

CONNECTS

CASEY

FALL 2004
A REPORT FROM THE
ANNIE E. CASEY FOUNDATION

IN THIS ISSUE: Finding Opportunity in Transition; Notes of Recognition;
EITC Campaign Bringing Many Happy Returns; INSITES

FINDING OPPORTUNITY IN TRANSITION

The departure of a current leader and the hiring of a new executive director or chief staff officer can disrupt even a strong, stable organization. Too often, an agency flounders, and its ability to provide high-quality services to children and families suffers.

Over the past decade, however, a group of consultants and management support organizations have discovered that these periods of change can present some exciting opportunities. During the last four years, the Annie E. Casey Foundation has invested in a strategy called Executive Transition Management (ETM), which can limit the perils of transition and help organizations not only survive, but thrive in the process.

“Nonprofit leaders and funders have always held their breath and hoped for the best when leadership transition happened,” says Ralph Smith, senior vice president of the Casey Foundation. “We now have a way to not only reduce risks, but to advance the capacity and impact of the organization during the transition.”

While not everyday occurrences, leadership transitions in nonprofit organizations are common. Preliminary data suggest that more than 10 percent of all nonprofits experience a transition annually. This percentage will likely rise as the leading edge of the baby boom generation retires in the next ten years.

A 2001 Foundation-supported survey of more than 100 executives of community-based grantees showed that 85 percent planned to leave by 2007. Subsequent studies by the Maryland Association of Nonprofit Organizations and CompassPoint Nonprofit Services have confirmed what will likely be a sea change in executive leadership in the coming decade. A 2003 survey of 170 community foundations found that 53 percent of executives plan to leave in the next five years, 73 percent of them for retirement. CONTINUED ON PAGE 4



Roger Clay, left, current director of the National Economic Development and Law Center, is guest lecturer for a community economic development seminar taught at Hastings College of Law in San Francisco by the organization's former director, James Head, right.

RAY CHAVEZ

NOTES OF RECOGNITION

CASEY CONNECTS

Fall 2004

A quarterly newsletter published by

The Annie E. Casey Foundation

701 St. Paul Street

Baltimore, MD 21202

Phone: 410.547.6600

Fax: 410.547.6624

www.aecf.org

James P. Kelly

Chairman

Douglas W. Nelson

President

Ralph Smith

Senior Vice President

Tony Cipollone

Vice President

Dana Vickers Shelley

Director of Strategic Communications

Joy Thomas Moore

*Manager of Grantee Relations and
Media Projects*

Deborah L. Cohen

Editor

John Beilenson, Betty Marton,

Sarah Torian

Contributing Writers

Kristin Coffey

Copyeditor

Kathryn Shagas Design

Design and Production

© 2004, The Annie E. Casey Foundation,
Baltimore, Maryland

The Annie E. Casey Foundation is a private charitable organization dedicated to helping build better futures for disadvantaged children in the United States. The primary mission of the Foundation is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families. In pursuit of this goal, the Foundation makes grants that help states, cities, and neighborhoods fashion more innovative, cost-effective responses to these needs.

JOHN MATTINGLY Helping to protect children like 8-year-old Stephanie Ramos—a medically fragile child who died of natural causes but whose body was thrown onto a garbage heap by a foster mother who suffered a mental breakdown—was one of the responsibilities John Mattingly faced as he assumed the post of commissioner of the Administration for Children's Services (ACS) in New York City in August.

Mattingly, a nationally recognized child welfare expert, left the Casey Foundation after 12 years to take charge of New York City's first freestanding agency serving children and their families. Established in 1992, ACS has been recognized in recent years for successes in many areas, such as child protection, recruitment and training of foster parents and caregivers, and helping young people transition out of foster care.

As a key architect and manager of the Foundation's Family to Family program since its inception in 1992, Mattingly developed a model for foster care—connecting children's foster families with their birth families, building partnerships with local organizations, and placing children in their home communities—that became the centerpiece of the revamped ACS. As a member of the New York City Special Child Welfare Advisory Panel, which was established under a court order, Mattingly played an instrumental role in helping to bring this model and other reforms to ACS.



