

Developing a Working Agreement and Success Benchmarks

Building a strong partnership between the Board and the new Executive Director (ED) is critically important to the success of a leadership transition. The Board Chair should meet with the ED during his/her first two weeks to develop a working agreement on how they will communicate and work effectively as a team, to identify first year success benchmarks, and to discuss the supports the ED will need to carry out his/her work effectively, as well as the process evaluating his/her performance.

The working agreement should clarify how the board and ED communicate, coordinate efforts, and their respective decision-making roles and responsibilities. Additionally, articulating first year success benchmarks can help the ED to understand organizational priorities and needs and can serve as a guidepost for his/her first year. The following sample an example of first year success benchmarks.

First Year Success Benchmarks Sample

The Executive Director will be expected to achieve the following benchmarks by the end of the first year:

- **Fundraising**
 - Build rapport with, and maintain all current funders.
 - Raise sufficient funds to meet the 2012 budget.
 - Raise \$125,000+ from the upcoming fundraising event.
 - Create a multi-year diversified fund development plan.
 - Maintain all timely grant-writing and reporting obligations.
- **Vision / Strategic Plan**
 - Articulate a cogent and compelling vision for the organization, as well as a strategic action plan.
- **Media**
 - Develop a strategic communications strategy.
- **Coalition / Collaborative Plan**
 - Successfully lead our collaborative partnership and ensure that deliverables are met within the specified 2-year work plan.
- **Management**
 - Develop and implement an annual operating plan encompassing all aspects of the organization's functioning (e.g., campaigns and programs, strategic communications, financial management, fundraising, staff retention and development, member leadership development, external relations, collaborative agreements, etc.)