

## **Guide to Successful Nonprofit Executive Onboarding**

An executive transition is an exceptional moment in an organization's lifecycle carrying with it equal amounts of risk and opportunity. To ensure the organization experiences ongoing leadership excellence without interruption, thoughtful and strategic executive transition management is critical to ensure that the organization experiences a healthy transition and the new leader is set up for success. However, a leadership transition does not end with a hire. New leaders, especially those in the position for the first time, need intentional support and development as they build efficacy in the role. This level of onboarding—distinct from new hire orientation—is essential to a new leader's long-term success, yet often absent from many nonprofit transition processes.

### ***The Case for Onboarding***

*Daring to Lead 2011*, a national study of nonprofit leaders, found that among current executives, 33% followed a leader who was fired or forced to resign indicating the frequency of mishires and unclear expectations between boards and executives. Additionally, the study reports that after an initial honeymoon phase in year one when new leaders are excited and intellectually ready for the challenge, the learning curve becomes significantly steeper in years 2 to 3. It is in this period that many executives report lower levels of job satisfaction, higher rates of isolation, and a visceral fear as they begin to fully understand the complexity and enormity of the role. As with executive job happiness, satisfaction with board performance tends to be lower in this period as well. Newer leaders are particularly challenged by establishing effective relationships with their boards, and report disillusionment with what boards actually contribute with respect to strategy, resources, personal support to leaders within their first few years learning the organization.

### ***Real World Practice, Not More Conventional Wisdom***

These data reveal the complex and sometimes baffling nature of shared power and authority among executives and boards. Conventional wisdom tells us that boards are responsible for setting policy mandates and strategic priorities that executives must follow and manage. Real world practice tells us that executives know best the needs of their organizations, and that boards rely on their expert guidance and collaborative thought-partnership to realize organizational success.

Expecting boards of directors to independently design and monitor a tailored on-boarding plan for new executives is neither realistic nor pragmatic. We know from experience that in organizations with high functioning and impactful boards the executive director is usually central to

board work. We need to flip the conventional wisdom about board responsibilities to better match the way executives and boards partner in the real world. In this new practice, it is the new executive’s job—not the board’s—to initiate and lead the onboarding process.

***The Distinction between Onboarding and Orientation***

| New Hire<br>ORIENTATION  | New Executive<br>ONBOARDING   |
|--|---|
| <b><i>Purpose:</i></b>   | <b><i>Purpose:</i></b>  |
| Orientation is the process to welcome the new executive into the organization to assist in her/his assimilation. It generally includes introductions to other staff, information about the organization’s history, culture, mission, constituents, work environment, benefits, practices and policies, and organization chart. | Onboarding is inclusive of, but not limited to, all that orientation entails. It is the process of integrating and acculturating the new executive into the organization and providing them with the tools, resources, and knowledge to be successful and productive in her/his role.   |
| <b><i>Characteristics:</i></b>   | <b><i>Characteristics:</i></b>  |
| An event   | An ongoing process  |
| Short term<br><i>(e.g. a few days)</i>   | Long term<br><i>(e.g. first year)</i>   |
| Typically limited to new hires.  | For existing leaders transitioning from other positions in addition to new hires.   |
| Operational and transactionally focused.   | Strategically focused; aligned to organizational strategies and desired impact.   |
| Information is relevant to all employees and positions.  | Activities are customized to the specific skills, knowledge and experience of the executive relative to the current needs of the organization.  |
| <b><i>Outcomes:</i></b>  | <b><i>Outcomes:</i></b>   |
| Paperwork is completed and employees have general information about the organization and understanding of employment policies, practices, systems and processes.   | <p><b><i>Immediate:</i></b> Executive has completed orientation; has an articulated onboarding plan in place for the first year.</p> <p><b><i>End of First Year:</i></b> Executive had a successful first year; has completed activities and goals of the onboarding plan; is fully contributing to the organization’s outcomes; board has conducted a review; and executive has identified additional developmental needs for the next year.</p> |
| <i>Adapted from CompassPoint Nonprofit Services, TransitionGuides, and Getting on Board: A Model for Integrating and Engaging New Employees by Partnership for Public Service and Booz Allen Hamilton.</i>   |   |

**Recommendations for Evolved Practice**

1. Executive candidates should prepare for on-boarding by going through their hiring process attuned to where their current skills, knowledge, and relationships need to deepen, given what they are learning about the organization’s strategic priorities.
2. New executives should be mindful of their own strengths and weaknesses, the board and staff assets available to them, and those funders and stakeholders invested in their success, and should create a detailed on-boarding plan to share with the board and management team.

Rather than initiating and leading, the board’s role is to understand the critical importance of this process, to actively support the plan as it unfolds, and to evaluate the executive’s first year accomplishments relative to the plan’s objectives. If in year one, new executives focus—intentionally and transparently—on developing themselves in alignment with the organization’s goals, they will mitigate stress, increase the likelihood of their success, and enjoy the rich rewards of their deepening leadership capacity.