“John is our most valuable contribution to date to New York City and to child welfare,” said Casey Foundation President Douglas W. Nelson. “Nobody is more likely to protect the reforms under way in New York City and build a real example of what’s possible in child welfare.”

At the Foundation, Mattingly most recently served as director of human services reform for the Casey Strategic Consulting Group, which works with state social services departments to implement reforms—often precipitated by crises—designed to improve outcomes for vulnerable children.

“This city has the right to expect its child welfare, child care, and Head Start programs to be the best in the country, and that’s what we intend to accomplish in the coming years,” Mattingly said at a recent news conference.

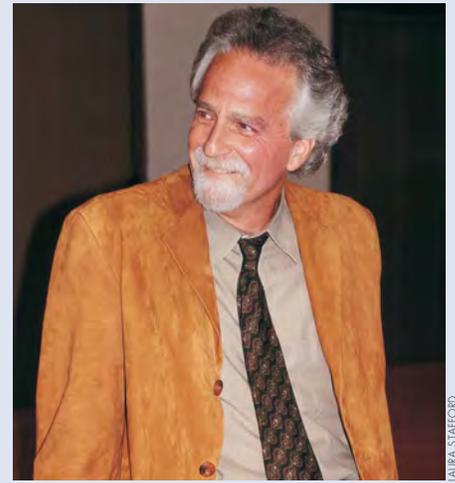
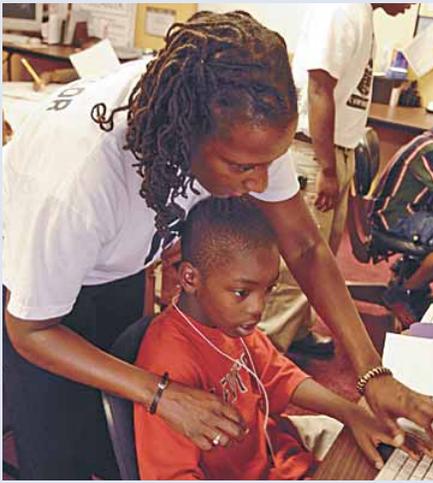
SANDRA BARNHILL Former Casey Foundation Children and Family Fellow Sandra Barnhill has won a prestigious award from the Ford Foundation.

Barnhill was one of 18 recipients—selected from nearly 1,000 nominations—of the 2004 Leadership for a Changing World Award, which recognizes people and groups tackling some of the nation’s most entrenched social and economic challenges.

Barnhill is the executive director and chief executive officer of Aid to Children of Imprisoned Mothers (AIM) in Atlanta, an organization she founded in 1987 that offers support to help these children achieve academically and socially and maintain healthy relationships with their mothers.

“I hope that this award focuses more attention on this critical issue,” Barnhill said.

Awardees will each receive \$100,000 to advance their work and an additional \$15,000 for supporting activities over the



Page 2, John Mattingly. Above, Sandra Barnhill with a child in the AIM program; Irene Lee; Bart Lubow. Page 4, Los Angeles City Councilman Bernard Parks, Victoria Rowell, and David Sanders, director of the Los Angeles County Department of Children and Family Services.

next two years, and will participate in a multiyear research initiative exploring how leadership is created and sustained. For more information, visit www.leadershipforchange.org.

IRENE LEE Each year at Turner Field, the Atlanta Braves celebrate their home neighborhood of Pittsburgh, a low-income, working class African-American neighborhood that has turned itself around in recent years. As headquarters of UPS—the company founded by Jim Casey—Atlanta is one of the Foundation’s “civic sites,” meaning a place where it has a unique long-term commitment, presence, and set of connections.

At the Braves’ celebration in July, Foundation staffer Irene Lee was honored for her work in implementing economic success strategies that have contributed to the Pittsburgh neighborhood’s turnaround.

