they doesn't know how to get on top of it all to lead the organization from good to great.

- Increase ED/CEO confidence quickly
- Maximize ED/CEO potential
- Decrease organizational risk
- Reduce ED/CEO stress



SPARROW VALUE

The EDs/CEOs may easily become overwhelmed as people expect them to be experts in fiduciary responsibilities, accounting and budgeting, HR, donor development and ministry relations, event planning, administration, grants, curriculum, patient flow, and more.

To make the situation more challenging, oftentimes board members rotate off the board so frequently; it leaves the organization with little to no stability. Who's leading whom? Does the board lead the ED/CEO, or does the ED/CEO lead the board?

How does a board know that their ED/CEO is doing what she's supposed to be doing? And if they don't know, how can they position him/her for success,

much less evaluate his/her performance? What criteria should they use? And how can the review process be one that encourages him/her and promotes success rather than one that takes the wind out of his/her sails?

*How do you develop an ED/CEO to maximize his/her potential?*

## **Program Overview**

The ***Positioning Your ED/CEO for Success*** course has two options:

- **More than Mentoring** - 12-mo mentoring program w/monthly webinar
- **PMC Leadership Concentrated** – Pre-onsite assessment, 1+1 days of on-site training with two consultants, followed by **More than Mentoring** - 12-month mentoring program with monthly webinar

*Both courses help equip the PMC board to position their ED/CEO for success.*

### **More than Mentoring: *Positioning Your ED/CEO for Success***

Scope of Service:

- Initial introductory phone call up to one hour with PMC ED/CEO and minimum of three Sparrow consultants who have expertise serving as a PMC ED/CEO
- Monthly webinars will be taught by Sparrow consultants on topics to include the following areas:
  1. Communication
  2. Fiduciary responsibilities
  3. Board/ED role and responsibilities
  4. Staff development and team building
  5. HR
  6. Donor & other partner relationships (like grants)
  7. Fund-raising
  8. Event planning
  9. Accounting and budgeting
  10. Administration and time appropriation
  11. Patient marketing
  12. Patient-services platform
- Each webinar will begin with instructional time, followed by time for Q&A, also giving opportunity for building camaraderie among ED participants
- Monthly mentoring/coaching calls, 1 hr/session, or divided up if needed, plus four additional hours included with fee as needed, for total of 16 hrs
  - Action plans from webinars will be discussed and reviewed
  - Consultant will discuss how to evaluate outcomes
  - Consultant is available to answer questions as needed

## Objectives:

- Participants will develop action plans related to 12 critical areas of ED/CEO responsibility
- Participants will discuss action plans with Sparrow consultant and develop a plan to evaluate outcomes and measure success

## **PMC Leadership Concentrated: *Positioning Your ED/CEO for Success***

This course is unique in that it includes training for both the ED/CEO and the board in their respective roles as it relates to the development, performance, and review of the ED/CEO.

Additionally, as the ED/CEO works through this process for herself, she will learn skills that will equip her in using the same process with the team she is leading, further positioning her to lead both her team and the organization as a whole for success.

This program begins with a review of ED/CEO job description and role definition, followed by an assessment of current skills and needs.

A customized training plan is then developed to leverage the ED/CEO's current skill set for maximum impact in the position and the community. A review process is mapped out to provide tracking and accountability for both the ED/CEO and the board.

The **PMC Leadership Concentrated** program consists of pre-visit assessment, onsite training and 12-month follow-up consultation for both ED and a board member.

### Scope of Service:

- 1) Pre-assessment by ED and a minimum of three board members (Executive Committee, Personnel Committee, or other board members that will be directly involved in the process)
  - a) Pre-assessment forms to be completed by each
  - b) Current job description, bylaws, and other documents related to ED/CEO roles and responsibilities sent to Sparrow for review prior to on-site visit
- 2) On-site training to be 1+1 days
  - a) Shadow the ED/CEO half day
  - b) Assess and prioritize organization needs and create customized development plan implementation structure
  - c) Meet up to 4 hours with ED/CEO and board committee involved with pre-assessment to develop strategies for team integration and cohesiveness
  - d) Develop timeline and long term planning schedule
  - e) 1 day follow-up review at 6, 9, or 12 months, TBD

### 3) Distance Consultation

- a) **More than Mentoring** (see details for ED above)
- b) Board member – 12 monthly leadership coaching calls, 15 minutes per session, plus 60 additional minutes included as needed, for total of 4 hours, to keep board abreast of progress. ED may be included if desired.

#### Objectives:

- a) Participants will learn roles and responsibilities of ED/CEO.
- b) Participants will learn how to develop an ED/CEO performance plan that positions the ED/CEO for success.
- c) Board members will learn how to review the ED/CEO in a way that fosters continued growth and optimizes professional development.
- d) Participants will evaluate existing ED/CEO skills and practices related to fiduciary responsibilities, board/ED roles and responsibilities, donor relationships, staff development, accounting and budgeting, event planning, HR, fundraising, administration, time appropriation, day-to-day operations of the PMC, etc.
- e) Participants will create a performance plan that includes development, assessment, and review as part of the process.
- f) Participants will develop action plans related to 12 critical areas of ED/CEO responsibility
- g) Participants will discuss action plans with Sparrow consultant and develop a plan to evaluate outcomes and measure success

### Materials

The materials needed for **More than Mentoring** are included in the fee set forth below and will be provided throughout the 12-month period by Sparrow consultants. Materials produced by Sparrow are copyright protected and may not be duplicated.

The materials necessary to complete the **PMC Leadership Concentrated** include 4 course manuals, included in the fee set forth below. Additional reading will also be required and is NOT included in the fee set forth below.

### Fees

A. The following fee of \$3,000 for ***More than Mentoring: Positioning Your ED/CEO for Success*** includes:

- Initial consultation with your ED/CEO and Sparrow consultants
- 12 webinars for ED/CEO, one each month
- 12 1-hour mentoring/coaching calls for ED/CEO
- Up to 4 hours additional mentoring/coaching as needed for ED/CEO
- Additional consultation billed at \$125/hour.

A deposit of \$1,500 is required to schedule training.

- B. The following fee of \$6,800.00 for **PMC Leadership Concentrated and *More than Mentoring: Positioning Your ED/CEO for Success (Development, Performance, and Review)*** 12-month training course include two onsite visits and distance consultation:
- 1) Participating Clinic
    - a) **PMC Leadership Concentrated and *More than Mentoring: Positioning Your ED/CEO for Success (Development, Performance, and Review)*** fee of \$6,800.00 plus expenses includes:
      - Training for your ED/CEO
      - Training for your board (or board committee—at least 3 board members REQUIRED)
      - Training at clinic's location with training tailored to clinic's specific needs
      - Includes 16 hours distance consultation for ED/CEO and 4 hours distance consultation for a board member or board committee. Additional consultation billed at \$125/hour.
    - b) A \$3,400.00 deposit is required to schedule training
  - 2) Expenses are invoiced separately:
    - a) Air fare for training staff
    - b) Accommodations for training staff
    - c) Rental car for training staff
    - d) Per Diem for training staff

**Scholarships and packages available.** Please complete application for consideration.

If you have any questions or concerns regarding our services, please contact Ginnie Wilson 702-925-8737.