



FINAL CONSULTING REPORT
LONG-TERM AND EMERGENCY SUCCESSION PLAN

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INTRODUCTION

Over the past 28 years, Boston City Singers has been intertwined in communities of underserved youth in Boston by providing the highest level of creative youth development through the music of various genres. Boston City Singers has had strong leadership that has helped drive the expansion of the organization from its start in a home kitchen to current times, with a staff of three full-time members and numerous part-time staff, volunteers, and supporters. Recently, within the past six months, it has become apparent to stakeholders of the organization that the full-time leaders do not currently have successors for their future departures. This issue sparked the initial outreach to Boston University's Arts Administration Consulting course, hoping to understand the intricate pieces that are in both a long-term succession plan and an emergency succession plan.

RESEARCH GOALS

Following receiving this initial proposal from Boston City Singers and meeting with the staff and select board members to better understand the needs and goals of these succession plans, we have developed a few points of discovery that helped influence the plan as a whole:

- What are the current techniques for succession planning?
- What is the average planned and emergency succession plan timelines?
- What are the proper arts leadership hiring practices?
- How would the organizational structure look if roles and duties were rearranged to better suit the organization's future growth?

METHODOLOGY

To elaborate on the questions that we posed based on the proposal, we needed to conduct desk research and interviews.

The desk research included gathering current arts values, policies, and hiring practices from multiple art genres; analyzing similar arts organizations and their structures; and reviewing and collecting different-formatted succession plans for both the long-term and emergency succession outlines.

Our comparative analysis between Boston City Singers and other similar organizations both in and outside of Boston included how organizations outreach and engage with the communities, types of programming, and marketing techniques that help expand the organization. Gathering current arts values, policies, and hiring practices included analyzing job descriptions of the Boston City Singers and other organizations, proper equity, diversity, and inclusion systems, effective and lawful interview processes, and questions; and identifying recruiting systems and companies. Multiple reviews of succession plans included types of succession plans of organizations of all sizes, institutional knowledge retention plans, standards and metrics of employment development, and effective succession transitions.

The consulting group interviewed multiple individuals who influenced the organization. Through these interviews, we were able to gather information based on the needs and wants of the succession plans, information about the organization, and what the future of the organization could look like.

We interviewed the following individuals:

- Melissa J. Graham, Managing Director
- Jane Money, Founding Artistic Director
- Emma Greenough, Program Manager
- Jaap van Reijendam, Board of Directors Member, Chair
- Joseph Burnieika, Board of Directors Member, Vice-Chair
- Jack Wu, Board of Directors Member

For each interview, we gathered information using the following questions:

Board Interview Questions:

- How long has each member been on the board and/or involved with the organization?
- For Vice-Chair Burnieika): What is your history with succession planning?
- Do you have any input for the succession planning process?
- What is your preferred timeline for this process?
- How would you feel about creating a co-artistic director position?
- What would you like to have for an outcome for this process?
- What is your vision for the future of this organization?

Full-Time Staff Member Questions (Ms. Greenough):

- How did you find the position you are currently holding?
- What was the hiring process?
- Did the job description accurately reflect what you do daily?
- What is the role of the Part-Time staff members?
- What are some of the Boston City Singers' greatest successes?
- What are some of the organization's challenges?
- What are some fundraising efforts that BCS has undertaken?
- What would you like to have for an outcome for this process?

Executive Staff Questions:



- How did Jane start the organization?
- Why did you bring Melissa on board and what did that process look like?
- What is the process for hiring the rest of the team (Part-Time instructors, Asst. Artistic Director, other support staff)? What qualifications do you look for?
- What are some of the organization's goals for the next 3-5 years?
- What conversations have you had surrounding succession planning?
- What is your desired outcome/ideal situation for the succession plan?

PREVIOUS SWOT ANALYSIS BY CCT

One of the primary tools of our research was the SWOT analysis below that was conducted by CCT. The SWOT provided us with the information that we needed in order to structure our recommendations and build a succession plan that we felt would strengthen the organization as a whole, not just provide a timeline for new leadership to enter Boston City Singers. The elements that stood out to us the most are as follows:

- Weaknesses and Threats:
 - Team structure: Boston City Singers may need to prioritize a restructuring of the organization because of its internal systems, inconsistent communication, and understaffing.
 - Marketing: This is found under both weaknesses and opportunities, which highlights that the organization needs to spend some time re-strategizing their marketing tools, which will in turn help bring the community back to the size it was before the 2020 pandemic.
 - Diversity and connection to community: Another weakness and opportunity for the organization, with a change of leadership comes the opportunity to change the way the organization looks internally so that it matches the community that it serves. It is essential for organizations to focus on including as many facets of diversity, equity, and inclusion in their programming and policies.
 - Development: Currently, Boston City Singers does not have a development team. It has not majorly hindered the organization yet, but as the SWOT highlights, this is both a weakness and an opportunity. The lack of foundation funding could be a threat to the organization and therefore should be a priority to strengthen the organization's future programs.
 - Succession plan: This is the biggest priority of this proposal, since that was the original request from Boston City Singers.

Summary SWOT	
<p style="text-align: center;"><i>Strengths</i></p> <ul style="list-style-type: none">• Musical expertise• Demanding, but enjoyable• Well-connected to their neighborhood• Lean, efficient, flexible, nimble• Overseas trips• Staff dedicated to serving children	<p style="text-align: center;"><i>Weaknesses</i></p> <ul style="list-style-type: none">• Overall marketing plan and execution• Inconsistent communication, internal & external• Well-connected to their neighborhood• Board structure/make-up• Understaffed• Non-foundation fundraising• Lack of family connection
<p style="text-align: center;"><i>Opportunities</i></p> <ul style="list-style-type: none">• Structured marketing program• Strengthen communications to families• Articulate mission and brand• Diversify Board• Funding through increased fees, corporations and events• Seek more long-term collaborations/partnerships• Clear curriculum with expectations and tools for achievement	<p style="text-align: center;"><i>Threats</i></p> <ul style="list-style-type: none">• Internal systems• Lack of succession plan• Confusion between two choruses (Boston City Singers vs Boston Children's Chorus) - lack of positioning and differentiation

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SIMILAR ORGANIZATIONS AND COMPETITORS

In order to understand where Boston City Singers fits into the landscape of children's choruses in Boston, we conducted a brief investigation into the organization's competitors. We did this so that we could identify what makes other, larger, organizations successful to provide Boston City Singers with tools and examples of how they can grow the organization back to pre-COVID numbers. Using the SWOT analysis provided by CCT, we highlighted a few elements based on the organization's weaknesses and opportunities, namely the size and diversity of the teams, marketing plans and team structures, and their visible hiring strategies (i.e., job postings and descriptions).

- **Boston Children's Chorus**

- Hiring Platforms: Indeed, Glassdoor, LinkedIn, MA Hire Culture & Other Forums.
- Number of Board Members: 19
- Total Staff: 35
- DEI Commitment based on Current Demographics: 15 (BIPOC / LGBTQ / Latinx)
- Marketing Team Size: 1 – Marketing Associate

- **Boston Youth Symphony Orchestra**

- Hiring Platforms: Indeed, Glassdoor, LinkedIn, MA Hire Culture & Other Forums.
- Number of Board Members: 23
- Total Staff: 25
- DEI Commitment based on Current Demographics: 3 (BIPOC / LGBTQ / Latinx)
- Marketing Team Size: 1 – Marketing Director

- **Zumix**

- Hiring platform – Indeed, LinkedIn, MA Hire Culture & Other Forums.
- Number of Board Members: 14
- Total Staff: 25
- DEI Commitment based on Current Demographics: 11 (BIPOC / LGBTQ / Latinx)
- Marketing Team Size: None

OVERVIEW OF RECOMMENDATIONS

Based on the research conducted and outlined above, interviews with board members and full-time staff, and other organizational documentation, we have prepared the following recommendations for Boston City Singers:

1. Organizational Restructuring and Advancement
2. Arts Hiring Practices
3. Building a Succession Planning Strategy

RECOMMENDATION #1

Organizational Restructuring and Advancement

In order to advance the Boston City Singers, changes within the organizational structure are recommended. During our interview and research process, we found that this is a large consideration that we would recommend to the organization and is a strategy for growth for Boston City Singers. In referencing the reason behind our assessment for an organizational restructuring, one of the threats indicated in the SWOT analysis from CCT was that of internal systems.

