

How can Charitable Advisors support your Leadership Transition?

We have found it is helpful to potential clients and Search Committees to have an idea of the costs involved – and often to see how budget-friendly assistance can be during an executive transition – whether a planned retirement, departure for another position, or board-initiated departure. Charitable Advisors can also assist in the identification of an Interim Executive Director. All of these services can be customized to your needs.

1) **Résumé Receipt and Position Promotion:** \$1,200-1,500

Organizations who use this service value the ability to take much of the administrative load off their staff or Search Committee members and the confidentiality that is offered compared to having resumes come into other staff members. There is also the assurance of working alongside someone who has done this many times before.

Key elements:

- Discuss candidate criteria with you so we can sort resumes and write job ad
- Post your job ad and create a special account in our on-line Applicant Tracking System with a link that you can promote through all channels.
- Two week ads in Indianapolis and/or Cincinnati *NFP News*
- Promotion through Charitable Advisors social media channels
- Receipt and acknowledgement of applicant responses
- Initial screening/sort of all resumes based on your criteria into A, B, C categories
- Assist with scheduling phone and/or in-person interviews
- 45 day access password to the applicant database
- Turndown e-mails to applicants not selected

2) **Search Committee Setup and Launch:** \$3,000-\$5,000 (Central IN, plus time & travel beyond)

Search committees are typically composed of very competent individuals who have interviewing and hiring experience. However, organizations often find it helpful to have assistance in “stepping back” to briefly review where the organization is and what will be needed from the next leader – especially if a long-term leader is leaving or there has been a series of short-tenured leaders.

You will receive a high level of personalized attention and we will work to really get to know your organization and circumstance:

- Brief organization assessment through 4-8 interviews with board and staff
- Short on-line survey of full board and staff
- Guiding search committee members in doing informational interviews with key stakeholders
- Defining the full search timeline and process with Search Committee, including: compensation, recruiting, Leadership Agenda, job description
- Notes from all Search Committee meetings prior to launching the search

3) Search Committee Staffing: \$3,000-\$5,000 (Central IN, plus time and travel beyond)

Building on either one of the services above or joining your Search Committee as you launch your search, we step into the role of facilitator, resource, and support to assist in final promotion, scheduling Search Committee meetings, interviews, briefing candidates, etc.

- Finalize timeline and process with Search Committee
- Staffing Search Committee – attending meetings, scheduling, keeping process moving
- 20-30 minute phone briefings with up to 12 candidates to help prepare them for first interviews
- Drafting phone and in-person interview questions
- Support in scheduling phone and in-person interviews
- Debriefing after interviews
- Strategizing around final candidates and offers
- Credit and Criminal History check for final candidate
- Use of Charitable Advisors Conference room for interviews, as needed (Fishers or Carmel)

4) Organizational Assessment and Executive Transition: \$8,000-\$12,000 (Central IN)

Perhaps you have a long-term leader retiring or leaving to pursue other opportunities. The board has limited experience with searches and/or there is a sense that staff members are very anxious or the organization has development needs to address before or during the search process.

This comprehensive level of service essentially combines all of the services above and may include a board or board/staff retreat and extra attention to the personal and emotional side of a leadership transition. In addition to services listed above, the process might also include:

- Increase to a total of 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
- 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

5) Identification of an Interim Executive Director \$1,250 (Limited to Central Indiana)

Whether you are a board member faced with a sudden resignation, an unexpected illness, or the difficult decision to fire an underperforming leader, you need to act quickly.

We are fortunate, in the central Indiana community, to have a number of former Executive Directors who make themselves available to serve as interim executive directors to bridge from one leader to the next. Typically, these executives bring their experience to serve you on a part-time schedule and focus on the internal operations of the organization and a few key relationships.

We will meet with several of your leaders to briefly assess where your organization is and what type of interim leader you need and then assist in quickly recruiting a person to fill that role. All interims work directly for your organization and are in no way affiliated with Charitable Advisors.