

Onboarding a New Executive Director Outline for a First-Year Transition Plan

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INTRODUCTION

Bringing on a new Executive Director (ED) is a time of transition for the museum. Now that a new ED has been hired, the Board can begin the important next phase ensuring a successful transition. **The final step of the search is ensuring the transition through an onboarding process**, which will be an important factor in enhancing the new ED's success and longevity. This outline is a road map for how to get your new ED up to speed with the museum and with the community. It shows the ground that has to be covered. You may not need to do everything on this list, or you may have to add tasks; you will determine that, keeping in mind that prompt introductions to key stakeholders will be the number-one priority for the transition team. Once a plan has been developed, it can serve as the agenda for the scheduled transition check-ins.

Recognize that your ED is new to your community, and may feel isolated at times, especially if there are internal challenges that the new ED doesn't yet have the resources to manage. The Transition Committee (TC) and Board members in general should look for opportunities to help him/her create his own professional and personal circle within the community, as well as opportunities to develop professionally in order to better serve the museum. Remember, it can be "lonely at the top." Create communication channels and mentoring relationships so that the new ED will feel well supported.

Beyond the transition process for the new ED, there may be other transitions at the museum including staff turnover, which must be managed by the new ED with support from the HR staff person or an HR committee of the Board. Other transitions are not unusual and can be addressed by the new ED within your transition plan if necessary.

There is a lot of literature on organizational transitions when new leadership comes on board. Recommended online resources are listed in Appendix #2 at the end of this Plan Outline. It can be useful for someone on the TC to flag articles appropriate for various constituents – board members, the new ED, and staff – and share them as appropriate.

Remember, the transition process is a shared responsibility between the TC and the new ED. The TC need not carry all the weight and responsibility. Some experts feel that it is more important for the new ED to manage and lead the transition process following the plan developed by the TC. Arguably, the new ED has these issues top of mind anyway and therefore

may prefer to “manage up” to ensure that the transition tasks are accomplished in a timely manner.

Three Goals Forming the Foundation of the Plan:

1. **Orientation and Transfer of Institutional Knowledge.** To have an ad hoc Transition Committee (TC) or team appointed by the Board Chair to provide guided entry for the new ED into the museum’s chief leadership role, including knowledge transfer, introductions, and priority-setting. Within 6-12 months, the ED should smoothly assume the helm and by then, the Board will have returned to its usual museum oversight.
2. **Community and Donor Engagement.** Have a unified and timely schedule to introduce the new ED – to board and staff members, donors, community-members, peer and community organizations -- to ensure all stakeholders have opportunities to connect with the new ED and so the institution can leverage the arrival of the new ED for maximum marketing and donor benefit.
3. **Support, Mentor and Develop.** Identify strengths and weaknesses of the new ED’s skill set and provide assistance where needed and appropriate. Identify and provide mentorship, coaching, or professional-development opportunities for new the ED where needed.

Transition Committee Tasks Overview:

1. **Form the Transition Committee.** Establish a Transition Committee of 3-4 Board members, or a mix of Board and key knowledgeable stakeholders. The TC is appointed by the Board Chair, who will designate one member as the TC Chair. This group should start meeting and planning immediately, before the new ED arrives on site. Include someone who has worked with staff on special events, parties or receptions.
2. **Departing director party.** Plan an event to recognize the departing Director’s (or Interim Director’s) service (if appropriate), before the new ED arrives. Avoid trying to say good-bye to the departing director and hello to the new ED at the same event.
3. **New ED party.** Plan a special upper-level donor event or use an existing donor event to introduce the new ED to major supporters of the museum. Ensure that someone is assigned the job of making introductions. A short speaking opportunity for the new ED is a great way to say hello and deliver a message of thanks and introduction.
4. **Member and general audience event.** Plan a general event or use an existing event to introduce the new ED to museum members and the greater public shortly after arrival. A short speaking opportunity for the new ED is a great way to say hello and deliver a message of thanks and introduction.
5. **Set a TC meeting schedule.** Set a calendar to meet at set intervals with the new ED over the first 12 months to make sure plans are implemented. We recommend 1x/month for first 3-4 months, and then once each at 6 months and one year.
6. **Knowledge transfer.** Collect and deliver to the new ED vital documents and background information that pertain to the history and operation of the museum. Assign appropriate staff and/or Board committee chairs to share knowledge and explain processes in the first few weeks, and make sure the meetings happen.