“The civic site wouldn’t have happened without Irene,” said Peggy Harper, president of the five-neighborhood planning unit (NPU-V) that includes Pittsburgh. “Because of her dedication, the level of community participation and the future of Pittsburgh have improved 100 percent.”

Lee also played a strategic role during the mid-90s in the effort to restart the

Atlanta Empowerment Zone, which supports a broad range of human services, safety, housing, and economic development programs. And as a *Making Connections* site team leader, she helped establish a data warehouse mapping the location of the most disadvantaged children and families in Atlanta.

Lee also assembled a strong local team to manage the day-to-day work in Atlanta so she can fulfill her responsibilities as interim director of the civic investments unit and as manager of the Foundation’s immigrant and refugee portfolio and of investments in Washington, D.C.

“Irene leads with data and results,” said Gail Hayes, the local Atlanta civic site coordinator. “She is always looking for ways to expose community leaders to good ideas and to build capacity.”

BART LUBOW As head of the Foundation’s Juvenile Detention Alternatives Initiative (JDAI) for more than a decade, Bart Lubow has looked for ways to keep kids out of local detention centers and to improve conditions and reduce racial disparities in local juvenile detention systems. His efforts have captured the attention of the National Council on Crime and Delinquency and

won him the 2004 Albert Elias Award. The award, named for a New Jersey researcher and practitioner who also pioneered alternatives to detention, recognizes individuals who have made outstanding contributions to juvenile justice.

“Bart Lubow’s work has helped refine the state of the art for youth detention, moving JDAI beyond its beginnings as a demonstration project,” said Barry Krisberg, president of the National Council on Crime and Delinquency. “His supervision has been essential to a new standard in keeping with the spirit of the work of Albert Elias.”

The power of JDAI’s core strategies has been demonstrated in multiple sites and the initiative is now being replicated nationally. One JDAI site that has received considerable attention is Multnomah County, Oregon. This site safely reduced reliance on secure detention and was able to substantially reduce racial disparities in the use of detention.

At the outset of Multnomah County’s detention reform work, youth of color had a significantly higher likelihood of being detained following arrest than white young people did. After JDAI reforms were implemented, the odds of being detained were equalized and lowered for all youth, regardless of race or ethnicity.

JDAI enables jurisdictions to safely reduce reliance on secure detention through a variety of closely interrelated strategies documented in a series of monographs, *Pathways to Juvenile Detention Reform*, which can be ordered through the Foundation's website, www.aecf.org.

VICTORIA ROWELL The struggles of a young boy living in a group home and the woman who wants to keep him from being shunted about in the system



are all too real to people involved in the child welfare system. But this story, which has all the elements of a soap opera, has actually become one on the CBS award-winning series, *The Young and the Restless*.

The idea for the soap opera was promoted by Victoria Rowell, a star of *The Young and the Restless* and a one-time foster child. Rowell—who is the founder and president of her own foundation, Rowell Foster Children's Positive Plan, and

CONTINUED ON PAGE 6

FINDING OPPORTUNITY IN TRANSITION

CONTINUED FROM PAGE 1

The growth in the number and scale of nonprofit organizations also will continue to drive demand for leadership talent, says Tom Tierney, chairman and founder of the Bridgespan Group, a leading nonprofit strategy consulting firm. "All indications are that the supply of executive talent available to the sector will not keep pace with this need," says Tierney. "It is a situation that generally reflects the overall demographics of the American workforce in the decades ahead."

Combine these trends with the turbulence usually associated with transitions and the nonprofit sector can expect to face significant challenges in the next several years. One response is ETM services, which give board leaders and executives a chance to take charge of transitions and transform them into pivotal opportunities.

Trained consultants work with an organization and its board to seek a harmonious ending for the departing director and an auspicious beginning for the new one. Executive Transition Management also makes certain that the new leader is selected with an eye to the aspirations and direction of the organization and the kind of leadership team needed to move forward. This strategy also focuses on assessing the organization and building its capacity in a way that distinguishes ETM from more traditional search processes.