Charitable Allies defines internal system restructuring as: *“when an organization is trying to establish a larger foundation for future growth, or significantly change the way it operates its governance or its programs, then restructuring is in order. This commonly involves changing the board governance (committees, meeting frequency, etc.), eliminating program lines, adding program lines, or adding subsidiary or affiliate entities. Most of these changes require amendments to the organization’s bylaws, and may also require filings with the secretary of state, attorney general, Internal Revenue Service or other regulators.”*

With potential changes in executive leadership in the coming years, it is an ideal time for the board and staff to address this issue of organizational growth. Vikki C. Lassiter in *The Role of Process Improvement in the Nonprofit Organization* defines organizational growth as, *“a process that occurs by adding new content and organizing old content. When organizations are attempting to grow, develop and keep pace with a changing marketplace, successful outcomes often require an ongoing process that alters the way people interact with the external forces, perform their jobs, and relate to each other.”* The chart on page 12 outlines our recommended organizational structure.

Receiving a large grant and potential for leadership change within Boston City Singers is a pivotal moment for the organization. The following quote from La Piana Consulting strengthens our argument for change through succession planning: *“internal restructuring may be key to keeping your organization fresh, effective, and successful in these times of great challenge and change.”*

Creating a new Marketing and Development Director position

In our research and interviews, we discovered that senior staff are performing many tasks, most importantly those that involve marketing and development, that could be relegated to other positions within the organization. An example of this is in the Artistic Director position’s original job description, which lists grant writing and oversight of social media, tasks that will be performed by a single individual in our recommended plan. Therefore, we recommend that you create at least one new full-time position, a Marketing and Development Director.

This position would report directly to the Managing Director and would take some of the responsibilities regarding those fields away from the current Managing Director’s many roles as

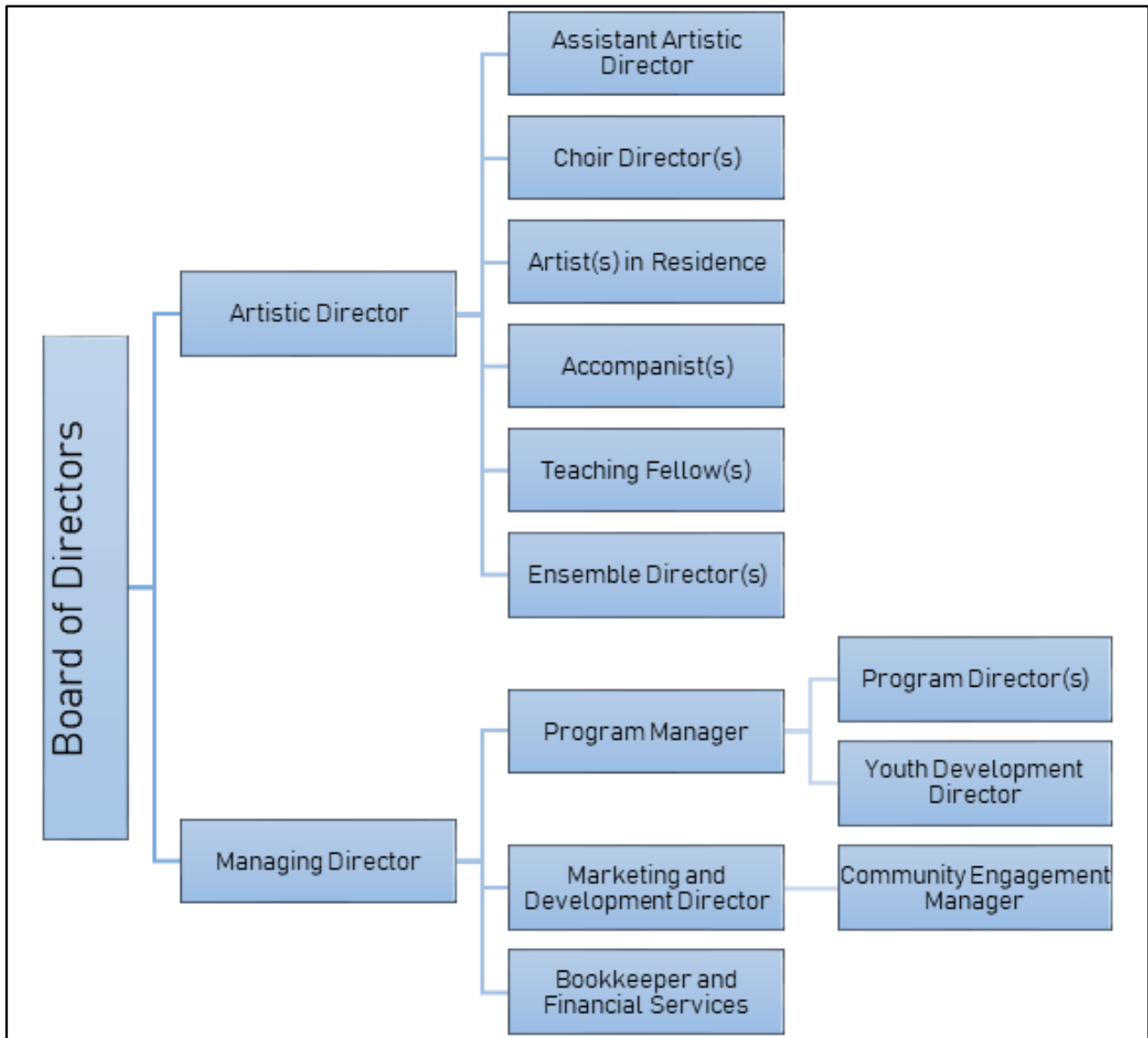
you can see in the job description posted in **Appendix 1**. This position is an important aspect of the future of Boston City Singers and will create a cultivation component that is the sole responsibility of a full-time employee and will help executive level staff focus on their primary responsibilities.

Boston City Singers has an invaluable opportunity to invest in the creation of a development position by using some of the funds from the last large grant you received. This position will eventually fund itself since the organization will now have the avenues for consistent foundational funding and campaigns to raise individual donations. By taking the step to build a new full-time position, Boston City Singers can focus more intentionally on rebuilding their community back to pre-COVID numbers and allow staff to enjoy a better distribution of responsibilities.

Below are some key areas that can benefit from change to your organizational structure due to the new position:

- **Growth in Marketing:** In the SWOT analysis from CCT, the marketing program was listed as both an opportunity as well as a weakness. A new position would be created to take advantage of these opportunities and to address the weakness. In addition, during our interviews, we found that obtaining a growth to reach pre-COVID-19 levels was a concern and marketing to new audiences will assist in that reach. This component would focus on *“the creation, production, and distribution of all marketing materials such as press releases, newsletters, and print and digital publications,”* as referenced in the job description.
- **Growth in Development:** In addition to growth in marketing, the new position would create a development opportunity for the organization. This aspect, based on the included job description, would focus on *“writing and securing general operating and capacity building grants”* as well as *“major gifts and planned giving programs, including identification of prospects, cultivation, solicitation and stewardship of donors.”*

Organizational Structure Recommendation:



RECOMMENDATION #2

Arts Hiring Practices

The following information is recommended for Boston City Singers to implement to help standardize the organization's hiring practices. By creating a standard hiring process, it helps reduce bias in the hiring environment and ensures that all candidates are reviewed fairly and equally.

