

## How can Charitable Advisors support your Leadership Transition?

Thank you for exploring the possibility of Charitable Advisors assisting your organization in a leadership transition. Below is an outline of the typical search process and timeline and a menu of services that Charitable Advisors provides on a regular basis. We have found it is helpful for potential clients to have an idea of the costs involved – and often to see how affordable assistance can be during an executive transition – whether a planned retirement, unplanned executive departure for another position, or a board-initiated departure. The typical engagement is some combination of the services below. In central Indiana, Charitable Advisors can also assist in the identification of an Interim Executive Director.

Months in Process	Month 1	Month 2	Month 3	Month 4	Month 5
Define process and expectations of Search Committee/Members					
Establish Search Committee					
Search Committee Meetings	1	2 & 3		4 & 5	6 & 7
Organizational Assessment					
Engage major stakeholders					
Define organization priorities					
Define candidate characteristics					
Review compensation					
Define promotional strategies					
Draft Job Profile and Ads					
<b>Launch Search</b>		X	X		
Advertise position					
Promote position					
Build pool of candidates					
Screen resumes					
Search Committee Review					
Interview Questions/Process					
Interview Scheduling					
Interviews					
Rec to Board/Approval					
Offer					
Turndowns					

### **1) Job Posting in Not-for-Profit News**

\$175 for two weeks in Indpls Not-for-Profit News and up to 4 weeks on [www.NotforProfitNews.com](http://www.NotforProfitNews.com), or \$200 for two weeks in both the Indpls and Cincy Not-for-Profit News, also includes 4 weeks on website. Check out the inexpensive Screening Questions add-on to help you narrow candidates more quickly.

### **2) “Getting Organized” Working Session (\$500)**

When a leader resigns unexpectedly or is terminated with limited attention to next steps, it can be easy for board leadership to either rush into making micro-management or be uncertain about what to do next. Having an objective outside party who has been part of many transitions and is not caught up in the specific circumstance can help in bringing quick clarity to the situation.

### **3) Preparing/Launching Your Search (\$2,500-\$4,000) (Months 1-3 Focus)**

This front-end focused service is ideal if your organization has access to an HR function at your national office or with a host or partner organization that can handle resume administration, candidate communications, and interview scheduling. Another possibility is if a member of your search committee has experience and the group’s confidence in guiding the interviewing and selection process and keeping the timeline on track.

#### Prep

- Defining timeline and process with Search Committee
- Staffing initial, pre-launch Search Committee meetings – drafting agendas with Search Chair, attending meetings, scheduling, keeping process moving
- Brief organization assessment through interviews with select board and staff
- Supporting the search committee in gathering input from stakeholders
- Clarifying organization and candidate priorities, search timeline, and overall process
- Development of promotional strategies

#### Promotion

- Two week ads in Indy and Cincy NFP News and job board at [www.CharitableAdvisors.com](http://www.CharitableAdvisors.com)
- Position Announcement and weblink provided to staff and board for distribution through their channels
- Position Announcement and weblink distributed through CA social media channels
- Advertising placed with other websites or publication, per promotion plan – job ads billed separately to client.

#### Preliminary Resume Review

- Receipt and acknowledgement of applicant responses
- Initial screening/sort of all respondents based on your criteria into A, B, C categories
- Higher rated candidates information provided in electronic form for Search Committee review.
- Handing off to Search Committee once candidate pool is recruited and preliminarily screened.

#### **4) Executive Transition/Search Committee Support – (\$7-12,000)Full Process**

The departure of an ED/CEO is a major event in the life of a nonprofit, especially if that person has been a long-term leader. You may alternatively have a situation where there has been turnover or on-going problems in the leadership that need to be figured out before or as you recruit your next leader.

Bryan Orander of Charitable Advisors was the first consultant in Indiana to be trained in the Prepare/Pivot/Thrive model of Executive Transition Management that is used by the top transition consultants across the country. This level covers the full process, including :

- Up to 10-15 interviews with select board, staff, funders, and community partners
- Working session/retreat with full board to discuss and begin to prepare for executive retirement/transition
- Staffing the Search Committee through the full process (but not participating in interviews)
- Promoting the position, fielding inquiries from potential candidates
- Receiving and reviewing resumes
- 1-2 working sessions with staff management team
- Assessment Report with insights for Board and incoming CEO/Executive Director
- Development of initial priorities and ramp-up plan for incoming CEO/Executive Director
- Debrief with incoming CEO/Executive Director