"[ETM consultants] are able to reassure an organization in transition that there are real benefits in resisting the understandable rush to hire," says Tom Adams, president of TransitionGuides, a Foundation grantee taking the lead on its leadership transition efforts. "The transition period may feel confusing and disruptive, but it offers a powerful opportunity for an organization to take stock, consider its vision and strategy, and attend to any structural weaknesses."

What can we do to ensure there is a big and diverse enough group of leaders available to replace the large number of boomer executives now poised to retire? One response, says Donna Stark, director of leadership development at the Casey Foundation, "is identifying how to prime the pipeline and ensure that the nonprofit sector attracts an increasingly diverse and competent group of 'next generation' leaders able to improve outcomes for children and families."

Initially, some of the gap may be filled by current executives working longer or in consulting positions and by the large group of boomers now in their mid- to late 40s. By 2010, however, the leadership pool will likely start to shrink. To prepare, nonprofit leaders must start to address some important dynamics in their own organizations.

With Casey support, Frances Kunreuther, director of the Building Movement Project in New York City and a former Casey Foundation Children and Family Fellow, has been holding focus groups with diverse gatherings of 25- to 40-year-old leaders in seven cities around the country. Early findings point to a dearth of recognizable career ladders in many nonprofits and a lack of attention by older leaders to providing leadership development opportunities. The good news is that these younger leaders show little inclination to leave the sector.

"On the whole, I am optimistic," says Kunreuther. "There are lots of young people who will be fantastic leaders. The challenge for older executives today is to pay attention and take deliberate steps to give them the support and experience they need."

For more information about leadership transitions, contact Sherri Killins at skillins@aecf.org.

EITC CAMPAIGN BRINGING MANY HAPPY RETURNS

In 2001, Elizabeth Crespo filed her taxes for the first time at a free tax preparation site set up as part of a Philadelphia program called the Campaign for Working Families. The single mother of five children between the ages of 10 and 16 found she was eligible for the Earned Income Tax Credit (EITC) and other tax credits that she was able to use toward the purchase of a new home for herself and her family.

Crespo now pays \$539 each month in mortgage payments—much less than the \$800 in rent she used to pay. The following year, the money Crespo received from her refund and the EITC allowed her to eliminate some bills, pay off more credit cards, and buy a used car that gets her to work more easily. This year, when Crespo filed her 2003 tax return, she received \$2,057 from the EITC. She plans to use part of the money to take her family on a beach vacation, where they can enjoy the benefits of her hard work.

Philadelphia's campaign to use free tax preparation services as a starting point to help low-income working families claim tax credits and start to build savings and assets is one of 41 programs in 29 states receiving support as part of the Annie E. Casey Foundation's National Tax Assistance for Working Families Campaign. Coalitions of community organizations, city and county government, banks, local United Ways, and other public- and private-sector groups hosted 414 tax preparation sites and prepared taxes for 158,410 individuals and families during the 2004 tax season. They connected tax filers to more than \$98 million in Earned Income Tax Credits, more than \$28 million in



Elizabeth Crespo and three of her children, Edison, Maria, and Rafael.

Child Tax Credits, and nearly \$29 million in state tax refunds. Overall, the campaign helped families claim close to \$226 million in total tax refunds.

These free tax preparation sites are staffed almost entirely by volunteers. In 2004, more than 5,800 volunteers contributed their services.

The goals of the National Tax Assistance for Working Families Campaign are threefold. First, coalitions conduct outreach to increase awareness of the EITC. It is estimated that 15 percent of workers eligible for the EITC do not receive it. Second, the coalitions host tax preparation sites to provide an alternative to high-priced tax preparation services, which can cost more than \$250. In addition to paying high prices for tax preparation, some 43 percent of people eligible for the EITC pay a premium to apply for Refund Anticipation Loans that allow them to receive their returns in one or two days.