It is recommended that Boston City Singers create a hiring/search committee within the board of directors. This committee should be composed of at least one chair and two other board members. This committee should remain with an odd number of individuals serving on it to help discourage an even split upon the finalization of candidates in any future hiring process. In addition, the individuals in this committee should be comprised of different identities and specializations and should have a strong commitment to the longevity of the organization while holding strong diversity, equity, and inclusion principles throughout the entire process.

Upon creation of this committee, the individuals should write and regularly revise, as needed, a statement or guideline that details how the committee will incorporate diversity and inclusion within the hiring process, and it should be posted within the job descriptions and postings. In addition to this organization statement, the committee should develop a rubric with criteria based on the job description and talking points that are appropriate and desirable to raise with candidates, which will be used to objectively evaluate candidates at various stages of the selection process. This rubric should be shared with all those who will be responsible for evaluating candidates.

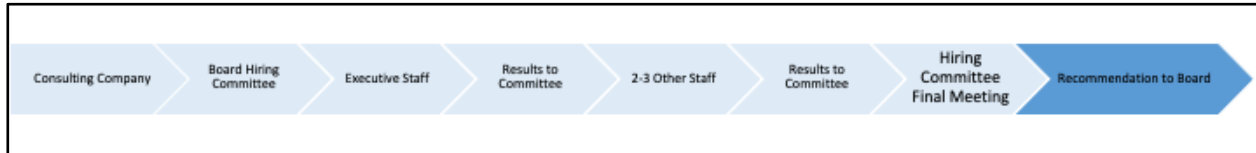
During the hiring process, all candidates should be directly informed that they can ask for accommodations during any part of the interview process. In a College Art Association of America article, they specify some of these accommodations that might include but should not be limited to *"open or closed captioning in preliminary virtual interviews, providing candidates with interview questions prior to the virtual or in-person interview, appropriate rest breaks throughout the interview if it is a longer duration of more than an hour, providing transportation alternatives to walking or stairs, the availability and identification of gender-neutral bathrooms, and making available a variety of seating options, including armless chairs."* Candidates are more likely to perform better and accept positions in environments where they feel comfortable and share intellectual and social interests.

In collaboration with the hiring consultants, job posting strategies should be a shared initiative. The announcement of the position's availability should be made to all sites and institutions that have a history of working with and helping the organization. The job posting should be advertised and announced, which reaches a diverse set of candidates, including in international forums or on hiring platforms.

Lastly, the committee should be as transparent as possible with each candidate about the timeline of the search and what to expect in the future stages of the process.

Boston City Singers Recommended Interview Course

The following table represents the recommended hiring course that Boston City Singers should take when hiring at the executive level. This approach helps the organization stay true to the candidates without any bias or preconceived notions while providing a more equitable hiring process.



1. **Consulting Company:** Upon activation of the hiring consulting company, they should provide prospective candidates to the Board of Directors hiring committee.
2. **Board Hiring Committee:** The committee should start with preliminary interviews with the selected candidates. Following these interviews, if there are successful candidates, there should be an interview scheduled with the opposite executive staff member that they will be working closely with.
3. **Executive Staff:** This executive staff member will follow the steps laid forth in the rubric that the committee has shared, which outlines standard questions and recommended questions to be asked.
4. **Results to Committee:** The executive staff member will forward the results of each candidate interviewed to the committee, and upon their review, they will decide whether to move forward with the next step.
5. **Other Staff:** These staff members will follow the steps laid forth in the rubric that the committee has shared, which outlines standard questions and recommended questions to be asked.
6. **Results to Committee:** Interviewers should debrief to give the individual or group the chance to check for biases or assumptions, especially if there were discrepancies. Debriefing with the rubric helps ensure that candidates are measured against the bar the committee previously defined. These staff members will forward the results of each candidate interviewed to the committee, and upon their review, they will decide whether to move forward with the next step.

7. **Final Meeting:** The committee shall meet to review all candidates and the interview process information to determine the candidate that best fits the organization.
8. **Recommendations to Board:** The committee proposes the top three candidates to the board with ratings of one through three, corresponding to the order in which the offer should be made.

Non-executive level hiring should follow this path from the Executive Section (parts #3–6) to the results but said results would be forwarded back to the executive member that is hiring instead of the board hiring committee.

Interview Rubric and Question Structure

Creating a rubric should be a collaborative experience with the newly formed hiring committee, the board of directors, and other staff members. Skipping this collaborative step will result in individuals defaulting to their own criteria to assess candidates. Being able to lay the groundwork prior to the hiring process's beginning will help negate biased hiring. A standard rubric should incorporate must-haves, which can be determined based on pieces of the job description and the quality within that role being hired. Also, incorporating pieces that align with the organization's future initiatives will help analyze the scope of the individual and how they could progress the organization's future. A recommended rubric can be found in **Appendix 2 and 3**. This rubric was created by the Management Center, whose mission is to advance justice and equity within the United States, focusing on different approaches to management.

Consulting Firms

Following these practices, we have concluded that we should recommend that the Boston City Singers Board of Directors engage and hire a consulting company that specializes in executive-level positions in the arts and cultural sector. The following list includes some prevalent and highly rated consulting firms that work with multifaceted organizations while adopting many of these current hiring practices:

- **Arts Consulting Group** is a leader in providing interim management, executive search, revenue enhancement, strategic planning, community engagement, and facility and program planning services for the arts and culture industry. On the Arts Consulting Group website, they specify their executive search approach, stating, "At ACG, we embrace a non-traditional, open, and multi-faceted approach, embedded in inclusion, diversity, equity, and access, creating new opportunities for leaders and the communities and organizations they serve. Our unique executive search process balances qualitative and quantitative data to ensure that the candidates possess the skills, experience, and educational requirements to excel in the role and fit your organization's culture, team, and

community. Competencies, communication style, motivations, and values—these soft skills are the key to lasting success." Website: www.artsconsulting.com.

- **Tom O'Connor Consulting Group** is dedicated to furthering the arts through their work of strategic planning and recruiting while connecting the organization's opportunities to their vast and diverse network of arts professionals. They will work to customize strategies, show commitment to DEIA, and bring a human touch to the organization to help analyze potential candidates. See **Appendix 4** for a one-page hiring practice example.] Website: <https://www.tomocgroup.com/>
- **ALJP Consulting, LLC**, is a smaller consulting firm that puts inclusion and equity at the forefront of its work. They employ planning and search services to help address the modern challenges facing non-profit organizations in the arts and culture sector. Striving to create more diverse and inclusive environments for artists, administrators, and patrons. On the ALJP Consulting website, they specify their executive search approach, stating, "We will tap into our network of colleagues and peers to help you find the right talent. Whether you're looking to fill entry-level positions or mid-level and executive management roles, we identify promising job seekers and provide specific matches for your review." Website: www.aljpconsulting.com.
- **Advisory Board for the Arts** is one of the largest global network-based learning organizations in the cultural sector, enabling their own network, research capabilities, and expertise to gather ideas from around the globe to help your organization find breakthrough solutions and achieve lasting success. Through this firm, you would receive a dedicated Member Advisor who would understand your present opportunities and pressing challenges and translate them into actionable solutions via hiring and retention strategies and searches. Website: www.advisoryboardarts.com.

