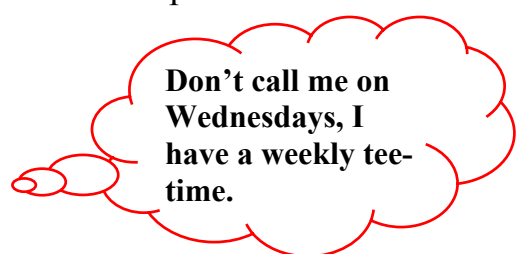


The Dialogue

Fifteen questions to dialog between **incoming president** and **chief staff executive**.

The Relationship

1. **Expectations** - What can the president anticipate for support from staff? What can staff expect from the president in the spirit of teamwork and accessibility?
2. **Outcomes** – What do you wish to achieve during your term of office? Are there two or three things that will mark your term's legacy?
3. **Barriers** - Do any limitations, surprises or hidden agendas exist? Is there anything we really need to address to ensure understanding of each other?
4. **Communications** - What is the preference for staying in touch; how frequently? Are e-mails with attachments OK? Do you want to schedule a consistent call time? Do we need to meet in person; at whose office?
5. **Spokesperson** – Who will serve as primary spokesperson? Is the president comfortable with knowledge of organizational history, milestones and goals for speaking purposes?
6. **Calendars** - Are there some days, weeks or months that should be avoided? What about vacations and holidays of the president and executive director?
7. **Partnering** - How can we work together to best serve the organization? One or two ideas each.
8. **Recognitions** – During the year, awards and recognitions are important. What ideas do you have to recognize volunteer and staff excellence?

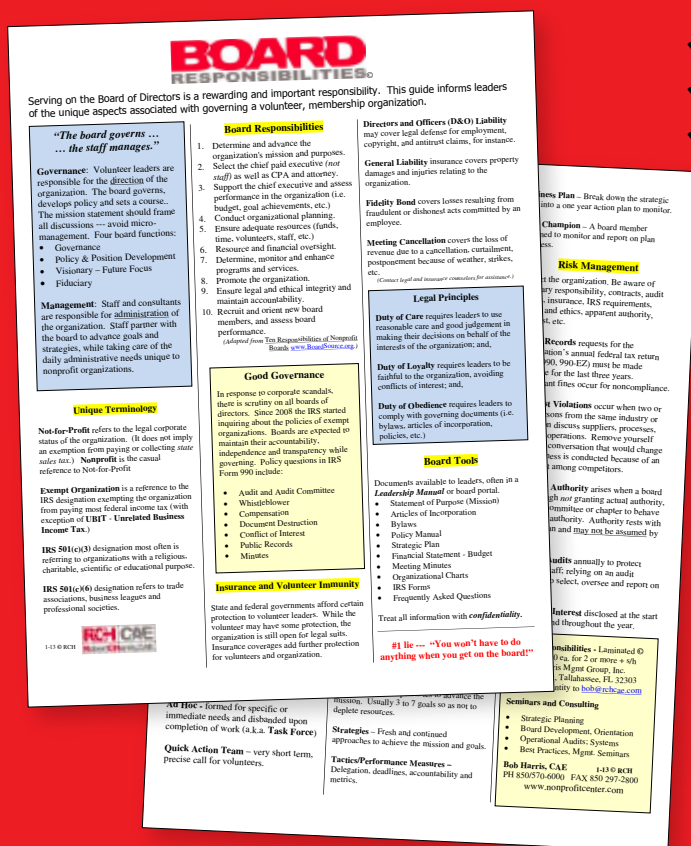
A red-outlined cloud-shaped speech bubble with a tail pointing towards the left, containing the text 'Don't call me on Wednesdays, I have a weekly tee-time.'

Don't call me on
Wednesdays, I
have a weekly tee-
time.

Continued.....

Revised 2013

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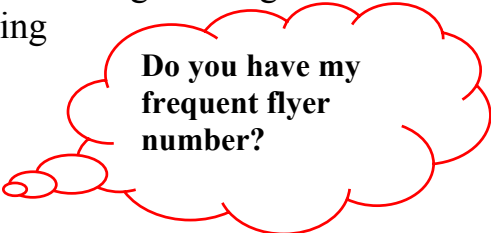
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Name	Organization		
Street Address	City	State	Zip
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EMAIL bob@rchcae.com for more info on strategic planning, board seminars and staff training

About The Organization

9. **Committees** - Who appoints committee chairs, vice chairs; and charges them with work? Are committees expected to keep minutes? Will there be committee liaisons from the board and staff?
10. **Performance** – A performance review of the executive director should measure nonprofit management skills. How will the review be conducted? Will the president conduct a *review of the board's performance*?
11. **Leadership Development** - What type of orientation or board retreat is planned? How will you focus on future leader identification and development?
12. **Strategic Plan** – Will the strategic plan be *the* primary guide for board, staff and committees? When does the plan need to be updated?
13. **Agendas and Meetings** – How involved is the president in setting meeting agendas? Are there special expectations or needs regarding meeting sites and set-up?
14. **Travel** - What expectations are there for travel? What is already scheduled? How are reservations handled? What about travel preferences?
15. **Finances and Budgeting** – Are budget line items understood, as well as the organization's financial policies? What process will be used to draft the next budget, and when will it start? Is the president reimbursed for expenses? Is the audit process understood?



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