Finally, the campaign takes advantage of the tax season to connect EITC-eligible filers to savings and asset-building opportunities and financial education services.

In 2002, the EITC lifted 4.9 million individuals, including 2.8 million children, above the federal poverty line. Federal expenditures on the EITC and Child Tax Credit are nearly equivalent to what is spent on food stamps and the federal welfare program.

The National Tax Assistance for Working Families Campaign has grown rapidly in just a few years. Local coalitions have increased the number of customers they serve by more than 60,000 by adding new campaigns and expanding existing coalitions. A tax preparation coalition in Louisville, Kentucky, for example, increased the number of customers served from 600 in its first year to 2,600 in its third. The coalition in Savannah, Georgia, increased its tax preparation sites from six last year to ten this year and more than tripled the number of customers, from about 300 to about 1,000.

Local coalitions are committed to providing their customers with high-quality services, comparable to if not better than those provided by paid commercial tax preparers. The Casey Foundation, the IRS, and tax preparation coalitions from across the nation have begun working together to collect and disseminate best practices as well as to improve sites' capacity to provide high-quality services.

"This year, we are not looking for a dramatic expansion in numbers," notes Gwen Robinson, a program associate at the Foundation. "We are looking to deepen the quality of the work so we can serve families better."



The Annie E. Casey Foundation
 701 St. Paul Street
 Baltimore, Maryland 21202
 Phone: 410.547.6600
 Fax: 410.547.6624
 www.aecf.org

Return Service Requested

PRSRT STD
 U.S. POSTAGE
 PAID
 LONG GREEN, MD
 PERMIT NO. 2

NOTES OF RECOGNITION

CONTINUED FROM PAGE 4

spokesperson for Casey Family Services— was honored in August, along with Sony Pictures Television and CBS, by the Los Angeles County Department of Children and Family Services.

“By creating a story line that accurately and powerfully portrays the foster care experience, Ms. Rowell, Sony, and CBS are contributing an invaluable service to the more than half-million children in foster care today,” said David Sanders, director of the Los Angeles County Department of Children and Family Services.

FILMS

CINE, a mark of excellence in film and video for more than a half century, has honored two Casey Foundation-supported productions.

Aging Out illustrates the daunting obstacles three young adults face in pursuing their dreams as they journey from foster care to independent living. With little financial or family support or preparation for survival, they battle drug addiction, homelessness, the welfare and juvenile justice systems, and their own deeply scarred childhoods. Produced by Roger Weisberg and Vanessa Roth, *Aging Out* is scheduled to air on PBS in 2005.

The film was supported by the Jim Casey Youth Opportunities Initiative, which is jointly funded by the Casey Foundation and Casey Family Programs.

In the film *What I Want My Words To Do To You*, 15 women inmates, most incarcerated for murder, explore the experiences that brought them to this point in a writing workshop led by playwright Eve Ensler (*The Vagina Monologues*) at New York’s Bedford Hills Correctional Facility. A production of the Casey-supported Reentry National Media

Outreach Campaign, the film culminates with performances of the women’s writing by actresses Mary Alice, Glenn Close, Hazelle Goodman, Rosie Perez, and Marisa Tomei.

Produced by Judith Katz, Madeleine Gavin, and Gary Sunshine, *What I Want My Words To Do To You* premiered last December on the PBS show *P.O.V.*

Right, Daniella and Veasna Rin Hover, a young couple featured in the documentary *Aging Out*. Below, from left, playwright Eve Ensler and actresses Hazelle Goodman, Marisa Tomei, Glenn Close, Mary Alice, and Rosie Perez in *What I Want My Words To Do To You*.



COURTESY BENNETT

COURTESY OF WHAT I WANT MY WORDS TO DO TO YOU

INSITES

FALL 2004

A REPORT FROM THE
ANNIE E. CASEY FOUNDATION

TAKING STOCK AND TAKING CHARGE WHEN A LEADER LEAVES

It takes a village—including a broad constellation of dynamic nonprofit organizations—to get results for disadvantaged children and families. Strong, stable, and creative leadership at these agencies is critical. When such a leader steps down, it may disorient an organization, reduce its effectiveness, and compromise its impact on the people it serves.

