



EXECUTIVE SEARCH

Housing Authority of the City of Asheville

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Overview of Project

The Housing Authority of the City of Asheville (HACA) has grown to 10 public housing developments with 1,534 units, 248 special program units and administers the Housing Choice Voucher Program to subsidize housing for more than 1,355 low-income individuals and families. From the Great Depression to the Information Age, HACA has given families and others a chance to come home to a place that is more than just an address.

Armstrong McGuire has been asked to submit a proposal describing our recruitment and hiring process for their next Executive Director.

Why Armstrong McGuire?

Armstrong McGuire is a leading **executive search**, leadership, fundraising, and strategic advising firm that believes in unlocking the potential of organization leaders and the communities they serve. Founded in 2004, our experienced and diverse team of advisors works exclusively with nonprofit and foundation leaders to align strategy, optimize operations, build capacity, and lead nationwide searches that bring supremely talented individuals to high-impact organizations. We are guided by our **values** of integrity, experience, relationships, and results.

Our team members have served in leadership positions and as Board members, chairs, and volunteers. Our team has walked in your shoes, and we understand firsthand the unique challenges and opportunities that a leadership transition brings to an organization.

Armstrong McGuire is recognized for our client-centered approach, communicating effectively, and making ourselves available when you need us to ensure that together we are developing effective recruitment strategies and addressing important transition issues. We carefully manage your transition process, leaving you with the time and energy to focus on what matters most – finding your next leader.

Because of our exclusive work with nonprofit organizations, governments, and foundations, we have put intentional strategies in place for identifying, engaging, recruiting, and equipping leaders who bring their own lived experiences and diverse thoughts into the sector. Over the last five years, our searches have attracted over 13,000 candidates. Among those candidates 51% identified female, 39% identified male and 10%

declined to answer. Thirty-three percent of these candidates identified BIPOC, 53% identified white and 14% declined to answer.

WE MEET
CLIENTS AT THE
INTERSECTION
OF EXPERIENCE
AND EMPATHY



700

CLIENTS OVER
20+ YEARS

\$1B+

RAISED BY
OUR CLIENTS

550

SEARCHES
COMPLETED

17

STATES WHERE
PROJECTS
LAUNCHED

94%

OVERALL CLIENT
SATISFACTION
RATE

95%

WOULD WORK
WITH US AGAIN

ARMSTRONG MCGUIRE METHODOLOGY AND WORKPLAN

New leadership is a turning point in the life of any organization.

Armstrong McGuire utilizes a proven change management methodology in supporting clients through a leadership transition. Executive Transition Management (ETM) is nationally recognized as the best practice methodology designed to reduce the risks associated with executive leadership transitions, while positioning the organization for long-term success. The model is built around three primary phases—**Planning** for the transition through an assessment of the current position of the organization and the desired future envisioned by its leaders. Input is gathered from the board, staff, and key stakeholders and partners. This input helps to define the position profile of the next leader. If the current executive is still in leadership, this phase includes planning to help this leader end their time well. **Search** for the next leader based on the learnings of the planning phase and through strategic sourcing, recruitment and vetting of highly qualified candidates. **Onboarding** the new leader in an intentional way that sets clear expectations for the leader and the Board.



PLANNING

Phase One: Planning

Pre-search

Timeline: 4-6 weeks

1. **Convene a Transition Committee.** Armstrong McGuire will partner with the Transition Committee to:
 - a. Define Transition Committee members' roles and responsibilities in the transition and search as well as the role of other board and staff members.
 - b. Develop the communication strategy to be implemented throughout the transition.
 - c. If the ongoing executive is still in leadership, establish appropriate ways to celebrate their leadership and help them finish strong.
 - d. Determine appropriate ways to receive input from key stakeholders to help shape the position profile for the new leader.
 - e. Set key milestones for the transition and define logistics for the interview process.
 - f. Identify organizational or individual bias that could influence candidate evaluation.
 - g. Approve the position profile, recruitment plan, and candidate evaluation matrix.
 - h. Guide decisions in each phase of the process.

2. **Understand the Organization's Current Position.** Armstrong McGuire will:
 - a. Analyze relevant data, policies, and procedures. A checklist will be shared at the launch of our project requesting data and materials to review.
 - b. Meet with key staff to understand the operating culture, structure, programs, finances, and partnerships.
 - c. Conduct confidential interviews and/or small group discussions with 12-15 key external stakeholders.
 - d. Survey staff, board members, donors, volunteers, and community partners to explore their opinions about the organization's current direction, overall health, and its effectiveness in community engagement as well as the skillsets and attributes most needed in the new leader.
 - e. Evaluate the environment in which the organization operates.

