

## EXECUTIVE TRANSITION PLANNING GUIDE

1. **Appoint a Search Committee.**
  - Appoint a balance of board members from different areas of expertise.
  - Advertise widely to ensure you have both local/and known applicants and unknown but potentially effective applicants outside of your region.
2. **Consider Strategic Planning Goals and Objectives.** Think about the coming year or two and where your priorities lie in terms of how you want your organization to operate and to grow. At minimum, **review your Comprehensive Plan, your Needs and Resources Assessment, and your Current Year Priority Goals** and consider:
  - If you are planning program growth, what leadership skills are important>?
  - If you are planning a fundraising campaign, what skills will be needed?
  - If you are trying to build your reputation and brand in your community, what kind of engagement skills and communication skills will be needed?
3. **Review and Edit Job Description.** Ensure job description reflects priority goals and also consider:
  - **Management and Operations.** Will your new Executive Director understand early childhood program development and basic nonprofit operations? Will he or she a solid background in managing resources through effective financial and budgeting practices? If you have staff, what key attributes will you want your candidate to demonstrate in terms of managing, supporting and growing your staff as you grow your organization?
  - **Fundraising and Marketing.** How will your new leader help your board with fundraising strategies such as individual donor program development or special events design and implementation?
  - **Board Relationships and Governance.** What interpersonal skills will your new leader need to help to maintain or grow your board and encourage healthy board/staff relationships?
  - **Leadership Style.** Do you want a strong leader who works independently? Are you looking for a leader who will share leadership and who knows how to delegate? Will your leader have good negotiation skills and the ability to communicate well in crisis?
4. **Determine Salary.** Use local salary surveys or SC First Steps salary analysis to ensure you are able to offer a competitive salary that attracts competent candidates.
5. **Begin Recruitment.**
6. **Screen Applications and Develop Interview Questions.**
7. **Use a score sheet to screen applications and to conduct interviews.** Score sheets can add objectivity and protect against litigation. Think about key competency areas and interview questions as you create your score sheets.
8. **Obtain Board Approval.** The Executive Search Committee should bring their recommendation for a final candidate to the board and seek approval with a majority vote.
9. **Make An Offer.**
10. **Create a CEO Transition Plan.**
  - How will you orient your new CEO?
  - How will you introduce new CEO to the community?
  - Will there be overlap and if so, how will the departing CEO help?
  - What objectives will you expect to be met within the first 90 days? Six months? First year?

- What level of supervision will be needed?
- What metrics will you use to measure performance?