**Orientation and Onboarding Roles and Responsibilities**

| <p style="text-align: center;"><b>New Hire<br/>ORIENTATION</b></p>   | <p style="text-align: center;"><b>New Executive<br/>ONBOARDING</b></p>  |
|--|---|
| <p><b>Boards Role:</b></p>   | <p><b>Boards Role:</b></p>  |
| <ul style="list-style-type: none"> <li>• Send welcome letter verifying start date</li> <li>• Send letter of introduction to key stakeholders</li> <li>• Facilitate introductions to staff</li> <li>• Schedule a welcome event such as a lunch or reception</li> <li>• Ensure that the staff person responsible for HR conducts new employee orientation. If the executive is expected to oversee the HR function, ensure that a board member is assigned to conduct orientation.</li> <li>• Assign a board “buddy” to be available for questions.</li> </ul> | <ul style="list-style-type: none"> <li>• Discuss the relationship that the board wants to establish with the new executive.</li> <li>• Prepare a briefing for the new executive detailing organizational priorities and critical issues.</li> <li>• Clarify priorities, roles/responsibilities, expectations and performance measures.</li> <li>• Ensure that the new executive schedules meetings with key stakeholders.</li> <li>• Assist the new executive in developing an onboarding plan for the first year that focuses on the specific skills, knowledge and experience of the executive relative to the current needs of the organization.</li> <li>• Hold frequent check-in meetings to monitor progress towards the plan, provide support, and give feedback.</li> </ul> |

|   |   |
|---|---|
|   | <ul style="list-style-type: none"> <li>• At the end of the first year, conduct performance evaluation relative to the plan.</li> <li>• Assist the new executive in developing developmental needs and performance measures for the second year.</li> </ul>  |
| <p><b><i>New Executives Role:</i></b></p>   | <p><b><i>New Executives Role:</i></b></p>   |
| <ul style="list-style-type: none"> <li>• Schedule time to meet with individual staff and board members to begin relationship building.</li> <li>• If the board neglects to fulfill any of its roles stated above, take the initiative and request that they be done.</li> </ul> | <ul style="list-style-type: none"> <li>• Based on understanding of specific skills, knowledge, and experience, takes the lead in developing an onboarding plan for the first year.</li> <li>• Request the individual support of board members in the plan.</li> <li>• Seek out management skills training to close any skills gaps.</li> <li>• Seek out individualized support in the form of coaching, peer learning, or mentoring as complements (but not replacements) to the onboarding plan.</li> <li>• Discuss expectations of the board; clarify distinct roles and responsibilities between the board and the executive.</li> <li>• Provide the board with frequent progress updates to facilitate their monitoring of the on boarding plan.</li> <li>• Assist the board in conducting the first year performance evaluation.</li> <li>• Based on information from the review and learnings from the first year, establish developmental needs and performance measures for the second year.</li> </ul> |

**Organizational Goals:**

Indicate the high level organizational goals and/or strategic priorities for the coming 12-18 months:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Executive Onboarding Plan: Aligning Individual Learning with Organizational Goals**

To support the organization in achieving the goals listed above while simultaneously engaging in professional development to assist the executive in understanding her/his new role, use the following template to develop an executive director development plan.

| Focus Area  | Goals   | Plan your Actions  | Strengths/Weaknesses  | Support/Resources Needed   | Role of Board  | Timeline  |
|---|---|--|---|--|--|---|
| Specific areas of executive role to focus.                  | Consider the skills, knowledge and competencies of your role. Write specific goals describing how/what you want to develop, learn, change or improve. | Identify specific steps will you take to reach your goals. | Strengths I bring, weaknesses to mitigate, areas to enhance or further develop. | Identify those you will call on (e.g. coach, peers, board, mentor) to track your progress, gather advice and feedback and support your plan. | Expectations of the board for individual support and assistance. | Indicate monthly, quarterly, and annual targets as appropriate. |
| <b>Technical Learning: Management and Leadership Skills</b> | 1.  |  | Strengths I bring:  |  |  |   |
|   | 2.  |  | Weaknesses to mitigate:   |  |  |   |
|   | 3.  |  | Areas for development:  |  |  |   |

|   |    |  |                         |  |  |  |
|---|----|--|-------------------------|--|--|--|
| <b>Knowledge Enhancement:<br/>Field, topic, and industry.</b>                       | 1. |  | Strengths I bring:      |  |  |  |
|   | 2. |  | Weaknesses to mitigate: |  |  |  |
|   | 3. |  | Areas for development:  |  |  |  |
| <b>External Relationships:<br/>Stakeholders, Networks, Funders, and Communities</b> | 1. |  | Those I bring:          |  |  |  |
|   | 2. |  | Those I lack:           |  |  |  |
|   | 3. |  | Areas for development:  |  |  |  |

**Monitoring and accountability:**

1. How will the Executive Director communicate this plan, and progress towards the goals, with the board?
2. How will the Executive Director be accountable for its implementation?
3. How will success be measured?