Job Descriptions and Posts

In order to find the best candidates possible, the organization must be clear on what they are looking for, including characteristics beyond basic qualifications for the role. The job post is the first introduction that potential candidates have to the role and how it fits into the organization. Therefore, it is crucial that the organization provides a detailed description of the role in a clear and concise way. We recommend structuring it as follows:

- **Job Basics:** these include:
 - Title of the role
 - Reporting structure
 - Benefits
 - Time commitment

- **Organization Introduction:** A brief introduction of the organization that clearly presents the greater mission of the role.
- **Job Summary:** A brief narrative description of what the job functions are.
- **Job Responsibilities:** a list of the role's responsibilities, divided out by different categories, for example:
 - Administrative Responsibilities
 - Educational Responsibilities
 - Advancement Responsibilities
- **Ideal Candidate Description:** Beyond the basic functions of the role, describing the personal qualities that would make a person be the best fit allows candidates to holistically assess their qualifications.
- **Preferred Qualifications and Skills:** Finally, you list the baseline qualifying factors for the candidate, for example:
 - Work experience
 - Management experience
 - Functional Skills
 - Physical requirements (i.e.: must be able to stand for long periods of time)
- **Compensation:** Salary transparency is highly valued, including the salary of the position will allow candidates to apply with the right expectations.
- **How to apply:** An outline of the steps candidates need to take. This will answer the questions of:
 - Where candidates submit their application
 - Who to contact with questions.
 - What not to do (i.e., please do not call the organization during your application process).
 - What is the application deadline.

For examples of this type of job posting, please see **Appendix 5**.

We restructured the job descriptions for the executive team based on these recommendations. We recommend standardizing the job descriptions for all full- or part-time staff in this format.

For these examples, please see **Appendix 6**.

RECOMMENDATION #3:

Building a Succession Planning Strategy

While a Succession Plan is a procedure that an organization should never actually have to put into place, it's a valuable tool that allows an easy transition during an otherwise turbulent time. Due to unexpected emergency situations, the organization may be left without leadership, either temporarily or permanently, and this sudden departure does not provide the grace of a two week notice in order for the organization to prepare for transitions. The Succession Plan creates clear guidelines and timelines. The focus should be on the long-term goals of the organization rather than simply finding someone to fill a role quickly.

Long-Term Succession Plan

PREPGO Model for Succession Planning

Upon the conclusion of our research, we agreed that the best model to base the succession plan on was the PREPGO model used in educational settings. The PREPGO model focuses on preparing and empowering current employees and puts them on a path towards the leadership positions available at the organization. The PREPGO model also offers opportunities for sustainability within leadership in an organization, as well as valuing mentorship, staff morale, and professional development.

The model is centered around these stages and guiding points. For an extended outline, see **Appendix 7**.

Stages	Guiding Points
Planning	<ul style="list-style-type: none"> ● Proactive succession planning for strategic hiring and promotion practices ● Preparing the right talent (current employees) to move into short- or long-term leadership roles
Recruiting	<ul style="list-style-type: none"> ● Strategically searching for staff that have the potential to hold leadership roles. ● During recruitment process search for qualities including coping with high stress, ability to manage multiple projects, previous commitment to similar work, long-term career plans that match organizations future plans
Empowering	<ul style="list-style-type: none"> ● Foster a working community centered around boosting morale and empowering current employees. ● Focus on retention
Preparing	<ul style="list-style-type: none"> ● Allow different staff members to spearhead projects to provide growth opportunities. ● Provide mentorship by Executive Team as much as possible. ● Assess staff performance focusing on points of growth and professional development
Guiding	<ul style="list-style-type: none"> ● Train all staff on leading sustainable programs so that they are prepared to step in when needed
Off to Work	<ul style="list-style-type: none"> ● New leaders’ step into their roles and continue the cycle of PREPGO in alignment with the next succession and strategic plans

PREPGO has been defined by Lili C. Melton as a “continued procedure to identify, develop, train, promote, and maintain current employees for future leadership roles.” By intentionally recruiting new staff that show leadership skills, and then training them with the goal of one day promoting them to a position on the executive team, the organization is preparing itself for any expected, or unexpected, turnover. This model also facilitates building an organizational culture where professional growth and mentorship are at the core of the team dynamic, which has been shown to retain employees. This model requires constant planning and preparation, which will help with timely transitions of power and information and provide a smooth transition for the entire team.

We believe that the PREPGO model fits well with the Boston City Singers needs because it is, essentially, an education organization. The community that Boston City Singers has built is at the heart of the work and, like a school, would greatly benefit from a leadership team that is loyal and committed to the success of the students and the growth of the organization. Research in succession planning has shown that the PREPGO model is a strong model to implement because it focuses on the development of the staff as well as the students in the organization. Sustainability is a concerning issue within Boston City Singers because of its small leadership team. This concern can be mitigated by fostering strong leaders in every part of the organization's team, so that when

a need arises, there are current staff members that can step in and be trusted to prioritize the organizations best interests, while minimizing the learning curve.

Suggested Timeline for a Long-Term Succession Plan

Along with the PREPGO model, it is important to have a clear timeline within which the organization can execute their succession plan. This timeline begins with the moment that an Outgoing Director (either the Artistic or Managing) gives notice that they are departing. The timeline is built to be executed over the course of a full year, we understand that giving one year’s notice is unusual, so the timeline can be adapted to shift the Outgoing Directors projects to a shorter timeline if needed.

Timeline Point	Responsibilities
Step 1: Within first two weeks of notice	<p>Board:</p> <ul style="list-style-type: none"> ● Reviews job description to ensure that it is up to date with job responsibilities and organizational structure. ● Reviews current organizational hiring practices and priorities ● Reviews possible consulting firms that will help assist in the process and starts reaching out to the appropriate firms to begin the process. ● Forms a Hiring Committee that will work alongside consulting firms. <p>Board and Executive Team:</p> <ul style="list-style-type: none"> ● Reviews current projects under Outgoing Director’s responsibilities and builds a timeline for their completion
Step 2: Within 1st month of notice	<p>Board:</p> <ul style="list-style-type: none"> ● Completes hiring process for a consulting firm and passes on necessary information for candidate searches. ● Finalizes job post, job description, and any necessary restructuring of the organization. <p>Outgoing Director:</p> <ul style="list-style-type: none"> ● Begins compiling all information pertinent to the organization and their role ● Establishes company information drive for the storage of company files ● Begins passing all information from personal drives to company drive
Step 3: Within 2-3 months of notice	<p>Consulting Firm:</p> <ul style="list-style-type: none"> ● Conducts thorough candidate search. ● Reviews applications for Outgoing Director role and provides organization with a list of possible candidates for consideration. <p>Board:</p> <ul style="list-style-type: none"> ● Reviews the following with guidance of consulting firm: <ul style="list-style-type: none"> ○ Interview Questions ○ Candidate evaluation rubric

	<ul style="list-style-type: none"> ● Reviews final hiring priorities to guide the interview process and final search. <p>Executive Team:</p> <ul style="list-style-type: none"> ● Begins to prepare for Marketing and Development Director search. ● Reviews job description, benefits package, and job posting. ● Sends the above to Board for approval
<p>Step 4: Within 3-4 months of notice</p>	<p>Consulting Firm:</p> <ul style="list-style-type: none"> ● Passes on a list of best candidates from the search to the Board. ● Continues search in case the first round of candidates does not meet the organization's needs. <p>Board:</p> <ul style="list-style-type: none"> ● Selects which candidates will be moving forward with the interview process. ● Set up an interview structure. We recommend the following: <ul style="list-style-type: none"> ○ Initial phone screen conducted by a board member to assess initial qualifications. ○ Select candidates will move on to a 2nd round interview with a member of the Executive Team ○ Select candidates are invited to a 3rd, and final, round of interviews with the Board Chair and Vice-Chair ● Approves job posting, job description, and benefits package for Marketing and Development Director
<p>Step 5: Within 7-8 months of notice</p>	<p>Board:</p> <ul style="list-style-type: none"> ● Makes offer of employment to their chosen candidate ● Sets up ideal start date for candidate. ● Requests a progress report from Outgoing Director on the transfer of information project. <p>Executive Team:</p> <ul style="list-style-type: none"> ● Posts Marketing and Development Director position on the organization's website and other recommended platforms ● Prepares interview processes for Marketing and Development Director. This includes: <ul style="list-style-type: none"> ○ Interview Questions ○ Candidate Evaluation Rubric
<p>Step 6: Within 8-10 months of notice</p>	<p>Executive Team:</p> <ul style="list-style-type: none"> ● Prepares organization for change in leadership and welcoming new team members. ● Begin candidate interviews for Marketing and Development Director <p>Outgoing Director:</p> <ul style="list-style-type: none"> ● Prepares onboarding and training guide for Incoming Director ● Schedules trainings for Incoming Director

