NSI NONPROFIT SUSTAINABILITY INITIATIVE

EXECUTIVE TRANSITION

VETTING CONSULTANTS

Interviewing a Consultant

Ask consultant:

- What is their area of expertise? (Transition preparation and board development, recruitment, coaching and onboarding)
- What is their process? How hands-on and collaborative, or autonomously do they work? How often can you expect to hear from them throughout the process? How much staff time should your organization plan to dedicate to the process?
- If it's a firm with multiple consultants, who will be your primary contact?
- What is their perspective on the appropriate use of interim executives?
- Does the consultant have a track record in working with similar organizations? *(Ask for a list of recent searches / past clients)*
- Do they understand your mission and culture sufficiently / demonstrate cultural competency?
- If your candidate pool is mostly local, does the consultant have familiarity with the region?
- Is the consultant a member of the Network of Nonprofit Search Consultants?
- What is an appropriate amount for transition budget? When would payments be expected?
- How do they define a successful transition?
- Do they offer a guarantee? Do they have an "off-limits" policy?

Did consultant ask about:

- History of prior transitions at the organization
- Organizational culture
- Board/staff alignment regarding leadership needed
- Search committee and board involvement

VETTING CONSULTANTS, CONT.

Scope of Work

Does it include:

- Clearly defined deliverables
- Execution timeline
- Organizational audit/assessment phase prior to recruitment
- Review/revision of job description
- Change management work

Inquiring with References

- Do past clients believe the scope of work was realistic?
- Do past clients feel the services were culturally competent?
- Why did the client choose to work with this consultant over others?
- Was the consultant available and communicative?
- What do they wish the consultant had done differently?