

## **CAC LEADERSHIP TRANSITION PROCESS TIPS, THINGS TO CONSIDER**

### **Preparing for Posting the Position:**

- Ensure full Board has reached consensus about candidate priorities (characteristics, skill sets, experience, etc.) – *Be sure to ask what does the organization need in its leader NOW and in the years ahead- which might be different than what the organization needed during its prior hire(s)..*
- Establish a budget for the search and hire process
  - Will you accept out-of-state candidates and if so, are there funds available for candidate travel to participate in the interview process?
  - Are there resources to assist a candidate with re-location costs if that is necessary?
  - What about travel costs for the Search Committee to travel (if needed) to a central VA location to conduct interviews?
  - What about any costs associated with posting/advertising the position?
  - Are there funds available to allow for any overlap between the current Director and the new hire for purposes of orientation and training?
- Review/revise job description to ensure it is current and reflects the expectations of the position from this point forward (not what it may have been in the past).
- Explore potential impacts this change may have on other staff positions and on current staff members
- Identify vehicles for posting the position as well as process and timeline for accepting resumes.
- Encourage all Board members to actively participate in the search process by proactively “spreading the word” within their individual circles of influence about the opening (and encouraging those individuals they speak with to spread the word further...). Remember that the best candidates often come, not in response to a posted advertisement of the job, but by word of mouth. This is a unique position and some ideal candidates might not be out there looking or might not think they would be potential candidates for the position unless someone approaches them about it.
- Develop and alert the full Board to the process and timeline for:
  - Resume acceptance and review
  - Initial contacts with potential candidates
  - Follow up contacts/interviews
- Make sure the Search Committee and the Board Leadership are all clear and in support of the process and the assignment of responsibilities for resume review, candidate contacts, development of interview questions, participating in the interview(s) process, etc.
- Keep staff advised of all activities and plans throughout the process so there is not a lot of speculation. Ensuring they are in the loop about what the Board is doing and when will help ease the natural anxiety that comes with a significant transition like this.
- Keep the MDT and funders advised of the Board’s plan for the transition so they, too, can have confidence that the process is being handled responsibly, thoughtfully and strategically.

### **Interviewing/Assessing Candidates:**

- Consider a two (or possibly three) tier approach to the candidate review process. Perhaps first interviews with candidates that make it through the resume review process can be conducted by phone; then the top 3-5 candidates from this group might be interviewed in person on a preliminary basis and the final 1-3 candidates might be invited back for a final round of interviews.

- The final interview process – once candidates have been narrowed down to 1-3 – might include an *informal* meeting with the full Board (and perhaps CAC staff and/or MDT Partner Agency representatives as well) in conjunction with the actual interview process that would be conducted by the Committee. While the final recommendation is the authority of the Search or Executive Committee, this can provide others on the Board, staff and Team with greater confidence in the eventual decision because they have now met the individuals being seriously considered and been invited to provide feedback/input to the Committee about their observations, concerns, etc. Also, the Committee can gain valuable insights into a candidate by observing how the individual interacts with the Board, staff and Team.
- Consider including some questions in the interview process about the individual candidates' prior experience with organizational change and transition or personal experience they have had with change and transition. For example, "*What was challenging about the experience for them? What strategies did they employ or see employed that were successful?*" etc. Their response(s) might provide insight into whether the individual's approach to transition aligns with the plan in place for this particular organization.
- If applicable, be prepared to discuss the "overlap" time that the planned transition will offer with the outgoing Executive Director and ask for their thoughts, concerns, etc. about this game plan. What might they see as the benefits of the arrangement? What might they see as the challenges of the arrangement?

#### **Transition Period Following Hire:**

- Develop a list of key stakeholders that the new hire will need to be introduced to and a timeline for when and how those introductions should be made and by whom.
- If possible, consider having the outgoing Executive Director develop a calendar that reflects what routinely happens/activities the organization is engaged in on a month-by-month basis over the course of the year (i.e. MDT and board meetings, Board elections, staff evaluations, grant reports due, grant applications due, accreditation and funder site reviews, conferences, legislative activity, etc.). This often serves as a nice outline for initial orientation with a new hire and a great reference tool for after the retiring/exiting director is gone.
- The Board president should remain very accessible and available to meet regularly with the new hire to assess how the transition is going, if any adjustments need to be made, etc.
- MDT and CAC staff should also be advised about the transition plan and timeline as well so they know who to go to for what.