	<ul style="list-style-type: none"> • Completes the transfer of information project
Step 7: Within 10-11 months of notice	<p>Executive Team:</p> <ul style="list-style-type: none"> • Hires Marketing and Development Director • Establishes training and onboarding processes for Marketing and Development Director <p>Incoming Director:</p> <ul style="list-style-type: none"> • Begins working with organization, ideally with six weeks of overlap with Outgoing Director to facilitate the training and transfer of power. • Meets with Board and entire staff team
Step 8: within 11-12 months of notice	<p>Incoming Director:</p> <ul style="list-style-type: none"> • Completes onboarding and training. <p>Marketing and Onboarding Director:</p> <ul style="list-style-type: none"> • Completes onboarding and training. <p>Outgoing Director:</p> <ul style="list-style-type: none"> • Remains at organization in a consulting capacity, exclusively, to oversee the final transition between directors and facilitate the introduction of the Incoming Director to the organization's community
Step 9: within 12 months of notice	<p>Incoming Director:</p> <ul style="list-style-type: none"> • Adopts full responsibilities and duties of the position. <p>Outgoing Director:</p> <ul style="list-style-type: none"> • Completes exit processes, as guided by the Board, and retires from the organization

Long-Term Succession Timeline



Emergency Succession Timeline

In addition to the Long-Term Succession planning, an Emergency Succession plan is also necessary to ensure that the organization has the right planning in place to maintain the organization as stable as possible during any unexpected departures on the executive team. This timeline is a condensed, 21-week version of the long-term plan and excludes the hiring process for a Marketing and Development Director. With unexpected departures, the organization's top priority should be to find a new Director; organizational restructuring can take place once a new Director is appointed.

When executing this timeline, it is essential that the remaining executive staff and board members place great effort in keeping staff morale high because finding a new Director within such a short period of time will require the participation of everyone in the organization.

Timeline Point	Responsibilities
Week 1	<p>Board:</p> <ul style="list-style-type: none"> ● Reviews job description to ensure that it is up to date with job responsibilities and organizational structure. ● Reviews current organizational hiring practices and priorities ● Reviews possible consulting firms that will help assist in the process and starts reaching out to the appropriate firms to begin the process. ● Forms a Hiring Committee that will work alongside consulting firms. ● Identifies and appoints a current staff member as Interim Director <p>Outgoing Director:</p> <ul style="list-style-type: none"> ● Reviews current and upcoming projects and identifies the projects with the highest priorities. ● Begins collecting all organizational information from personal drives and moves them to company drive
Week 2	<p>Board:</p> <ul style="list-style-type: none"> ● Hires consulting firm and sets accelerated timeline for search. <p>Outgoing Director</p> <ul style="list-style-type: none"> ● Meets with Interim Director to review project list and identify any resources the Interim Director might need to execute new responsibilities. ● Discusses with Interim Director how the organization will distribute additional work amongst the current staff. ● Completes the transfer of information from personal drives to company drives. ● Departs the organization. <p>Interim Director:</p> <ul style="list-style-type: none"> ● Introduced to major stakeholders to formalize the temporary transition of power and point of contact and assumes interim role.

<p>Weeks 3-6</p>	<p>Consulting Firm:</p> <ul style="list-style-type: none"> ● Begins robust candidate search and begins providing possible candidates for consideration. <p>Board:</p> <ul style="list-style-type: none"> ● Meets with Interim Director to discuss the temporary distribution of responsibilities among staff. ● Focus on either adding an additional temporary staff member for administrative tasks or add working hours for current part-time staff. <p>Interim Director:</p> <ul style="list-style-type: none"> ● Calls and facilitates an all-staff meeting to discuss new work distribution and next steps in the leadership transition. <p>Part-Time Staff or Temporary Staff Member:</p> <ul style="list-style-type: none"> ● Begin additional hours to balance out distribution of responsibilities
<p>Weeks 7-9</p>	<p>Consulting Firm:</p> <ul style="list-style-type: none"> ● Passes on an initial list of candidates for the Board to review. ● Continues search in case the first round of candidates does not meet the organization's needs. <p>Board and Executive Team:</p> <ul style="list-style-type: none"> ● Reviews the following with guidance of consulting firm: <ul style="list-style-type: none"> ○ Interview Questions ○ Candidate evaluation rubric ● Reviews final hiring priorities to guide the interview process and final search. ● Begins candidate interview process (if applicable; should follow the same process outlined in long-term plan)

<p>Weeks 10-12</p>	<p>Consulting Firm:</p> <ul style="list-style-type: none"> ● Provides new batch of candidates for Board to review. <p>Board and Executive Team:</p> <ul style="list-style-type: none"> ● Continues interview process with new candidates. <p>Board:</p> <ul style="list-style-type: none"> ● Checks in with Interim Director to ensure that the organization has continued to run without any major disruptions to programming and that staff morale is still high
<p>Weeks 13-15</p>	<p>Board:</p> <ul style="list-style-type: none"> ● Selects their top candidate and sends an offer of employment with the emphasis of the need for a quick start date. <p>Executive Team:</p> <ul style="list-style-type: none"> ● Builds training and onboarding guide for Incoming Director
<p>Weeks 16-18</p>	<p>Incoming Director:</p> <ul style="list-style-type: none"> ● Begins working at the organization. ● Meets with Board and executive team to gain an understanding of the current organizational landscape. ● Introduces themselves to all staff. <p>Executive Team:</p> <ul style="list-style-type: none"> ● Begins executing training and onboarding cycles for Incoming Director
<p>Weeks 19-20</p>	<p>Board and Executive Team:</p> <ul style="list-style-type: none"> ● Meet to identify the projects with the highest priority to continue the stabilization of the organization. <p>Incoming Director:</p> <ul style="list-style-type: none"> ● Continues training cycle. ● Meets with all staff to communicate next steps for the organization
<p>Week 21</p>	<p>Interim Director:</p> <ul style="list-style-type: none"> ● Transitions all temporary duties and responsibilities to the Incoming Director <p>Incoming Director:</p> <ul style="list-style-type: none"> ● Completes training and onboarding cycle.

	<p>Board and Executive Team:</p> <ul style="list-style-type: none">● Meet to discuss any possible restructuring of the organization.<ul style="list-style-type: none">○ i.e.: adding a Marketing and Development Director <p>Part-Time Staff or Temporary Staff:</p> <ul style="list-style-type: none">● Return to their original hours and responsibilities
--	--

Emergency Succession Timeline

Notice

Full-time staff member unexpected departure from organization.



