



Board and Leadership Institute

What Comes First, the Strategic Plan or Hiring the Chief Executive or Chief Development Officer?

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DISCUSSION TOPICS

- Should you develop your strategic plan first and then hire your new CEO to implement it? Or should you hire the CEO and let them develop the plan?
- Should the new CEO have a particular set of skills, experiences and competencies to match the specifics of addressing your key strategic goals?
- Should your new Chief Development Officer develop your comprehensive development plan upon being hired? Or should you hire someone with the specific skills, experiences and competencies to implement a plan already in progress?
- Should your organization undergo an organizational assessment prior to hiring your next top executive? Or will it be obvious to your new CEO what your organizational strengths and areas of improvement are needed to be made?

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As a Nonprofit Leadership Coach, Dennis has advised hundreds of nonprofit organizations across the country on how to unlock their true potential by working with them to improve the integration of board governance, leadership development, strategic planning and philanthropy. He is a sought after motivational speaker, retreat facilitator, leadership coach, and executive search consultant.



CASE STUDY #1: MADISON BEHAVIORAL HEALTHCARE CENTER

Madison Behavioral Healthcare Center (MBHC) announces the hiring of their new CEO, M. Smith

M. Smith brings over ten years of senior leadership experience in behavioral health and comes highly recommended as an excellent leader with great experience overseeing programs and services.

MBHC plans to focus on recruiting new members to their board and increasing private donors and dollars in a major gift campaign initiative.

CASE STUDY #2: PACIFIC COAST ACADEMY

Pacific Coast Academy (PCA) Announces the hiring of J. Jones as their new Chief Development Officer

J. Jones has over ten years of fundraising and development experience in the college prep school industry and comes highly recommended by his former CEO.

PCA plans to switch to major gift fundraising and transition away from special events and grant writing.

CASE STUDY #1: MADISON BEHAVIORAL HEALTHCARE CENTER

- MBHC UPDATED THE FORMER CEO JOB DESCRIPTION AND BEGAN RECRUITING IMMEDIATELY
- CANDIDATES WERE SCREENED AND INTERVIEWED BASED ON THEIR MATCH TO THE JOB DESCRIPTION REQUIREMENTS
- M. JONES WAS HIRED BASED ON INTERVIEW SKILLS AND HOW WELL PRIOR EXPERIENCE MATCHED THE JOB DESCRIPTION

CASE STUDY #2: PACIFIC COAST ACADEMY

- PCA DEVELOPED A COMPREHENSIVE FUNDRAISING PLAN OF ACTION TO IDENTIFY HOW TO SECURE THE FINANCIAL RESOURCES TO IMPLEMENT THE ACADEMY'S NEW STRATEGIC PLAN
- A NEW IDEAL JOB PROFILE WAS CREATED TO REFLECT THE COMPETENCIES NEEDED TO IMPLEMENT THE FUNDRAISING PLAN
- CANDIDATES FOR THE CHIEF DEVELOPMENT OFFICER POSITION WERE SCREENED AND INTERVIEWED BASED ON THE SPECIFIC SKILLS, EXPERIENCES AND COMPETENCIES REQUIRED OF THE NEWLY CREATED IDEAL JOB PROFILE
- J. JONES WAS HIRED BASED ON BEING THE BEST MATCH TO THE NEW IDEAL JOB PROFILE AND EXPERIENCE IN CULTIVATING AND SOLICITING MAJOR GIFTS

ONE YEAR LATER...

- MBHC HAS STRUGGLED A BIT MORE THAN THEY EXPECTED TO MAINTAIN A POSITIVE FINANCIAL PERFORMANCE AND THEY HAVE NOT TRANSITIONED WELL TO CULTIVATING AND SOLICITING PRIVATE SOURCES OF FUNDING.
- AFTER RECRUITING ONE NEW MEMBER WITHIN THE FIRST SIX MONTHS OF M. SMITH BECOMING THE CEO, BOARD DEVELOPMENT HAS ALSO NOT MET EXPECTATIONS.
- M. SMITH RECEIVES A GOOD PERFORMANCE REVIEW IN YEAR ONE BUT DEVELOPS A NEGATIVE ATTITUDE TOWARDS WORKING AT MBHC IN YEAR TWO AND BEGINS TO LOOK FOR ANOTHER JOB
- M. SMITH RESIGNS AFTER BEING ON THE JOB LESS THAN 3 YEARS

ONE YEAR LATER...

- PCA HAS MADE GREAT PROGRESS IN TRANSITIONING FROM SPECIAL EVENTS AND GRANT WRITING TO MAJOR GIFTS
- J. JONES HAS BROUGHT THE RIGHT EXPERIENCE AND SKILL SETS TO EDUCATE AND MOTIVATE THE BOARD TO PARTICIPATE IN THE PROCESS
- J. JONES IS HAPPY IN WORKING AT PCA, IS RECEIVING STELLAR PERFORMANCE REVIEWS AND WAS PAID A NICE BONUS

**RECRUITING NEW CANDIDATES FOR YOUR ORGANIZATION IS A GREAT
OPPORTUNITY TO:**

TAKE A FRESH SELF ASSESSMENT

SEEK NEW IDEAS

PROVIDE NEW ENERGY

CREATE A NEW VISION

SET NEW GOALS

QUESTIONS ABOUT YOUR ORGANIZATION TO CONSIDER:

- Does your current vision statement still excite your stakeholders?
- Is it still a realistic, credible and attractive future for your organization?
- What achievements in the past two years are you most proud of?
- What are your biggest disappointments during this time?
- How well do you communicate your achievements – the positive social impact you are making in the community?
- What are your major internal obstacles to success?
- How does your organization measure success? Your Board?
- What makes you distinctive from similar organizations?
- Did your number of donors and new dollars increase this past year?
- How well do you retain current donors?
- How engaged and motivated is your board?

WHAT COMES FIRST, THE CHICKEN OR THE EGG?

**WHAT SKILLS, EXPERIENCES AND COMPETENCIES DOES YOUR NEXT CEO
NEED TO HAVE TO PERFORM AT THE HIGHEST LEVEL?**

VISIONARY THINKER?

RELATIONSHIP BUILDER?

SOCIAL ENTREPRENEUR?

BRAND BUILDER?

COLLABORATOR?

INSPIRATIONAL MOTIVATOR?

**WHAT SKILLS, EXPERIENCES AND COMPETENCIES DOES YOUR NEXT
CEO NEED TO HAVE TO PERFORM AT THE HIGHEST LEVEL?**

MAJOR GIFTS EXPERIENCE?

DONOR RELATIONS?

CULTIVATION SKILLS?

BOARD ENGAGEMENT?

TEAM MOTIVATOR?

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**INVEST THE TIME TO IDENTIFY THE IDEAL POSITION PROFILE PRIOR TO
HIRING YOUR NEXT EXECUTIVE**

QUESTIONS?

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Books by Dennis C. Miller:

