



New Chapter
COACHING, LLC

Exploring the Present, Transforming the Future

Change is Coming: Effectively Managing Your Next Executive Transition

Carolyn Sullivan, New Chapter Coaching

CAAP/DCED Annual Community Action Symposium

April 18, 2018

3 Elements of Succession Planning

1. _____
2. _____
3. _____

3 Most Important Executive Transition Management Questions

1. _____
2. _____
3. _____

6 Steps in Executive Transition Management Process

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

3 of the Roles of the Leadership Succession Team

1. _____
2. _____
3. _____

The Difference Between a Transition Consultant and an Executive Recruiter _____

4 Aspects of Transition Planning

1. _____
2. _____
3. _____
4. _____

3 of the Components of an Organizational Assessment

1. _____
2. _____
3. _____

3 of the 10 MO Community Action Director Core Competencies

1. _____
2. _____
3. _____

3 Elements of Onboarding

1. _____
2. _____
3. _____

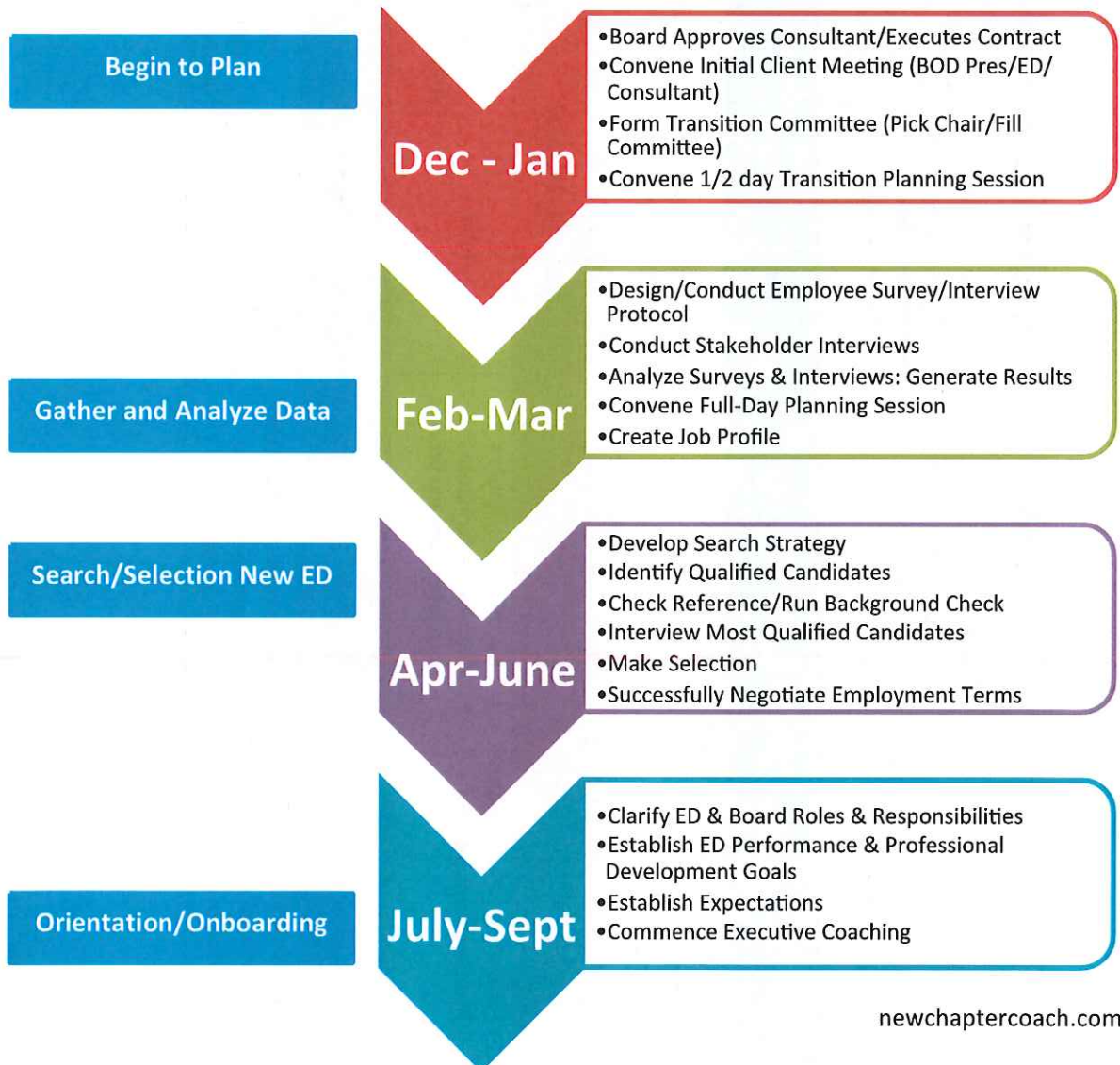
Overarching Purpose of a Leadership Visioning Retreat _____

One Way This Information Can Be Applied to Transitions of Other Management Team Members

Executive Transition Management Timeline:

Winter 2017- Summer 2018

Prepared by Carolyn Sullivan, New Chapter Coaching, LLC





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ABC Agency Transition Plan

Agency Goal/ Desired Outcome	Strategies	Resources Needed	Changes Required for Successful Implementation	Deadline	Lead Person for Action
Outcomes you are willing to hold yourselves accountable for	Intentional actions to be taken to achieve the desired outcome	Human, physical, financial and other resources needed to achieve strategies	New skills, structures, systems, culture, or mindset		
Operational Plan Element					
1. Fill Key Management Team Vacancy: Hire Finance Director	<ul style="list-style-type: none"> Review and revise job description Develop job posting Post in targeted outlets 	Funding for position and advertisement(s)	Budgeting/forecasting; benchmarking; preparation of dashboard	8/31/16	Interim ED
"Set the Table" Plan Element					
2. Strengthen Performance Management System	<ul style="list-style-type: none"> Revise job descriptions Improve performance evaluation tool and process 	Time	Change in culture to one that values accountability	6/30/17	COO
Search and Selection Plan Element					
3. Hire New ED/CEO: Design and implement search and selection process	See Transition Committee's Search & Selection Plan/Timeline	Budget amendment needed for search firm, relocation expenses, salary adjustment, etc.?	Improve trust & communication between board & staff	8/31/17	Board VP