

Housecalls at Work

Answers from Dr. Insite

BY SHEILA L. MARGOLIS
AND AVA S. WILENSKY



Dr. Insite is an ongoing column to address people-related issues in nonprofit organizations. For answers to your workplace issues, please e-mail your questions to DrInsite@coreinsites.com. All responses will be handled confidentially.

DEAR DR. INSITE:

I am the current Board Chair for a thriving association that has been in existence for more than 25 years. Our success is due, in large part, to our excellent founding Executive Director. Sadly, he will be retiring. Without a staff member qualified to take over his position, what should our Board do to ensure a smooth transition and continued success?

DEAR BOARD CHAIR:

Leadership change is a stressful time for any organization. Without an "heir apparent" waiting in the wings, you must find someone from outside the organization to fill some very successful shoes.

The following steps can help in your Board's search for a new Director. You will need a formal search committee and possibly the support of a qualified consultant.

- **Identify the CORE Culture of your association.** Anyone who comes into your association will have to understand the personality and key attributes of your organization. Define your Purpose, distinctive Philosophy and core

values. This is essential to ensure that past successes and distinction will be sustained with future leadership.

- **Define the future Vision for your association.** Take time to consider what your retiring Executive Director and Board see as the future for your association. Yes, your new Director will have his/her own thoughts to contribute to it, but you must know your optimum aim to hire someone who will be able to take you there.
- **Develop a position description for the new Executive Director.** Analyze the outgoing Executive Director's job duties, knowledge, skills, and talents. Determine what gaps are present and will be needed by the new Director.
- **Create an interview guide.** Now that you have a clear picture of the position and the organization, you can develop an interview guide to use by your search committee. The guide will help you find a successful match based on your criteria.
- **Ensure successful leadership transition.** Ask the retiring Executive Director

to assist the new Director in understanding the culture and responsibilities of the association. This can be beneficial to both people involved. The retiring Director gets to "pass the baton" in a way that models the essence of the organization. The new Director receives the information from a tried and true source and is introduced to Board and staff in a collegial manner. If this is not the best avenue for you, have a Board leader orient and mentor the new Director for a smooth transition. 1

*Sheila L. Margolis and Ava S. Wilensky hold doctoral degrees in Human Resource Development. As the principals of CORE InSites® Inc., they are well-known organizational development experts specializing in organizational culture, strategy, the strategic use of human resources and program evaluation. Additionally, Margolis and Wilensky are part-time professors at Georgia State University and authors of *There Is No Place Like Work: Seven Leadership Insights for Creating a Workplace to Call Home* (2006). Call them at (404) 255-4007 or visit online at www.coreinsites.com.*