Week 1

- Board Meeting called to review:
 - Job description and benefits package
 - Hiring Committee structure
- Appoint current staff member as Interim Director for vacant role
- Initiates search for consulting firm to assist in the candidate search
- Outgoing Director reviews current important resources and projects



Week 2

- Interim appointee transition:*
- Outgoing Director meets with Interim Director to review priority projects
 - Interim Director is introduced to major stakeholders to formalize the transition of point of contact
 - Outgoing Director transfers all company information to company drive
 - Outgoing Director departs
 - Board hires consulting firm and sets accelerated timeline for search



Weeks 3-6

- Consulting company searches, reviews, and provides a pool of possible candidates for consideration.
- Board meets with Interim Director to discuss distribution of work
- Interim Director calls all staff meeting to discuss next steps in leadership transitions



Weeks 7-9

- Board and executive staff begin to prepare for candidate interviews and review:
 - Interview questions
 - Candidate evaluation rubric
 - Final hiring priorities
- Consulting firm provides an initial short list of candidates



Weeks 10-12

- Consulting firm provides new batch of candidates
- Board continues interview processes with board members and current executive team
- Board checks in with Interim Director to ensure that the organization is now stable and moving forward with new staff structure



Weeks 13-15

- Board sends offer of employment to chosen candidate and emphasizes the need for a quick start date
- The executive team builds a training and onboarding guide for Incoming Director



Weeks 16-18

- Incoming Director begins working at the organization
- Incoming Director meets with Board and Executive Team to gain an understanding of the current organizational landscape



Weeks 19-20

- Incoming Director continues training cycle
- Board and executive team identify the projects with the highest priority to stabilize the organization
- Incoming Director meets with all staff to communicate next steps for the organization



Week 21

- Interim Director transitions all temporary duties and responsibilities to the Incoming Director
- Incoming Director completes training cycle and assumes full role
- Part-time staff return to their original schedules
- Executive team meets to discuss possible organizational restructuring



**This succession timeline is over the course of 21 weeks from the time of the employees unexpected departure.

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Appendix 1: Marketing and Development Director Job Description

Marketing and Development Director

The Boston City Singers Marketing and Development Director is a pivotal position within Boston City Singers. The Marketing and Development Director creates and implements the marketing plan and development direction for the organization.

(adapted from <https://greaterpublic.org/jobs/director-of-development-marketing/>)

Development Duties and Responsibilities

- Develops fundraising plans and objectives with the Executive Team
- Prepares budgets and effectively manages financial, staff and personal resources
- Writes, submits, and secures general operating and capacity building grants. Writes and submits the associated grant reports.
- Investigates, researches, and pursues program partnerships and strategic alliances that will extend and increase avenues of support.
- Manages major gifts and planned giving programs, including identification of prospects, cultivation, solicitation and stewardship of donors.

Marketing Duties and Responsibilities

- Develops marketing plans and objectives in conjunction with the Executive Team
- Directs the creation, production, and distribution of all marketing materials such as press releases, newsletters, and publications (print and digital) and ensures the consistent use of all print and electronic branding assets such as letterhead and logos. Updates style guide as needed.
- Strategically selects sponsorship opportunities and community outreach events that elevate the Boston City Singers profile and brand awareness.

Essential Skills and Experience

- Bachelor's degree or above
- Minimum five years proven and measurable experience in developing and implementing a wide variety of fundraising and/or marketing programs for non-profit organization
- Excellent written and verbal skills
- Major gifts solicitation experience
- Knowledge of the Boston regional community and culture
- Commitment to the Boston City Singers core values

Appendix 2: Hiring Rubric Sample Template

Candidate Evaluation Rubric [TEMPLATE]

Candidate:

Interviewer(s):

Date:

Please rate candidate on scale of 1-4 based on whether they hit our bar in each specific must-have:

- 4 = Solidly meets the bar
- 3 = Yes, with some concerns
- 2 = Evidence points to no
- 1 = Big Red Flag in this area

NOTE: The numbers are a rough guide—we care more about your impressions, questions, and thoughts on strengths and/or flags than we do about the numbers themselves; they're just a helpful shorthand. Ultimately, hiring managers will make final decisions weighing various needs and trade-offs.

One-sentence profile:

Must-have <i>(These describe a 4. This is not the highest ideal; it's a description of the fundamentals.)</i>	1-4	Comments/Examples/Evidence <i>Please note 1-2 examples of what you observed; if you have questions or concerns, include them.</i>
Must-have #1: • • •		
Must-have #2: • • •		
Must-have #3: • • •		
Must-have #4: • • •		

Other comments:

Overall recommendation:

Appendix 3: Hiring Rubric Sample Template (Filled Out Example)

Rubric — Admin Sample [FILLED OUT EXAMPLE]

Candidate: Stacy

Interviewer: Ashley

Date: 00/00/0000

Please rate candidate on scale of 1-4 based on whether they hit our bar in each specific must-have:

4 = Solidly meets the bar

3 = Yes, with some concerns

2 = Evidence points to no

1 = Big Red Flag in this area

NOTE: The numbers are a rough guide—we care more about your impressions, questions, and thoughts on strengths and/or flags than we do about the numbers themselves; they're just a helpful shorthand. Ultimately, hiring managers will make final decisions weighing various needs and trade-offs.

One-sentence profile: An efficient, detail-oriented person with racial equity competency who's great with people.

Must-have <i>(These describe a 4. This is not the highest ideal; it's a description of the fundamentals.)</i>	1-4	Comments/Examples/Evidence <i>Please note 1-2 examples of what you observed; if you have questions or concerns, include them</i>
<p><u>Highly organized, motivated, & detail-oriented</u></p> <ul style="list-style-type: none"> Juggles competing demands and prioritize without sacrificing quality. Already has or can quickly create a system for keeping details from slipping through the cracks (for self & team). Notifies errors that others might overlook and fixes them; has a track record of leaving things better than they found them. 	4	<ul style="list-style-type: none"> Great instincts during the exercise! They suggested using tags to improve our system. I might be biased because they remind me of one of my favorite former co-workers. Passed written exercise with flying colors! Appreciated the anecdote about fixing a shipping error at their last job.
<p><u>Relationship-building & reliability</u></p> <ul style="list-style-type: none"> Empathizes with communities we serve and puts people at ease, even with cultural or communication differences. Listens closely to understand people's needs or concerns. Identifies barriers and proposes ideas to improve access. Takes pride in providing clear, helpful information. Welcomes feedback and can adapt to new ideas and priorities. Follows through on commitments. Builds authentic relationships with others based on mutual trust and respect across lines of difference, such as race, ethnicity, status, sexual orientation, ability, or gender identity. 	3	<ul style="list-style-type: none"> Not a lot of experience in public or client-facing roles to draw from, so unclear how they problem-solve in real time. Answers to our simulation questions show that they have the right attitude and can keep their cool when faced with a complaint or concern. Asked questions to understand scenario better and integrated the info in their response.
<p><u>Racial equity & inclusion experience, skills, & values</u></p> <ul style="list-style-type: none"> Deeply believes that racial equity and social justice are important and is comfortable talking about race, gender, and other identities in plain (non-euphemistic) and specific terms. Recognizes ways that race, and other identities intersect in the work, especially for communities we serve. Continually able to hear, reflect, and act on feedback re: identity and equity with the aim to learn. 	2.5	I have some doubts about their ability to get beneath the surface of equity and identity issues, though they seem very open to learning. I'd like to hear more about how they see themselves improving/building on this competency.
<p><u>Culture:</u></p> <ul style="list-style-type: none"> Flexible and able to adapt to shifting priorities. Enthusiastically offers and accepts support from colleagues. 	4	Clearly took time to look at our website / get to know our programs and mission. Very eager to learn; prepared insightful questions for us. Gave concrete example of time they responded well to change and collaborated with others.