On the other hand, leadership change can also be a powerful entry point for strengthening an organization. “It is a natural moment of organizational stock-taking and constructive ferment,” notes Tom Gilmore, vice president of the Center for Applied Research and author of *Making a Leadership Change*, a seminal book on the subject. While also a period of anxiety, he says, “there is a high upside gain,” especially if the organization gets the new ideas, technical support, and opportunity to network with peers that it needs. This is the kind of support the Casey Foundation’s Executive Transition Management (ETM) initiative aims to provide. The following stories offer a few examples.

In 1978, two Catholic nuns trained as social workers founded a modest program in the Sunset Park neighborhood of Brooklyn, New York, to fill a much-needed niche offering family-friendly services for immigrant and low-income families. By 2000, the Center for Family Life in Sunset Park had grown into a comprehensive family and youth services organization with a budget of \$3.5 million, assisting 4,000 families and children annually. The two founders, Sister Geraldine Tobia and Sister Mary Paul Janchill, served as codirectors and managed a talented team running the center’s programs.



STEPHANIE THOMAS

At center, Sister Mary Paul Janchill, a former codirector of the Center for Family Life in Sunset Park, with the two new codirectors: Julia Jean-Francois, left, and Julie Stein Brockway, right.

In 1999, Sister Geraldine was diagnosed with cancer. When she died in April 2000, her loss shook the center and its staff. “We were in great distress,” recalls Sister Mary Paul. Some advisers strongly urged the 80-year-old sister to retire and find a new executive immediately. She and the staff, many of whom had worked at the center for more than a decade, resisted, and Sister Mary Paul stayed on. After four months, the organization selected its arts program director and layperson, Julie Stein Brockway, who had been with the agency for 18 years, as codirector.

The new leadership team stabilized the organization and demonstrated its strength and sustainability without Sister Geraldine. However, a more difficult question soon surfaced:

Rosalie Cruz, Cleo Colon, and Wildy Diaz help welcome and entertain guests at the Center for Family Life in Sunset Park's 25th anniversary community celebration.



I thought I would **STEP DOWN** some day, and we would pick a replacement codirector. I didn't **FULLY UNDERSTAND** what was involved in my decision and the **IMPACT** both for **ME** and the **ORGANIZATION**.

Could the organization survive when Sister Mary Paul ultimately stepped down?

In December 2002, Sister Mary Paul and Brockway both attended a Next Steps workshop sponsored by the Casey Foundation for founder executives considering a transition. "I became more aware of the complexity of this transition and learned a lot from the struggles of the other founders," Sister Mary Paul recalls. "I thought I would step down some day, and we would pick a replacement codirector. I didn't fully understand what was involved in my decision and the impact both for me and the organization."

Sister Mary Paul and Brockway had several meetings with Tom Adams, president of TransitionGuides, a Casey-supported collaboration of consultants working with nonprofit organizations on leadership transitions. Together, they came to terms with the need to recruit a new codirector and to transition Sister Mary Paul toward a new role. Without the emotionally challenging work required to come to this decision, the center could easily have faced another emergency succession.

"The Casey Foundation and its ETM consultants gave us a language and a way to look at issues where we were really stuck," Brockway says. "As a result, today, we have a

wonderful new codirector, Julia Jean-Francois, a social worker who brings a wealth of experience in human services and administration. Sister Mary Paul is fully engaged as an associate, and our organization is thriving despite some very difficult economic times."

The collaboration of Brockway and Jean-Francois is beginning to mirror the powerful partnership of the two sisters. "We're quite different, but in important ways our values, sense of mission and purpose, and approach to organizational change are very consistent," says Brockway. "It's really a match made in heaven."

