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gay, bisexual
& transgender
community of
San Diego County
since 1972.

Executive Summary of The San Diego LGBT Community Center Leadership Transition and Search Plan - July 2017- June 2018

(All dates given are best approximations of time periods. Dates and details are subject to change as a function of any unexpected execution challenges.)

Goals:

1. The Center's Board of Directors will **conduct a search and will select** the best candidate for the next executive of The San Diego LGBT Community Center.
2. Board of Directors will conduct a thoughtful, thorough and robust search process that includes a number of opportunities for community, staff, stakeholder, and funder input.
3. **There will be many opportunities for community and stakeholder input early in the process to ensure community input has the maximum impact before beginning the actual search process.**
4. **One single, uniform, standardized process for all candidates** – While there are many opportunities for community input, all candidates will be subject to the same processes. Once the recruitment and application period opens, all applications will be sent to the search consultant, who will forward to the search committee for determination. The final decision will be made by the Board of Directors.
5. Board of Directors will conduct as transparent a process as is possible, while protecting all participants' privacy (as in all employment processes).
6. At every phase in the process and with each milestone, The Center will communicate outward to the community that a step in the process is completed.
7. Questions regarding the search process will be sent to the search consultant and/or the board co-chair leading the search process – Joyce Rowland at board@thecentersd.org.

The search and selection process proceeds across five (5) phases.

1. Thoughtful Preparation and Community Input
2. Recruitment
3. Interviews and Selection
4. Community Communication
5. Leadership Transition

Phase One: Thoughtful Preparation & Community Input (July 2017 to November 2017)

1. **(Completed)** Communicate to the community the pending transition as early as is possible.
2. **(Completed)** Board of Directors will review and edit the existing Leadership Transition Plan.
3. **(Completed)** Board of Directors will select **Search Consultant/Search Firm**
 - a. Criteria for hire will include experience with successful searches for LGBTQ movement executives, successful experience forming diverse applicant pools, successful experience with searches for health and human service agencies
Selected: McCormack+Kristol.
4. **(Completed)** Board of Directors will form a **Search Committee** who will consist of selected board members and may contain some outside experts, if needed

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The search committee is chaired by Center Board co-chair G. Joyce Rowland and will also include: Gil Cabrera, Joanna Clark, Kafele Khalfani, Lisa Nicole Sanders, Shaun Travers, Andrea Villa, and Dale Kelly Bankhead.

5. **(Completed)** Board of Directors (including the Search Committee and the Search Consultant) will begin a review of the **Candidate Qualifications** (education, skills, experiences, values and vision, etc.) that they wish to use to form the **Position Description and Qualifications**
 - a. **(Completed)**. More than 200 community members participated and provided feedback regarding what skills, qualities and characteristics they would like the board to consider in the next executive director for the San Diego LGBT Community Center. Feedback was offered from community members, clients, donors, partner organizations, former board members, volunteers and staff members in 1:1 phone interviews, small groups, and surveys.
This review included robust and inclusive **Community input opportunities**. For example, a variety of telephone interviews of community members/groups, and/or small, diverse focus groups of community members, volunteers, funders and staff members gathered input regarding opinions on candidate criterion. Additionally, broad distribution community surveys was utilized to allow additional opportunities for input
6. **(Completed)** The Board of Directors, Search Committee and the Search Consultant will **create a Final Position Description and Qualifications** for the search that includes the criteria for successful candidates and the required supporting materials
7. **(Completed)** When this phase is completed the Board will **communicate** this progress to the community and to stakeholders

Phase One is now complete.

Phase Two: Recruitment (November 2017 – December 2017)

All applications, inquiries, and questions should be sent to <http://mccormackkristel.com>.

1. **(Completed)** The Search Consultant, Search Committee, and the Board of Directors will communicate to the community and all recruitment networks that there will be one single, uniform, standardized process for all candidates. All candidates will be subject to the same processes. Once recruitment and application period opens, all applications will be sent to the search consultant, who will forward to the search committee for determination. The final decision will be made by the board of directors.
2. **(Completed)** The Search Consultant, Search Committee, and the Board of Directors will generate a list of potential recruitment networks.
3. **(Completed)** The Search Consultant and Board of Directors will **open recruitment**
4. **(Completed)** The Search Consultant and Board of Directors will **communicate** the opening and posting of Recruitment Announcements to the community and stakeholders and will contact key recruitment networks to circulate the announcement.

Phase Two is now complete.

Phase Three: Interviews and Selection (December 2017 – March 2018)

1. **(Completed)** As the Search Consultant and Search Committee and Board of Directors communicate the opening of recruitment, they will also communicate to the community that this portion of the process is an employment process that does include some privacy protections for candidates, as all employment processes do.

2. **(Completed)** The Search Consultant will begin to receive candidate materials and applications for the Search Committee
 - a. **All materials and applications will be sent to the identified Search Consultant**
 - b. All candidates will use this one, identified process.
3. **(Completed)** The Search Committee and Search Consultant will **Review Applications and Materials**
4. **(Completed)** The Search Committee and Search Consultant will select candidates for **First Interview** and formulate the standardized interview questions.
5. **(Completed)** The Search Consultant will **conduct First Interviews**.
6. **(Completed)** The Search Committee and Search Consultant will select from first interview results the candidates who will receive a **Second Interview**.
7. **(Completed)** The Search Committee and Search Consultant will **conduct Second Interviews**
8. **(Completed)** The Search Committee and Search Consultant will select from second interview results the candidates that will receive a **Final Candidates Interview**
 - a. The list of final candidates will likely include 2 or 3 candidates
 - b. Prior to the Final Candidates Interview, references will be checked and background checks conducted
9. **(Completed)** The Board of Directors will conduct a **Final Interview**
10. **(Completed)** Following the completion of all final interviews, the full Board of Directors will meet, fully discuss and vote upon their **Final Selected Candidate**
11. **(Completed)** Following identification of a selected candidate, the candidate and the executive committee will begin negotiation of hire details including potential start date(s)
12. **(Completed)** Once the candidate has been selected and all negotiations for hire have been completed, the Board of Directors will begin **communicate** to the community and stakeholders and to announce the new executive.

Phase Three is now complete.

Phase Four: Community Communication, Introductions and Meetings (April 2018)

At the completion of negotiations that result in a new executive, the Board of Directors will begin to notify the community, stakeholders, staff members and funders about the incoming executive, including biographical information, start date, etc. The announcement statements will be followed by planning and executing a series of calls, introductions and meetings for the incoming executive.

Phase Four has begun.

Phase Five: 90-Day Leadership Transition (April 2018 – June 2018)

1. To ensure a smooth transition, before the new executive begins July 01, 2018, a **90-day transition work plan** will be executed. This work plan will be formed and supported in its execution by the board executive committee and will include the current CEO serving to acquaint the incoming executive with internal agency operations, programs, existing policies and procedures, etc.
 - a. This process will be accompanied by a series of calls, meetings and events to introduce the incoming executive to the community including but not limited to – staff members, volunteers, community organizations, diverse community groups, stakeholders and donors, other agency funders, elected and appointed officials.

Once the above 90-day work plan has been completed the exiting executive will then leave the agency June 30, 2018 and the new executive will begin in their role. Once this exit has been completed, agency communications will **communicate** to the community and stakeholders that the full transition has been completed and the new executive is in place. It is possible, if this timeline is delayed or disrupted, that the existing executive may be available to the new executive, for a limited time, for additional consultation.