Other comments:

Overall recommendation: Yes, to moving onto the next round, but probe more into racial equity competency

Appendix 4: Tom O'Connor Consulting Group Hiring One Pager

TOM O'CONNOR
CONSULTING GROUP

Hire your next arts leader with confidence, focus, and precision

Finding the right leader is a pivotal task that deserves full attention, but most organizations don't have that luxury. With our vast and diverse network of arts professionals, the capacity to fully vet candidates from first-hand industry experience, and a keen eye to distinguish style from substance, we'll connect you with our industry's sharpest minds.

4 Keys to Our Process



Customized Strategy

Crafting a research, outreach, and posting plan to find and fully vet a candidate pool tailored to the nuances of your role



Commitment to DEIA

Leveraging our network and community partnerships to deliver a diverse and equitable candidate pool primed for success



Human Touch

Our expertise and insights deliver unexpected and exciting options no algorithm can, along with an exceptional candidate experience



Our Promise

If our hire stays less than one year, we will deliver additional candidates free of charge—we are committed to their success and yours

Select Clients

Art 21 • Capacity Interactive • Classical Theatre of Harlem • Flint Institute of Music • Glenstone
Grand Rapids Symphony • Hartford Stage • Huntington Theatre Company • LaPlaca Cohen
MCC Theater • The Metropolitan Opera • The Park Avenue Armory
Segerstrom Center for the Arts • Westport Country Playhouse • ZACH Theatre

Who We Are

Tom O'Connor Consulting Group (TOCG) is a NYC-based arts consultancy for institutions and leaders, offering two complementary services: organizational strategy and executive search, each guided by an experienced team of arts professionals.



Tom O'Connor
President & Founder



Cynthia Fuhrman
Vice President,
Executive Search



Jordan Sanford
Director of Search
Operations & Community

The candidates presented to us were rich in experience, skills, and perspectives... the insight and dedication shown by the team to making a great match for our organization was invaluable.




— Cynthia Rider, Managing Director, Hartford Stage

For our full services, client list, and testimonials, visit www.tomocgroup.com

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Appendix 5: Sample Job Posting

Messages 8:06 PM Wed Apr 26 ••• 89%
bostonchildrenschorus.org

BCC PROGRAMS HEAR US JOIN US NEWS SUPPORT ABOUT US [DONATE NOW](#)
[MY BCC](#)   

SING WITH US

JOB OPPORTUNITIES



Support BCC

4 out of 5 singers receive financial aid. We rely on the annual support of individuals like you who believe, as we do, in the transformational power of music.

[Donate Now](#) →

DIRECTOR OF GOOD TROUBLE

Title: Director of Good Trouble

Reports to: Executive Director

Benefits: Yes

Hours: Full-time, in-person, and occasional weekends required

ABOUT BCC

Boston Children's Chorus harnesses the power of music to connect our city's diverse communities, cultivate empathy and inspire social inquiry. Children, ages 7-18, come together across differences of race, religion, and socioeconomic status in a celebration of shared humanity and love of music. The focus is not on one specific community, but the energy of the intersection of all communities. BCC bridges Greater Boston's many diverse groups and fosters a sense of belonging and inclusion. Through engaging choral training and once-in-a-lifetime performing experiences locally, nationally, and around the world, BCC enhances the education and social development of youth as leaders and global citizens in the 21st century.

POSITION SUMMARY

The Director of Good Trouble will provide leadership in elevating youth voice through education and action. In close partnership with the Music Director, the Director of Good Trouble will shape programmatic offerings, elevating artistry, and social inquiry in a harmonious fashion. The Director of Good Trouble will be a key architect in the re-design and implementation of Boston Children's Chorus' integrated music education and social justice education curriculum. They will lead, train, and inspire program staff by modelling best practices and cultivating a culture of continuous learning and growth. The Director of Good Trouble will have the opportunity to shape how Boston Children's Chorus re-commits to being a multi-cultural, anti-ableist, anti-racist institution focused on creating transformative experiences for young people in the Greater Boston region.

Appendix 5: Sample Job Posting (Continued)

EDUCATIONAL RESPONSIBILITIES

- Collaborate with experts to design a new integrated curriculum that deeply connects choral music education to social justice education
- Examine program design, gathering community input to ensure BCC's offerings meet youth and family needs. Act on findings implementing incremental design tests and updates to BCC's programs
- Oversee implementation and ongoing evaluation of curriculum and corresponding learning objectives
- Source, develop, and implement meaningful cross-sector community partnerships that allow young people to take action towards the issues being discussed in rehearsal
- Revamp BCC's Listen In program
- Introduce service learning as a core component of BCC's programmatic offerings
- Oversee singer leadership programs, providing program and facilitation support to teaching staff
- Additional duties as defined by the Executive Director

MANAGEMENT RESPONSIBILITIES

- Manage regular check-ins with full-time artistic and program staff to monitor workflow and progress towards goals
- Schedule regular observations of conducting staff, providing frequent formal and informal feedback
- Create consultative practices that tie programmatic outputs to topical interests of youth and families
- Provide written reports for major board committee meetings including Finance, Programs, and Development committees
- Additional duties as defined by the Executive Director

Appendix 5: Sample Job Posting (Continued)

ARTISTIC RESPONSIBILITIES

- Collaborate with artistic team to design season and concert themes
- Work with artistic team to craft social activities for retreats, concerts, and digital broadcasts
- Work with the program team to identify and solicit artistic and community partnerships for long-term and short-term projects
- Work with artistic team to develop targeted learning objectives and activities for domestic and international tours
- Collaborate with artistic and production teams to regularly design and showcase innovative media projects that elevate youth voice

ADVANCEMENT RESPONSIBILITIES

- Represent the organization by attending regional, state, and national conferences, festivals, and summits
- Support marketing and development teams in crafting mission-aligned narratives for appeals and campaigns
- Manage a small portfolio of 10-15 high-level supporters to the institution
- Contribute thought leadership to the field of choral music education, promoting BCC's curricular and instructional approaches through presentations and written articles
- Attend fundraising and cultivation events at the request of the Executive Director

Appendix 5: Sample Job Posting (Continued)

THE IDEAL CANDIDATE IS:

- Committed to BCC's mission and values of quality, diversity, inclusion, social inquiry, cultural equity, and the potential of transformative philanthropy
- Devoted to helping young people develop to their full potential
- An artist, an activist, and a change-agent
- Committed towards positive change and action
- A thought leader with a demonstrable track record of driving incremental improvement
- Able to articulate how their lived experience with inequities prompted them to change their environment through their creative and professional work

PREFERRED QUALIFICATIONS AND SKILLS

- Minimum 5 years of relevant professional work experience, including but not limited to, justice, equity, diversity, access, and inclusion (JEDAI), in an educational setting
- Deep expertise in intergroup dialogue facilitation
- Experience developing and facilitating workshops and programs on both teaching and learning JEDAI
- Minimum 5 years of experience working with students and teachers in an Early Childhood, Elementary, Middle, and High school settings
- Minimum 5 years of direct supervisory experience, having led and mentored a team of highly capable individuals
- Strong interpersonal and communication skills, especially public speaking and written skills
- Bilingual written and verbal proficiency
- The right candidate will be a capable, independent worker with strong entrepreneurial spirit, and the ability to work in a fast-paced, changing environment

Appendix 5: Sample Job Posting (Continued)

COMPENSATION

Salary for the role of Director of Good Trouble at Boston Children's Chorus is \$100,000. BCC offers a competitive benefits package including health insurance, 403(b) employer contributions, generous PTO, short-term disability, and more.

HOW TO APPLY

For immediate consideration submit a letter of interest, sample lesson plan or draft social curriculum or published article, and resume addressed to the Search Committee via email: humanresources@bostonchildrenschorus.org. Please apply by January 3, 2023.

NO PHONE CALLS, PLEASE.

