



ONBOARDING GUIDE

**What Happens After A Leader Is Hired
Is As Important As Who Is Hired**

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Introduction

It feels like time to celebrate—and catch a deep breath—once your hire is official. While this is indeed a moment of celebration, it's also crucial to recognize the importance of the next stage: welcoming and integrating your new team member.

The onboarding process for a new hire is a critical phase that sets the tone for their success and the organization's future. It's important that the leadership team is engaged in managing a thoughtful and thorough process.

It may be easier to recognize the importance of onboarding and supporting a new hire when they are stepping into a challenging situation. However, deliberate attention to the onboarding process is equally important when the outgoing leader has been successful and long-serving. The team must be prepared to support the new hire as they navigate staff and stakeholder anxieties inherent in change, learn the organization, and ultimately, forge their own leadership path.

One strong approach to managing the onboarding process is to convene an Onboarding or Transition Committee. Members of this committee should meet regularly with the new hire to ensure that they have the support they need throughout the transition.

The onboarding transition should not be short-term; instead of days or weeks, the committee should frame the transition in a 12- to 18-month context.

This guide is designed to support the hiring manager and/or transition team in building a comprehensive onboarding process centered around **People, Things, and Expectations**.

People

The leadership team should consider who the new leader needs to know both internally and externally to the organization. This is a terrific opportunity to engage close collaborative partners and stakeholders and to expand these networks and relationships.

While not every role will require meeting each of these stakeholder groups, you should consider the below constituents based on the new hire's role and responsibilities.

- **Leadership Team:** Schedule introductory meetings with each team member to discuss their roles, expectations, and vision for the organization. Provide background materials on the organization's history, financials, plans, and goals.
- **Staff:** Arrange individual meetings with key staff members to introduce the new leader, discuss their roles, and learn about ongoing projects and initiatives.
- **Clients/Customers:** Welcome the new leader to engage with clients or customers to understand their needs, experiences, and perspectives on the organization's impact.
- **Key Funders and Donors:** Facilitate introductions to key funders and donors to express appreciation. Ideally, leadership members would join key meetings where there is a pre-existing relationship and where they can serve as a warm introduction.
- **Collaborative Partners:** Identify and meet with collaborative partners to strengthen relationships and explore new opportunities for collaboration.
- **Community Stakeholders:** Attend community events and meetings to connect with local leaders, organizations, and residents to build relationships and understand community needs.

Transition of Relationships

While some relationships will be best transitioned from the outgoing leader to the incoming leader, the transition committee can provide important continuity throughout the process.

Leadership members should consider when and how they partner with the new leader in building connections throughout the first year of their employment.

In addition to helping develop a list of people the new hire should meet, individual leadership members should commit to assisting in some of those transitions. Are there key relationships that can be leveraged? Can leadership members join the new hire at receptions, key donor meetings, and community events?

The organization could consider creating special events to celebrate the long-serving outgoing leader and to welcome the new leadership. This is an key opportunity to embrace the organizational legacy, history, and success while looking forward with enthusiasm toward a future with new leadership and direction.

Always, it is important to allow the new hire to form their own opinions and connections as well.

While relationships are “handed off,” there must be an understanding that the relationships will evolve. Some will grow stronger with new leadership, while others will diminish based on shifting priorities and collaborative styles.

Side Note: Hiring a Nonprofit Executive Director

The importance of the board role in onboarding a nonprofit Executive Director cannot be overstated. The board should remember that the role of a new Executive Director can be lonely and overwhelming and should encourage the new hire to find a support network.

Leadership circles, professional development, and one-on-one coaching can be of enormous value, especially for a first-time Executive Director.

The organization should take care in investing in the onboarding and professional support of the new leader to avoid burnout.



Things

The “Things” part of the onboarding process is, in some ways, the most straightforward and the most familiar.

Think of it as the equivalent to building an operations manual for the organization and/or this role. What are the operations and processes, the tools and materials, that the employee needs to know and have?

Operational considerations include:

- **Organizational Overview:** Provide a comprehensive overview of the organization's history, mission, values, programs, and impact.
- **Financial Management:** Review financial documents, budgets, and financial management processes to ensure understanding and compliance.
- **Human Resources:** Provide information on HR policies, procedures, staff roles, and benefits.
- **Facilities and Technology:** Provide access and orientation to facilities, equipment, technology systems, and communication tools.
- **Legal and Compliance:** Review legal documents, contracts, compliance requirements, and risk management protocols relevant to the role.
- **Funding Requirements:** Document and communicate any grant and funding requirements and expectations explicitly.
- **Committee and/or Board Management:** Review and hand off parts of committee participation or board management that is typically handled by the outgoing leader.



For nonprofits welcoming a new Executive Director or member of the senior leadership team, there are additional considerations around board management.

Board Management Considerations:

- **Preparation for Board Meetings:** Schedule and expectations for board meetings, including agenda setting, meeting logistics, and documentation.
- **Board Communications:** Access to and understanding of existing communication channels and expectations with the board, including any regular updates, reports, and feedback mechanisms. This can be a great time to evaluate the relevance of existing reports rather than simply perpetuating systems because that's the way they have always been done.
- **Committees:** Facilitate engagement with board committees, including committee meetings, updates, and support as needed.
- **Board Recruitment and Development:** While it is the board's responsibility to recruit new members, the ED often plays a key role in identifying organizational needs and helping to identify and recruit members. Clarity on this process, and the new board member orientation and training, is important. Providing a board chart with key considerations, needs, and roles that each board member fills is very valuable.

Expectations

This is probably the most important part of the onboarding process and the part that is most often overlooked.

The leadership team should be able to clearly answer these questions:

How will the new hire's performance and success be measured?

What are the expectations of this new leader?

What can the new leader expect in support?

In the case of a board hiring a new Executive Director, the board will need to pay careful and sustained attention to communicating their expectations and ensuring their ongoing support.

In building shared expectations, it's necessary to establish a common understanding of organizational goals and performance. Without clear, consistent, and measurable metrics for success, bias can be introduced when evaluating organizational performance and the new leader's performance.

The leadership team and new hire should all be familiar with the following:

- **Strategic Plan(s) and Mission, Vision, Values:** Review the organization's strategic plan, goals, and priorities to align efforts and strategies. Without a singular current strategic plan, review the component pieces and the clarity the leadership team can offer in terms of mission, vision, and values.
- **Programmatic Plan(s):** Review programmatic plans, performance, and goals.
- **Performance Metrics:** Define key performance indicators (KPIs) and metrics for success, including fundraising goals, program outcomes, and organizational growth targets.
- **Expectation Setting:** Establish clear expectations for the new hire's performance, responsibilities, and deliverables, including regular performance reviews and feedback mechanisms.

It is important for the leadership team to recognize that the new leader will have a different way of doing things than the outgoing leader. At times, this will feel challenging. Remember: different can be good, even as change is uncomfortable.

The transition will take time, and affording reasonable and clear expectations for measuring success is especially important during the first year of the new hire's tenure.

Conclusion

The onboarding process is a crucial opportunity to set the stage for the new hire's success and the organization's growth.

By focusing on **People, Things, and Expectations**, this guide aims to provide a framework for successful transition and long-term leadership. The Transition Committee will play a key role in supporting the new hire through this process, ensuring a smooth and effective onboarding experience.

Remember: This is a time of tremendous opportunity for the organization. A thorough and thoughtful onboarding process will pay dividends in establishing a foundation of success for the new leader, while also helping ensure that they are treated and evaluated fairly and equitably throughout the transition.

JUNE Partners is a SWaM-certified retained executive search firm that specializes in searches in higher education, academic medicine, and nonprofits.

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