

Onboarding: Tips for Transitioning into a Senior Nonprofit Role

Successfully transitioning into a senior nonprofit management role takes teamwork. Both the individual taking the position and the organization welcoming the new hire should be equally committed to making the onboarding process a success.

Even the most confident professionals feel some understandable anxiety when starting a new job. And people moving into positions of senior leadership at a nonprofit—however experienced—aren't immune from such anxiousness. Luckily, there are numerous ways in which both the new recruit and the organization can make the transition easier—and pave the way for success over the long haul.

Onboarding—a systematic method for transitioning new staffers, including senior leaders—starts during the interview process and lasts well into the first year on the job. While important for anyone taking on a senior nonprofit role, it can be especially important for the for-profit professional moving into the nonprofit sector. The transition from a hierarchical, bottom-line-oriented corporate culture to the mission-driven, consensus-oriented nonprofit milieu can be quite challenging. Being aware of the challenges can make this change easier to manage.

In this article, we explore the challenges that can arise during the onboarding process and offer steps that individuals and organizations can take to help the transition succeed.

The Interview Sets the Stage

The interview is not just an opportunity to demonstrate one's capabilities. It's a process through which the job candidate can assess how closely his or her goals, desires, and work style match that of the organization's. From the organization's perspective, it's an opportunity to ensure the individual is the right candidate. For both parties, the information gathered—both strategic and tactical—can help plan a successful transition.

That's the view of Chuck Carter, chief operation officer (COO) of [Crittenton Women's Union](#), a nonprofit organization promoting women's economic independence, based in Boston. Carter, who became Crittenton's COO in 2007, had been looking for a second-in-command position at a nonprofit where the chief executive officer (CEO) would be willing to mentor him in becoming a CEO in his *next* position.

During interviews, Carter asked CEOs how much coaching they'd provide. Moreover, he explored the extent to which he'd be able to help drive the direction of the organization. (He accepted the Crittenton position, he said, in large part because of CEO Elizabeth Babcock's answers to his questions.) From a tactical perspective, he learned how Crittenton's various teams worked and how, as a COO, he would be expected to help them perform—particularly important for Carter, as he oversees a staff of 100.

He also tried to clarify his role as the CEO's potential new "partner" by asking, "Who would be responsible for which tasks, and by what processes would they settle conflicts?" In fact, discussing how the CEO and COO would work together later helped Carter and Babcock overcome a crisis that arose at the time Carter started his new position. The details are less important than the fact they were able to work in tandem right from the beginning.

Before the Start Date

It can take six months or more to fill a nonprofit senior leadership position, and once an offer is accepted, an organization frequently wants the recruit to start immediately. However, the organization and the individual need time to prepare. And, there's plenty that a new hire and the nonprofit can and should do before the first day.

Ask for information. Often organizations provide detailed information to candidates. "We urge even at late stages in a search for there to be a real disclosure of important information, sometimes necessitating a non-disclosure agreement," Kathleen Yazbak, a former Bridgespan Group partner and founding member of the firm's executive search team, said. Sharing such information, she said, is necessary to help prepare the new hire for the role and to help them know what pressing issues the organization might be facing.

When one nonprofit recently hired a new field operations chief, he couldn't start for six weeks, recalls Yazbak. To help him ramp up, the organization's human resources staff gave him budgets, case studies, strategic planning documents, program information, board books, and a list of coming events and required technical training. Having such exhaustive information before his start helped the new operations chief become familiar with the processes and goals of the organization. A point person in the organization also coordinated meetings with key staff and stakeholders, including the CEO, before his start.

"When this person joins the organization, he'll be able to hit the ground running and may, in fact, be in a better position than he would have been if he'd joined two weeks after he accepted the job," Yazbak said.

Bridgespan Partner Wayne Luke urges CEO candidates to attend summer outings, firm-wide retreats, and other company meetings. "The purpose is to put names to faces and to create environments where the new candidate can see how cultures work, what the informal behaviors and norms are in the organization, and the way people interact with each other," he said.

An individual who uses this time to prepare thoroughly can often be more confident and sure-footed when starting. An organization that encourages this type of preparation can help get the new hire up to speed quickly in key responsibilities and demands.

Once You Start

Define success. What will success look like in 30, 60, and 90 days? What will success look like one year out? According to Yazbak, defining success means taking a “holistic walk, from the job description, which should be thoughtful, to deeper conversations over the interview process about ‘what success will look like.’” “Invariably,” she said, “that leads to goal setting around what’s important versus nice to have in the first, hectic months.”

Setting short-term, measurable goals is an excellent way to clarify expectations. It’s a technique used by Jeffrey Lissack, vice president, finance and administration for [Peace First](#), which is dedicated to building effective school climates by focusing on teaching children the skills of conflict resolution and civic engagement, and providing educators with the critical skills and knowledge to integrate social-emotional learning into the school’s curriculum and culture. Lissack said his organization uses a highly structured onboarding process that feeds into the annual performance review cycle. A new hire creates a one-month work plan with his/her supervisor, preferably within the first week. They have a formal check-in at the end of the first month, and then again in three, six, and 12 months. “We’re good about following that process and giving honest feedback,” Lissack said. He said this structured process helps people keep an eye on strategic goals. “It is easy for people to get swamped up into the urgent over the important. This process helps people think about the big picture and think hard about the work.”