Boston Children's Chorus seeks to engage and retain a diverse workforce who represent the diversity of our singers and community in the City of Boston. BCC affirms the plurality of lived experiences amongst staff and seeks to elevate and center the experiences of those who have been marginalized and disenfranchised by systems of oppression. BCC encourages all to apply and will not discriminate on the basis of race, ethnicity, religion, color, national origin, sex, gender and gender expression, sexual orientation, age, veteran status, disability status, or any other applicable characteristics protected by law.

Appendix 6: Executive Team Job Description Restructuring

Managing Director – Melissa J. Graham (February 2011 to present)

The Managing Director of Boston City Singers is an important administrative role responsible for overseeing the entire organization and its relationship with the community. This position involves providing leadership for the organization, managing finances, handling human resources duties, coordinating event-related affairs, assisting with international and domestic tours, and working closely with the board of directors.

The Managing Directors primary administrative duties include:

- Establishes Boston City Singers administrative calendar
- Oversees daily operations
- Maintains and oversees insurance and other general business necessities including annual insurance renewal and insurance audits
- Manages administrative staff, including bookkeeper and website manager
- Manages administrative program managers in association with Artistic Director
- Maintains rehearsal site contracts and relationships
- Responsible for Government Relations and Crisis Management as needed
- Manage advocacy function concerning state requirements
- Address community organizations to position the organization as an active community participant
- Responsible for negotiating all fees and expenses
- Responsible for reviewing and signing all contracts
- Serves as an advisor to Parent Council
- Prepares MOUs for off-site teaching (Conservatory Lab Charter School, Paraclete Center, Leahy Holleran Community Center)

As the main financial manager for the organization, the Managing Director also focuses on financial planning, oversight, and compliance. Responsibilities include:

- Oversees annual budget with guidance from the Board
- Manages the invoicing of tour and tuition fees for all members and assists families with payment plans and tuition and tour scholarship requests
- Manages and participates in financial aid request interviews in association with a board member
- Tuition and tour fee collection activities
- Oversees records and instructs bookkeeper regarding cash disbursements
- Oversees PayPal account, issues refunds paid via PayPal
- Manages Paychex relationship for payroll and reporting
- Manages auditor relationship in association with the bookkeeper for the annual audit. (Oct - Jan)
- Manages Audit distribution to the Board of Directors and funders.
- Finalizes audit, 990 and PC, pays filing fees, submits PC to state and distributes
- Provides documentation pertaining to real or personal property to the City of Boston.
- Manages SEP distribution to individual financial planning accounts (Jane (Vanguard) and Melissa (Fidelity) twice annually – December and March

The Managing Director also acts as the organizations Human Resources liaison. Human Resources responsibilities include:

- Manages HR issues for administrative and artistic/teaching staff
- Negotiates salaries and benefits within organizational guidelines
- Adjusts benefit guidelines to comply with best practices within the industry.

Appendix 6: Executive Team Job Description Restructuring (Continued)

- Performs CORI compliance for all staff members and volunteers in contact with members – full and part-time
- Arranges for monthly payroll for all staff, mentors, teaching fellows, and outside artistic vendor
- Conducts an annual organization-wide staffing review in association with the Artistic Director to identify positions that can be restructured for maximum effectiveness and to ensure that staff is placed in roles that best align with the organization's needs
- Prioritize equity, diversity, inclusion, and access work in all aspects of artistic and management decisions
- Distributes hiring paperwork and maintains files – direct deposit, federal forms, and general info.
- Sends bookkeeper payment info each month for Mentors and Teaching Fellows

Boston City Singers is an organization that hosts a multitude of events and all members of the team are expected to participate in the success of the Singers events. Event planning and execution responsibilities include:

- Negotiates concert fees and income
- Secures sites for mid and end-of-year concerts
- Oversees “front of house” operations for concerts, including volunteer management
- Assists with the planning, negotiations, and oversight of the February Vacation Arts Camp
- Secures musical rights/royalties through ASCAP.
- Completes quarterly ASCAP Reports
- Negotiates Rent for rehearsal and event space

The Managing Director is also a Board Liaison. Board responsibilities include:

- Sits on the Board as a resource (a defacto member - non-voting)
- Assist with Board development to secure new board members
- Assists Board Chair with managing Board meeting handouts and follow-ups
- Steers annual budget creation process with Board and Founding Artistic Director
- Ensures preparation of financial reports (Profit and Loss and Balance Sheet) for Board meetings

A key component of Boston City Singers are the tours the organization conducts. Tour responsibilities include:

- Assists Artistic Director and Tour Choir administrative Program Manager with domestic and international tour planning and implementation
- Maintain separate records of each tour's financial details
- Maintains records of member payments and sends reminders
- Assist in purchasing tickets for all tour participants
- Secures insurance for international travel

For when the job needs to get posted:

The ideal candidate for this position is:

- Committed to the Boston City Singers mission, vision, community, and growth
- Passionate about providing the best quality of arts education to youth in the community
- Interested in fostering a working environment focused on direct communication, professional growth and development, and community oriented

Appendix 6: Executive Team Job Description Restructuring (Continued)

- Organized and able to keep track of multiple projects at once
- Enjoys working on a small team and serving a large population
- Interested in developing a deep understanding of the needs of the Boston City Singers communities

Qualifications and Skills:

- Excellent organizational skills
- Relevant experience in financial management
- Relevant experience leading a team, supervisory experience preferred
- Ability to work from various sites
- Flexibility and willingness to adapt
- Excellent leadership skills and the ability to work with people from different ages and backgrounds
- Excellent communication skills

Appendix 7: PREPGO Model Points

Table 14.1 Succession planning framework to promote organizational sustainability: PREPGO

	<i>Definitions</i>	<i>Strategies</i>
P: Planning	Proactive measures to begin succession planning early on and to have the right talent ready to move into short-term or long-term leadership positions, ^a aiding in smooth transitions as leaders leave and new leaders take over. ^b	Plan preemptively and develop through talent management and recruitment strategies that are focused on bringing in successors who have the necessary talent; ^c consider the number of and types of positions needed for future leadership positions; ^d prepare for training if no qualified staff members exist in the organization; ^d examine current staff or conduct a talent study. ^c
R: Recruiting	Leaders promoting and preparing for the needs of their institution, ^f by searching for replacements who can cope with high levels of stress, make positive impacts on student achievements, have strong emotional intelligence, and be able to handle politically sensitive situations. ^b	Promote and prepare for the needs of the institution ^f by encouraging, facilitating, and attracting long-term employees, ^g who are committed to the organization and educational improvement. ^g
E: Empowering	Retaining and promoting employees to boost morale. ^h	Search for employees who are rising stars, driven, ambitious, desire growth, want to be part of the team, ^c and understand the trajectory of the school. ^h Current leaders must share plans. ⁱ
P: Preparing	Training and coaching employees to lead positive and sustained programs designed to promote the organization and to progress the institution to greater heights. ^j	Build relationships and foster change through motivational and supportive means; ^h team prospective leaders with successful, seasoned employees; ^c create and use internal leadership programs. ^k
G: Guiding	Pairing skilled and experienced employees, ^l and mentees mentoring staff for leadership positions to assist with retention of employees. ^m	Ensure the mentor and mentee share a common background; make certain appropriate expectations are in place; ⁿ set mentor and mentee goals; make certain mentors share real-world knowledge; arrange for career support in the organization and between K-12, HE, and business institutions. ^m

Appendix 7: PREPGO Model Points (Continued)

Table 14.1 (continued)		
	<i>Definitions</i>	<i>Strategies</i>
O: Off to work	New leaders smoothly transition into their leadership role.	New leaders continue the succession planning steps in PREPGO ensuring recruitment, empowerment, preparation, and guidance of future leaders. Leaders also teach succession planning to staff. ⁱ

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