



Executive Transition Services

When a successful, long-term Executive Director leaves an organization, the outgoing Executive Director and Board face significant stress.

Whether the organization is being run by a lame duck, an Interim Executive Director, or going through a period without executive leadership, it is challenging for the staff and board to do their job while simultaneously planning the transition.

Having gone through a well-planned transition at the Oregon League of Conservation Voters, and having closely observed several transitions that have not gone smoothly, I have developed three tools that I believe any organization should consider when a transition is possible, imminent, or underway.

The Preparatory Plan: If you are an Executive Director who thinks you are likely entering your final year as Executive Director, I can work with you as an Executive Coach to walk you through an audit process that will identify the most important steps you and your organization need to take before you announce your departure.

The Transition Plan: Once an Executive Director departure is announced, or if an Executive Director has left unexpectedly, I have developed a template for a Transition Plan, which covers everything from administrative systems, to personnel issues, to training the new Executive Director, to how to maximize fundraising from the transition. I can work with you through a series of steps to write the appropriate plan for your organization.

The ED Hiring Process: If you are a board that must manage an Executive Director hiring, one of the most critical questions you face is what to look for in a new Executive Director. I can help you make that assessment either by meeting with you directly, doing interviews, or an organizational assessment. I have also worked with organizations to identify the appropriate steps for an effective hiring process given their situation and timeline. If desired, I can also participate in the screening of applicants.

Fees for Executive Transition services will range significantly depending on the size and complexity of your organization, and your expectations for my involvement. In general, fees could range from as little as \$750 for a small organization seeking just limited involvement with low expectations for my time to as much as \$7,500 for a complex organization utilizing all of these services over several months.