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Phase Two: Search

Executive Recruitment and Selection Process

Timeline: 8-12 Weeks

1. **Strategic Recruitment of Highly Qualified Candidates.** The comprehensive recruitment effort is designed to attract a strong, diverse, and well-qualified candidate pool and typically runs 30 days. During this time Armstrong McGuire will:
 - a. Strategize with the Armstrong McGuire team to identify candidates of interest, candidate referral sources, and digital promotion.
 - b. Direct outreach to prospective candidates known to match the candidate evaluation matrix.
 - c. Call professional contacts in the nonprofit, foundation, education, association, corporate and government sectors who can refer us to prospective candidates.
 - d. Leverage relationships with local, regional, and national leaders and affinity groups with a goal to attract non-active job seekers with diverse lived experiences who may be willing to consider a dynamic opportunity.
 - e. Disseminate the profile to Armstrong McGuire's distribution list of 5,000+ members and our extensive social media platforms.
 - f. Work with HACA to post the position on the HACA website.
 - g. Distribute the profile to HACA board members, staff, key stakeholders, and partners who can share the opportunity in their networks.
 - h. Share the profile to appropriate professional associations or affinity groups.
 - i. Place strategic paid online advertisements.

2. **Vetting and Communication with All Candidates.** Armstrong McGuire receives all candidates through our online application tracking system and will:
 - a. Confirm receipt of application with candidates and review each application submitted.
 - b. Conduct virtual screening interviews with candidates who most closely align with the position profile and the candidate evaluation matrix.

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3. **Presentation of Candidates.** Armstrong McGuire will:

- a. Present a slate of the most qualified candidates with a summary of qualifications, resumes and cover letters.
- b. Provide the demographic information of the full candidate pool as disclosed by the applicants.
- c. Provide an alphabetical list of all applicants.
- d. Communicate with candidates who advance to an interview with the Committee and those who do not.

4. **Interviews and Selection Process.** Armstrong McGuire will:

- a. Execute all scheduling logistics.
- b. Provide recommended interview formats, questions, and activities (if appropriate) for each round of interviews.*
- c. Conduct reference checks.
- d. Help the Transition Committee prepare its recommendation to the Board.
- e. Support the Board Chair in making the offer.

**Behavior or personality assessments can be conducted with final candidates upon request. Additional fees apply.*

ONBOARDING

Phase Three: Onboarding

Positioning the new executive, the board, and the organization for success

1. **Create Onboarding Plan.** Many organizations assume that hiring a new leader is the final step in the transition. On the contrary, we believe that the post-hire phase is critical. In the onboarding plan, Armstrong McGuire will:
 - a. Define the assets the organization will provide and prepare for the new leader—computer, office, passwords to software and accounts, business cards, etc.
 - b. Affirm the communications plan and introduction of the new leader to the internal and external community.
 - c. Recommend the decision-making structure if an interim leader or outgoing leader is part of the onboarding. For example, the interim leader makes decisions in week 1 with the new leader’s participation. Week 2 is shared decision making and in week 3 the new leader is making decisions with input from the interim.
 - d. Identify key internal and external meetings/introductions for the first 30-90 days.
2. **Covenant Conversation.** At the first meeting after the new leader begins, Armstrong McGuire will facilitate a covenant conversation between the new executive and the board. In this conversation, Armstrong McGuire will:
 - a. Help the Board and the new executive determine the most critical priorities for the next 12 months.
 - b. Support the board and the new executive in setting mutual expectations about their respective leadership roles, responsibilities, and behaviors.
 - c. Draft a covenant document that summarizes a and b for the Board Chair and the new executive. This covenant agreement informs the working relationship between the new leader and the Board. It may also be a starting point for the annual performance review for the executive and the board.
3. **Integration into Armstrong McGuire Network.** Armstrong McGuire will invite the new executive to regular networking and professional development opportunities and share industry content to support their leadership.