7. **Donor and community engagement.** Draw up a calendar, assign individuals, and make checklists to ensure a full scope of meetings is set to meet key stakeholders (funders, government officials, potential new donors).
8. **Strategic planning.** With the new ED, the Board can update the strategic plan or begin to create a new one at the appropriate time during the transition, usually after the first few months have passed and transition progress is well underway.
9. **State of the Museum discussions.** Review and support the ED's evaluation of existing programs, plans and activities, and review new priorities with the new ED for the first 12 months. Provide board support for inevitable changes.

DETAILS of the PLAN

I. Preparation for Arrival of New Executive Director.

- Assemble Transition Committee (TC) and hold planning meeting.
- Hold a staff meeting with TC chair or liaison; gather input or ask staff to draft memo(s) on key activities, issues, and background information they think should be on the ED's radar – related to both the institution as well as to their own positions/departments.
- If necessary, conduct 1:1 meetings with key staff to prepare for transition.
- Compile list(s) of people the ED should meet and how they should meet, and who is the ideal introducer, if needed. Set that calendar and schedule meetings if possible.
- If not done, complete announcement/media roll-out for new ED hire – updates in newsletter and/or Annual Report, targeted updates to major donors, membership, others in the museum and business communities.

II. Orientation. Identify a staff person to help the ED physically get situated: ensure work papers are all signed, benefits processed, work station and computer is ready, keys, passwords, access, and cell phone are all taken care of. Have a key staff member walk the new ED around to personally meet staff.

III. Transfer of Institutional Knowledge. Deliver state-of-the-institution documents to the ED or indicate who has them/where they are. The ED should know where all historical and operational information sits. Areas without documentation should be flagged.

Appendix #1 is a checklist of typical documents organized by operational and department areas.

IV. Transition Timeline and Tasks. It is important to establish a timeline, meeting schedule and transition progress goals with the new ED early upon arrival. The transition timeline is divided into 30, 60, 90-day and beyond segments to create a progressive transition activity schedule. The new ED will be extremely busy, so mapping out the first year of key transition activities will help in understanding what should happen when. **Appendix #2** is a suggested timeline outlining key tasks and activities during the first year.

Conclusion. Successful leadership transitions are the result of regular, supportive communication with the new ED throughout the transition process. In addition to the scheduled TC interactions, the President (or Chair) of the Board has the particular responsibility of spending quality time on a regular basis with the new ED. Weekly calls, over-breakfast chats, etc., are critical to establishing the bond of trust, respect and support between the new ED and the Board President.

NOTE: The purpose of a Transition Committee and Plan is NOT to micromanage the Museum or the new ED. The primary purpose is to ensure a smooth transition and provide introductions, advice and guidance during the early months of onboarding so the new ED is better prepared to assume the top leadership role of the museum. The transition plan serves as a checklist enabling the new ED to take charge of the things the ED is responsible for and for the TC to focus on what it needs to do to be helpful.

The time goes by quickly after the arrival of the new ED and, without a plan, the valuable first months of “new voice/new leader” opportunities will be missed. If problems arise, be sure to talk them through with the new ED. In turn, the new ED should be encouraged to let the TC know if there are problems. It takes time and effort to adjust to the new ED, new ways of interacting and doing things. And the new ED is also experiencing a period of adjustment. Keep the lines of communication open and the response time quick. The new ED should feel that a successful transition is your highest priority.

Appendices

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APPENDIX #1

Transfer of Institutional Knowledge Checklist

The following checklist is a comprehensive list of documents including procedures, policies, guidelines and other relevant documentation that should be provided to the new ED. These documents, either in printed or electronic form should be assembled in advance of the new ED's arrival. For ease of access, a temporary folder could be created for electronic copies to be placed in the ED's folder on the museum server. It may be especially helpful to organize document folders similar to the major areas below.

A. Operations and Planning

- "About Us" – history, relevant documentation, mission statement, etc.
- Strategic planning documents
- Marketing plan, examples of past efforts and current "campaigns" and brochures. Key press people to meet
- Items needing immediate attention, "waiting for the new ED"
- Website and social media presence description
- Calendars of exhibitions, programming and events and rentals, back 2 years, and forward
- Opening/closing procedures and emergency procedures
- Audience/visitor information and statistics
- Computer systems and networks, and where to find documents

B. Staffing and HR documents:

- Organizational chart
- Job descriptions for all staff
- Employee handbook, if not provided already
- Description of benefits, list of providers, policies, etc.
- List of vendor contracts, as appropriate to ED's needs, and consultants currently in use.

C. Facilities documents

- Buildings and grounds descriptions and current pending issues
- Master plan and any accompanying documents
- If needed, floor plans, architectural drawings, facilities reports, and HVAC info, wiring and electrical information, etc.

