EXECUTIVE SEARCH AND TRANSITION

Replacing a high-level employee at a nonprofit can feel scary, whether it's a long foreseen change or a sudden shift. But it can be a great opportunity to move the organization forward toward its mission if the right candidate is identified and hired. Proper preparation is well worth your time, and while it may seem daunting, it's absolutely something you can navigate successfully.

Things to ask yourself before you leap into action:

1. What's the public story about the departure, and what's the real reason, if that's different? Is it positive, like the retirement of a long-term leader, or negative, due to financial or legal issues? That'll affect your internal and external communication.

2. Have you communicated with the current staff about the transition and how it will affect them?

3. Is there someone internal who's been groomed for the job, or someone on staff who *thinks* they're the obvious successor?

4. Should you open a national search, or can you find the right candidate closer to home?

5. Has the board decided who will take the lead on managing the search and transition, and whether you'll seek outside help?

6. Will the staff be involved in the selection process? Early clarity on their role, as well as clear communication throughout, will make for a better process.

7. How much do you have in the budget for salary and benefits? Is that a market-rate amount? Especially if you're replacing a founder or long-time employee, you may need to raise the salary to attract competitive candidates.

8. Do you have a budget for the search and transition? This may include job posting costs, interview expenses, travel for out-of-town candidates, relocation expenses and interim staff support.

9. Will this transition result in shifts of services, approaches or target audiences? If so, how will you communicate that, and what else needs to change?

Establishing answers to questions like those will facilitate a smooth process, with a minimum of surprises.

PHASES OF THE PROCESS

Development of job description

The job description communicates many things—the mission, values and culture of the organization as well as the expectations for the position. It's a great opportunity to sell the organization—its mission, impact, and its stability, as well as its goals for the future. It may also be a chance to rethink what's really important in the position now (rather than copy and pasting the old description), and the characteristics and personality traits best suited for the job and the organizational culture.

A note about listing compensation—the days of "salary dependent on experience" are over. If you've decided to hire for a position, you know how much you've budgeted already. It's fine to provide a range, and that ballpark will help applicants self-select while saving you time with applicants who are out of your price range. No matter how much the applicant wants to work for you, the salary is undeniably an important part of their decision, and making that an awkward secret is an obstacle to open communication. And please don't ask for a salary history—your position is worth what you're willing to pay for it, regardless of your candidate's previous compensation.

If you need more convincing, please check out Vu Le's wise words HERE:

nonprofitaf.com/2015/06/when-you-dont-disclose-salary-range-on-a-job-posting-a-unicorn-loses-its-wings/

Creation of hiring timeline

A thoughtful timeline allows everyone to plan for the transition. For the search committee, they'll understand the scope of their commitment and will be able to block out key dates for interviews and committee meetings. For staff, it will identify points where interim staff support may be needed, as well as a sense of how the transition will affect ongoing operations, given the learning curve for the new hire. And for candidates, they'll get a sense of the carefully thought-out way that your organization approaches significant decisions.

Recruiting a qualified, diverse field of applicants

Having a strong pool of candidates is crucial, although of course, all you really need is the one right applicant. Success comes from posting the position in the right places, coupled with targeted recruitment. It's standard boilerplate for job postings to advertise an "equal employment opportunity," but it's important to make that a reality. Working with someone with an understanding of the field and strong connections locally and nationally will be invaluable, as is presenting your organization as one that is welcoming to diversity.

Candidate communication

Communication starts with the job description, as well as confirming receipt of materials and answering questions about the organization, process and timeline. Sharing the materials with the appropriate parties while maintaining confidentiality is key. So is remembering that the evaluation process is a two-way street—at the same time you're looking at candidates, they're looking at you and deciding if your organization is a place they'll want to work, based on the way they're treated along the way.

Interview logistics

The process of screening and interviewing is a multi-stage process. Arranging Skype and in-person logistics, as well as any necessary travel, is another place where the needs of the organization and the candidate must be balanced. Having a conference room with Skype technology will be helpful, as well as private meeting rooms. Being thoughtful about who's involved in each stage, as well as the content and tone of the conversations, is another opportunity for the organization to communicate its own values at the same time it gains information about the candidates.

Sharing organization info with candidates

As the candidates consider the opportunity, they'll want to get a picture of the organization. While it's fair to expect them to do some homework, with information available on your website, on Guidestar and other sources, they'll also want access to non-public documents. Depending on the position you're hiring for, they may want to see annual reports, strategic plans, employee handbook, current financials. audits and budgets, organizational charts and more. Once they've studied this, they'll be better positioned to ask questions, and you'll learn a lot from the kind of questions each person asks.

Handling rejections

Talking to the applicants that are declined is one of the trickiest aspects of the search process, and unfortunately, one that is overlooked by many organizations. Applicants deserve to be treated with respect and care, and their handling sends a message about how the organization treats people that seek to get engaged. Even unqualified applicants deserve a polite "thanks but no thanks," and you never know how that person may intersect with your organization again, nor do you know who they'll talk to about you.

Making an offer

In many ways, this is the most delicate point of the process. Everyone's invested a lot of time, and the committee has decided, in consultation with other stakeholders, who they want for the position. Now it's time to finalize a salary offer, confirm benefits (including any relocation expenses), and set a start date. You may choose to handle the offer with a simple offer letter that spells out the terms, or you may want to generate an employment contract.

After the hire

The work's not done once the offer has been accepted. Communicating the news of the hire to key stakeholders, internal and external, allows the organization to communicate so much more than the name of the new person. And the new hire will need help developing a road map to success in the position, with the full support of staff, board and constituents. The first few months are crucial, and a thoughtless process here can make the previous months' work a waste of time and money.

FREQUENTLY ASKED QUESTIONS

Will it be expensive?

It doesn't have to be, and remember that whatever it costs, you're making an investment in the future of your organization. The wrong choice can be expensive in ways beyond dollars. The rule of thumb for the big search firms is frequently one quarter to one third of the position's first year salary, but there's a wide range of rates. Independent consultants tend to be cheaper, due to lower overhead, but they're likely to have fewer layers of staff to work with. You could hire a consultant or a firm to manage the entire process, or you could recruit help on smaller aspects, including targeted recruitment, résumé review, or overall process consultation.

Wouldn't it be easier to do it in-house?

You certainly can. There are lots of online resources (see below for a list), and if you have a clear idea of your goals for the search, the internal staff capacity to manage a confidential search, connections in your target field, and a search committee with HR experience, you'll be fine.

What resources can help prepare my organization for a transition?

START HERE for a fantastic overview, including steps that you can take before you're in a position to need a transition.

nonprofitquarterly.org/2008/03/21/boards-and-leadership-hires-how-to-get-it-right/

THIS RESOURCE includes various transition tools, including some useful templates. Also addresses the founder issue, and how to handle an emergency transition if necessary.

arts.texas.gov/resources/tools-for-results/leadership-transitions/

BRIDGESPAN offers more guidance on transition, including discussion of the merits of interim leadership, as well as managing the exit of the outgoing executive.

bridgespan.org/insights/library/leadership-development/nonprofit-ceo-transitions-resource-center

ARTS PROGRESS maintains a list of nonprofit job boards. Each site reaches a different audience and listing fees.

artsprogress.com/nonprofit-jobs/

And if you want to learn more about how Arts Progress can help with your search and transition process, visit us **HERE.**

artsprogress.com/executive-search/