DELIVERABLES

Planning Deliverables:

1. Aggregate analysis of present condition and feedback about the most critical skillsets and attributes of the next leader. The analysis is shared with board members and staff members in a presentation and also provided as a written executive summary. The analysis focuses on the following core areas:
 - Mission, Vision, and Strategy
 - Leadership (board and staff) and Culture
 - Finance and Fundraising
 - Strategic Relationships
 - Program Impact and Delivery
 - Operations and Management
 - Any other organization-specific challenge or opportunity areas
2. Position profile that outlines the leadership opportunity
3. Recruitment plan to guide outreach efforts
4. Candidate evaluation matrix that highlights the most critical skillsets and attributes

Search Deliverables:

1. Slate of vetted, qualified candidates
2. Full logistical support of all interviews, including scheduling, formats, and questions
3. Instruments for interviewers to evaluate candidates and provide feedback
4. Reference checks
5. Communication to all applicants as appropriate in each phase of the process

Onboarding Deliverables:

1. Onboarding plan
2. Covenant agreement between board and new leader
3. Monthly check-ins

LEAD COUNSEL



April D. Anthony, a Senior Advisor with Armstrong McGuire, will serve as lead counsel, providing leadership throughout each phase of work. They will be supported in this work by the firm's Principal, Bert Armstrong, and Managing Director, Shannon Williams, as needed.

April D. Anthony brings over 30 years of fundraising, board development, team building and executive coaching experience creating partnerships and recruiting diverse revenue streams for non-profits, for-profits, and institutions of higher education. April has served as an executive director and a senior level development professional with Boys & Girls Clubs of America, Make-A-Wish Foundation of Eastern North Carolina, Wake Education Partnership, Arthritis

Foundation, National Kidney Foundation, and the University of San Diego.

April is a graduate of Leadership North Carolina, a past president of the Triangle Association of Fundraising Professionals and a Professional Fundraiser of the Year awardee.

Learn more about the passionate individuals who make up the Armstrong McGuire team by visiting our [team page](#).

TIMELINE AND PROFESSIONAL FEES

Armstrong McGuire is committed to executing as quickly as possible while maintaining the integrity of the process. Typically, Executive Transition Management takes about 5-6 months.

Armstrong McGuire's fees for professional services for the ETM process described in this proposal is **30% of the selected candidate's accepted salary offer**, plus any assessment or search related expenses (i.e., job posting fees, photocopying of candidate materials, meeting expenses, candidate travel, if necessary, etc.). While direct outreach and recruitment are our primary sourcing tools, our experience tells us that it is important to promote your position through strategic online posting sites. Your advertising plan will be customized to the local, regional, national, and sector-specific sites that best match your opportunity. The ad plan expense is estimated to be \$1250. If the transition team requests advertising beyond this budget, we will discuss the merits of the additional expense and gain approval before posting.

Our commitment is to be a strategic partner in all facets of our work together and to represent HACA in a professional manner that reflects the organization's values and its mission. Armstrong McGuire team members make themselves available to the board and staff leaders whenever needed. We take seriously our commitment to being in partnership with you as you navigate the myriad issues and opportunities that come with a leadership transition. Similarly, we want to be good stewards of our client's resources and will seek advanced approval before incurring unanticipated costs.

Guarantee

As a retained search firm, Armstrong McGuire works as our Client's exclusive agent until a candidate is identified and accepts an offer of employment.

In the event a candidate hired in accordance with the approved Statement of Work terminates employment voluntarily or is discharged due to misconduct or unsatisfactory performance (determined in accordance with reasonable standards), within 365 days from the official date of employment, Armstrong McGuire will conduct a second search for no additional professional fee to HACA, except for any additional search-related expenses.

REFERENCES

Geoffrey Barton
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Mountain Housing Opportunities
Asheville, NC
919-239-0905
Geoffrey@mtnhousing.org

Kim Sanchez
Executive Director
Community Home Trust
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ksanchez@communityhometrust.org

Major Chuck Whiten
Area Commander and Corps Officer
The Salvation Army of Wake and Lee Counties
919-834-6733; Ext. 66833
charles.whiten@uss.salvationarmy.org

We are happy to provide additional references upon request and encourage you to review our list of [client partners and case studies of our work](#) with them.



LEADERSHIP DEVELOPMENT

- SUCCESSION PLANNING
- EXECUTIVE SEARCH, TALENT ACQUISITION & TRANSITIONS
- INTERIM MANAGEMENT
- RETREATS, TRAINING & COACHING

ORGANIZATIONAL DEVELOPMENT

- ORGANIZATIONAL ASSESSMENT
- ORGANIZATIONAL PLANNING & ALIGNMENT
- STRATEGIC PLANNING

PHILANTHROPY & FUNDRAISING

- PHILANTHROPIC STRATEGY
- RESOURCE DEVELOPMENT PLANNING & SUPPORT
- CAPITAL CAMPAIGN READINESS & FEASIBILITY

“We couldn't have made a better selection in a firm to help us identify and secure our new leader! Thank you for walking with us, keeping us hopeful and focused, and leading such a clean, equitable process.”

DEVONYA GOVAN-HUNT
Board Chair, Charlotte
Bilingual Preschool

