

Our Eight Month Transition Plan

What is happening? The next 8 months!

What we know and what we don't

Things at XYZ organisation are changing.

Right now the change that is happening is still taking shape. We have been able to confirm some new team members but recruitment for the Chief Operating Officer (COO) has not been finalized. The current COO will be transitioning out over the next three months starting from April.

I have put together this document for everyone to be on the same page about what we know and what we don't.

What we need from you:

1. HELP with Recruitment
 - Spreading the word as much as possible in your network
 - Assisting in researching on LinkedIn
 - Assisting in calls and setting up interviews
2. Open communications
3. Action and Solution oriented attitude

This Doc has:

1. What are we worried about?
2. What are we doing about it?
3. What is The Plan?
4. What is Plan A/B/C?
5. What is the current COO role post March?

1. What are we worried about?

Challenges/Concerns:

- Recruitment for the COO's role
- Program team size
- Workload manageability
- Fundraising and financing

We have two main approaches to managing these challenges:

1. Mitigating risk - by which I mean managing the variable within our control as best as possible
2. Pressure on external variables

2. What are we doing about it?

	Status Currently	Mitigation	External Variables
Recruitment for the COO Role	We're still recruiting for this role. We have a few candidates.	<ul style="list-style-type: none"> ● Reduction in amount of work for the team ● The CEO taking an active role in some of the team activities 	<ul style="list-style-type: none"> ● Professional help in Headhunting ● Aggressive LinkedIn advertising ● Allowing scope expansion of role for the right candidate
Recruitment of new team members	We have 3 team members as of now We have a huge number of candidates from which we will recruit two new members	<ul style="list-style-type: none"> ● Reduction in amount of work ● Using volunteers strategically 	<ul style="list-style-type: none"> ● Finalizing on last two candidates shortly
Workload Manageability	We have a number of projects on currently which will be completed in the next month.	<ul style="list-style-type: none"> ● As projects are being completed we have NO new projects planned until we are at capacity 	<ul style="list-style-type: none"> ● Keeping new projects at bay as much as possible
Financing and fundraising	All together we have ~60 lakhs INR in the bank. Giving us about 5 months of runway.	<ul style="list-style-type: none"> ● We are working on strengthening international fundraising ● Keep working 	<ul style="list-style-type: none"> ● We need to meet more funders ● Building fundraising capacity in international

		on contacts we have	chapters
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3. What is The Plan?

Key moments of the next 8 months:

<i>March</i>	<i>April</i>	<i>May</i>	<i>June</i>
Quarter planning for the existing team members Team retreat - business planning	Work on completing ongoing projects Field research work for the next project	Induction for new team members Start of the new project	Summer break ends School is back
<i>July</i>	<i>August</i>	<i>Sept</i>	<i>Oct</i>
Re-brand launch	Launch of: Business planning	Completion of 2 projects	MnE project commences

4. What is Plan A/B/C?

COO Role:

Ideal Scenario: *We hire someone before the current COO leaves*

- Person gets inducted by the current COO
- Person uses Summer Break time to get to know everything about XYZ and team

Likely Scenario: *We find someone who will join after the current COO has left*

- Person is coached via phone by the current COO and inducted jointly by the CEO and the team
- The CEO plays an active role in program management.

Worst Case Scenario: *We don't find anyone for quite a while*

- We engage external consultants as interim COO
- The CEO plays an active role in portfolio

5. COO's role post March:

- **Finalizing projects**
 - Documentation
 - Project Plan
 - Finalized Induction for new team members
 - Performance Reports
- **Coaching**
 - New COO's induction

Role Division between the current COO and the CEO: March-June

COO	CEO
March:	
<p>Regular Support to Team:</p> <ul style="list-style-type: none"> ● One on Ones with: <ul style="list-style-type: none"> ○ Staff ○ Volunteer team <p>Project Management of:</p> <ul style="list-style-type: none"> ● Performance Reports <p>Deliverables:</p> <ul style="list-style-type: none"> ● Oversee all project completion as per sync 	<p>Regular Support to Team:</p> <ul style="list-style-type: none"> ● Fundraising ● HR ● COO <p>Project Management of:</p> <ul style="list-style-type: none"> ● Staff Recruitment ● Rebranding ● Closing Finances <p>Deliverables:</p> <ul style="list-style-type: none"> ● Brand Guide finalized ● Appraisal process completed ● Meeting with key team members
April:	
<p>Regular support to Team:</p> <ul style="list-style-type: none"> ● One on Ones with: <ul style="list-style-type: none"> ○ Staff ○ Volunteer team 	<p>Regular Support to Team:</p> <ul style="list-style-type: none"> ● Fundraising ● HR ● COO <p>Project Management of:</p>

<ul style="list-style-type: none"> ● New team member induction <p>Project Management of:</p> <ul style="list-style-type: none"> ● Performance Reports ● Year's Project Planning <p>Deliverables:</p> <ul style="list-style-type: none"> ● Weekly conversations with the CEO about team performance and morale ● Oversee all project completion as per plan 	<ul style="list-style-type: none"> ● Rebranding Launch ● Staff Recruitment <p>Deliverables:</p> <ul style="list-style-type: none"> ● Rebrand launch ● Budget approved
<p>May:</p>	
<p>Regular support to Team:</p> <ul style="list-style-type: none"> ● One on Ones with: <ul style="list-style-type: none"> ○ Staff ○ Volunteer team <p>Project Management of:</p> <ul style="list-style-type: none"> ● Performance Reports ● Year's Project Planning <p>Deliverables:</p> <ul style="list-style-type: none"> ● Completed Year's Project Plan ● Oversee all project completion as per sync and AIP 	<p>Regular Support to Team:</p> <ul style="list-style-type: none"> ● Fundraising ● HR <p>Deliverables:</p> <ul style="list-style-type: none"> ● Successful fundraising Trip ● Relationship with three potential advisors
<p>June:</p>	
<p>Regular support to Team:</p> <ul style="list-style-type: none"> ● One on Ones with: <ul style="list-style-type: none"> ○ Staff ○ Volunteer team 	<p>Regular Support to Team:</p> <ul style="list-style-type: none"> ● Fundraising ● HR

Project Management of:

- Performance Reports

Deliverables:

- Remaining 50% of Performance Reports completed
- COO Induction