In 1986, James Head joined the staff of the National Economic Development and Law Center (NEDLC) as executive director and later became its president. Under his leadership, NEDLC developed a national reputation for dynamic research; technical assistance and training; and excellent programs in workforce development, child care, and community development. The organization's staff grew to 25 and its budget to \$5 million. Along the way, Head expanded the group's funding base to include several national foundations, including the Casey Foundation.

When Head decided to step down in late 2002, board and staff expressed understandable disappointment and concern. There was also a sense that this was a natural time to look at the organization and its direction. “Everybody would have been delighted if James had stayed,” recalls Griffith Garwood, a board member and retired Federal Reserve Board official. “At the same time, whenever there is a change, there is an opportunity to rethink things.”

This perspective was reinforced by the board’s willingness to look beyond a traditional search and embrace the ETM process. With the help of transition consultants at CompassPoint Nonprofit Services in San Francisco, NEDLC launched a broad-ranging organizational assessment. They conducted 46 interviews and received feedback from all of the agency’s key stakeholders.

The findings from this inquiry confirmed that outsiders, particularly funders, were very pleased with NEDLC’s work. “And it wasn’t just James, it was the staff and the programs,” says Tim Wolfred of CompassPoint. “In fact, they told us they wanted NEDLC to be even more visible, more prominent, and to build its credibility and role as a policy advocate.”

get all the various parties from our client and partner communities, staff, and funders on the same page,” notes Karla McLucas, board chair.

Walker & Associates, which specializes in searches in the community and economic development field, took the skills profile and produced a high-quality pool of racially and ethnically diverse candidates. In October 2003, the board hired Roger Clay, a former partner in a housing development and real estate law firm and most recently a senior manager at the Corporation for Supportive Housing in New York. Clay had served as an NEDLC intern some 30 years ago as a law student.

Head, who recently became director of programs at the San Francisco Foundation, committed to providing a secure financial platform for his successor. “One of my issues early on in the process,” says Head, “was how to best present this transition to funders.” During the transition and then post-hire, he successfully secured foundations’ commitments to NEDLC for 2004 and part of 2005.

All of these steps helped Clay hit the ground running. He has maintained continuity in NEDLC’s broad strategic direction, made visibility an organizational priority, and laid the foundation for a more integrated management structure. “I said if you’re not willing to have someone come in and change things, then I’m not the right person,” Clay says. “What gave me the most comfort was them communicating to me that they were ready for and wanted change.”

East Baltimore is a study in contrasts. On one hand, it is home to Johns Hopkins University, the largest private employer in Maryland, internationally renowned for its medical institutions and research. It is also a group of modest neighborhoods and commercial centers undermined by decline and disinvestment.

Since its inception, the Historic East Baltimore Community Action Coalition (HEBCAC) has been a critical grassroots advocate for the area, guided by a governing council with representatives from Hopkins as well as the area’s neighborhood associations, businesses, and government.

During the 1990s, founding executive director Michael Seipp helped expand HEBCAC’s staff and spearhead its work—which today includes a range of youth and family services, economic and employment development programs, housing assistance, and public safety initiatives.



James Head, former director of the National Economic Development Law Center, works with a student in a seminar he teaches at Hastings College in San Francisco. Roger Clay, the organization’s current director, is guest lecturer.

On the inside, staff wanted more communication with leadership. With Head and other senior staff often out of the office and traveling, they wanted more contact and engagement across the organization’s program areas.