- IT systems, networks support and needs
- Emergency systems, safeguards

D. Board of Directors

- List of board members and committees; board-member bios
- Past minutes and agendas (past 12-24 months)
- Bylaws and incorporation documents
- Meeting dates

E. Collections and exhibitions documents

- Collection records and database information
- Existing catalogues
- Collections policies
- Storage and conservation information and issues
- Exhibition schedules and plans underway; gaps in schedule to be filled

F. Financial documents

- Current budget, P&L, cash-flow documents; immediate needs and end-of-year goals
- 3-5 years of past budgets (or dashboards)
- Recent year audits
- As needed for the ED, names of bank accounts, investment accounts, debt, line-of-credit accounts. Restricted funds, limitations and issues
- List of pledges and planned gifts

G. Fundraising/Development

- List of top 10-20 donors, to meet
- Membership renewal system, levels, 3-5 year history of activity
- Individual donor list, history of giving
- Annual fund numbers, lists and goals, past 2-3 years
- Current and recent corporate and foundation benefactors
- If capital or endowment campaign – prospects, pledges, goal, plans, naming opportunities, etc.
- Any other information deemed relevant, such as grants for general support describing the organization, major PR pieces on the museum, etc.

APPENDIX #2

Transition Timeline and Tasks

This transition timeline is divided into segments to help with sequencing and prioritizing during the 30, 60, and 90-days and beyond in the transition process. The suggested tasks are situational and may need to be re-prioritized.

A. Days 1-30: GOALS: MAKE INTRODUCTIONS, UNDERSTAND FINANCES, MATTERS FOR URGENT ATTENTION, LEADERSHIP AND MANAGEMENT (Responsibility: Board Chair, TC and ED)

- ED and Board Chair and/or Executive Committee meet: explain how THIS board works: who does agenda, what are expectations, what are committees; how are decisions made
- Introduce ED to full board. ED sets one-on-one meetings over first 1-2 months. ED starts to meet top donors
- Set and/or host Welcome Party for new ED with key donors and stakeholders (can be paired with event already on calendar, if appropriate)
- Board Chair and ED together draft initial agenda for first Executive Committee/Board meeting
- ED reviews staffing situation, staff feedback, if any
- Treasurer/Finance Committee Chair: Introduce key financial documents to ED; review together
- Review Development plans, annual fund, donors, collateral, goals, etc.
- Identify areas of strength and weakness with ED skill set: does ED need help with development? Exhibitions? Technology? Help make plan to assist

B. Days 31-60: GOALS: UNDERSTAND MISSION & VISION, STRATEGIC PLAN, BEGIN TO SET PRIORITIES Responsibility: ED

- Continue introductions and meetings with top stakeholders.
- Review strategic planning documents. Set calendar date for review or simply continue forward if the strategic plan is current or a future planned activity.
- Draft a transition roadmap – museum projects, staffing changes, board meetings, calendar appointments, urgent matters – as needed.
- ED should begin to set Annual Goals for him/herself and museum, working with Transition Committee. After 3 months of an orientation period, the new ED can be expected to start having and implementing some plans, and to have the full picture after 6 months.

C. Days 61-90: GOALS: MARKETING, UNDERSTANDING VISITORS AND DONORS Responsibility: ED

- Review branding and marketing plan

- Review staffing structures, budget targets: does anything need to be re-considered for the future?
 - Update board on Annual Goals plan
 - ED to provide assessment of structure and functionality of operations for coming year; suggest areas where s/he will want support
- D. At 6 months, 9 months, one year.** Responsibility: ED, TC, Board Chair and Executive Committee, as appropriate
- Check in with ED – Where are successes? Where are challenges?
 - Are there areas for training and career development that could be pursued?
 - Discuss Annual Performance Evaluation process. Executive Committee does 6-months' performance review. Set the date for one-year anniversary review.
 - Assess 12-month progress and set next 12-month goals.

APPENDIX #3

Recommended Online Resources

The following online resources are a sampling of information available regarding onboarding and successful executive transition management. While focusing on non-profit leadership transitions, additional information from the private sector transition management may be helpful.

- **The Nonprofit Board's Role in Onboarding and Supporting a New CEO**
<https://www.bridgespan.org/insights/initiatives/leadership-development/nonprofit-boards-role-in-onboarding-a-new-ceo>

- **Executive Onboarding: Getting to the Executive Transition Finish Line**
<https://nonprofitnotes.com/executive-onboarding>

- **Guide to Successful Nonprofit Executive Onboarding**
<https://www.hawaiicommunityfoundation.org/file/cat/New-ED-Onboarding-Guide-and-Template.pdf>

- **Your First 30 Days as a Nonprofit Executive Director**
<https://www.joangarry.com/your-first-30-days-as-a-nonprofit-ceo/>