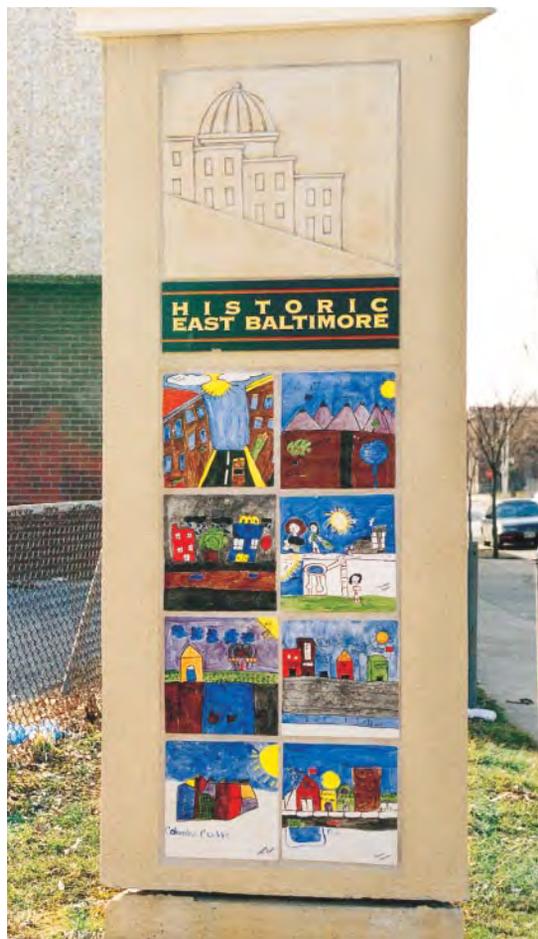
The results of the ETM review were reassuring to board and staff alike, building a sense of common direction. The review also produced a proposed profile of skills needed by the next director. The comprehensive ETM approach “was a way to

When Seipp stepped down in late 2001, the organization struggled. The search for a successor took several months to get started, and the organization's chosen candidate decided after little more than a month that the fit wasn't right. "The initial hiring process took a year, and when it didn't take, it was disappointing," recalls Jeff Thompson, the organization's director of economic development, who took over as acting director.

A subsequent organizational assessment conducted by an ETM consultant revealed a sense that HEBCAC had strayed from its original role as it responded to pressing community needs and implemented successful services and programs, including youth development, substance abuse recovery, and retail development. The assessment also highlighted differing views about the future of the organization among board members representing grassroots and institutional constituencies.

With Casey Foundation support, HEBCAC invited consultants from TransitionGuides to help restart the stalled transition in 2003. Additional interviews confirmed much of the previous organizational assessment, leading TransitionGuides to recommend that HEBCAC clarify its strategic direction to help determine the kind of executive it wanted. At a December retreat facilitated by TransitionGuides, the board recommitted HEBCAC to its role as community developer, convener, and builder.

"One of the chief benefits of all of the consultants was that they were outsiders, above the intraboard politics," says board member Efreem Potts, a commercial real estate manager with long-standing connections to the East Baltimore community. "They were able to acknowledge the differing views and keep us on track."



A community marker created as part of a Historic East Baltimore Community Action Coalition project in which children were asked to sketch their vision for the future of East Baltimore.

The retreat and the increasing strategic clarity then enabled the board to reenergize the search process. There was enough confidence to spread the net beyond Baltimore and seek candidates up and down the eastern seaboard.

In May, HEBCAC hired Edward Sabatino, a senior executive with the United Way of Metropolitan Atlanta. While fulfilling his commitments to the United Way through November, Sabatino, who grew up in the Baltimore area, is already working closely with staff and meeting with large numbers of board members, funders, community residents, and other key players. Building from last year's retreat, he has already created a more precise strategic direction and work plan for the organization, which was approved in early October.

As Sabatino settles into his new position, he says, "There has not been one surprise throughout the transition process." HEBCAC and its leadership were clear both about the organization's struggles, as well as its solid reputation as a valued community coalition.

Sabatino's installation at HEBCAC comes at a critical juncture as the city, Hopkins, and East Baltimore Development Inc., a community development agency, are moving ahead with plans for a new 20-block Biotech Park and associated revitalization initiatives in the area.

"HEBCAC has a reemerging role," says Scot Spencer, the Casey Foundation's manager of Baltimore relations, who was invited by HEBCAC to oversee the transition process. The organization is now poised to ensure that residents and partners who have stuck around through the tough times, Spencer notes, "are educated, informed, and even active" as East Baltimore embraces its future.