Setting goals can also set an “early tone in terms of feedback, accountability, and one’s ability to effectively communicate with his/her boss,” said Bridgespan’s Luke. “Getting started on the right foot will be important for building access and an open dialogue in the reporting relationship.”

Prioritize. No one can make it through the day-to-day demands of managing a nonprofit without prioritizing. Given nonprofits’ mission-driven focus and multiple stakeholders, making choices can be particularly difficult.

This challenge resonates with Lissack’s experience when he joined Peace First. “My first 90 days had a lot of urgent [tasks], and that was okay, because it was important for me to learn the job, and that was one way to do it,” he said. However, Lissack also credits the formal onboarding process with helping him to stay focused on his day-to-day priorities, despite having to address critical issues that arose early on.

Build relationships. Because nonprofits are so relationally driven, veterans say you should build relationships inside and outside the organization as quickly as possible.

Yazbak and Luke both recommend setting up “key meetings” during the first 60 days. People to meet with can include donors, board members, key reports, and perhaps the outgoing executive.

Crittenton’s Carter met with department managers early on and talked to them about his work style, which he said relies on honest, open communication, and flexibility. He also talked with them about where he wanted to take the departments.

He quickly built external relationships, as well. “I have to work with the neighbors who live near the programs, with contractors, and with sister agencies,” said Carter. His predecessor had set up recurring meetings with the various organizations that connect with Crittenton, and Carter made sure to attend them. Carter advises scheduling these outside meetings right away. “It’s always insightful to get other people’s perceptions of your organization as well as what’s going on in the field and the work you do,” he said. “And the sooner you do that the better.” Moreover, he points out, one typically has more time to schedule external meetings during the onboarding process than later.

[Massachusetts Legal Assistance Corp.’s](#) (MLAC) Deputy Director Beth Chandler offers this advice: create your own relationships with external people—don’t ride on your CEO or board chair’s coattails. Within the first couple of weeks of her start, Chandler’s executive director introduced Chandler to all 17 of MLAC’s grantees. She found the meetings helpful, especially for learning from MLAC’s grantees what they expected from her and how she could help them. “But I probably should have followed up sooner with meetings on my own,” she said. “For anyone in management it’s important to have your own relationship with important clients, funders, and grantees.”

Learn the speed limit. New senior leaders moving from the for-profit sector—or even from one nonprofit to another—need to be mindful of the culture of the nonprofit. The new leader needs to be sensitive to the organization’s culture to ensure he/she doesn’t ramp things up too quickly.

For this reason, many new leaders often find that they need to slow their decision-making pace—at least at first.

Chandler heartily agrees. She overhauled MLAC’s grantee application process after only three months in her new position. From her initial standpoint, she was making the application more comprehensive to acquire better data. In retrospect, though, she feels that her dramatic overhaul was a mistake. Completing the applications “...ended up being a lot more work for everybody,” she said. By making applications more complicated, she now realizes, she forced grantees to spend more time applying for funds and less time doing the work that benefited their clients—an unwelcome consequence. Using input from grantees and staff, Chandler later simplified the application process.

Ask for one or more mentors. New senior managers should have a partner in the firm who is helping them through the onboarding process. New leaders could even seek out two mentors, relying on one as a confidante and another as an adviser through whom he/she can learn the professional aspects and responsibilities of the new role.

If you’re starting as a new CEO, seek out mentors who are on your organization’s board. One board member can offer guidance on the strategic planning process and board personalities; another can introduce the new CEO to funders. A new senior manager also should work with an experienced staff member who feels free to brief him or her on the personalities, strengths, and struggles of junior team members.

Mentors also can alleviate a disconcerting sense of isolation—one that can surprise professionals moving into senior positions. When Chandler moved into the No. 2 position

at MLAC five years ago, for instance, she came from middle management at another nonprofit, where, she said, “There were lots of people at my level.” At MLAC, she said, “It feels a little more isolating having moved up.”

If the new organization can’t provide adequate mentor opportunities, take the opportunity to establish mentor relationships with senior professionals at other organizations. Often these relationships are available through professional organizations (both in person and online) and through other networking groups.

Like Chandler, Peace First’s Lissack was one who also found his new role somewhat isolating. He looked for peer support outside the organization, but didn’t readily find it. Later, after the Bridgespan COO peer group was founded, he joined. In the interim, he sought advice from the Peace First’s auditor and some vendors. If he had to do it again, he said, he would make it a priority at the outset to find moral support. “There’s a lot within the CEO/COO relationship that by necessity is confidential. It’s really helpful to get some perspective,” he said. “No one else will be in exactly the same situation, and no one is the sage. But hearing how someone else has handled a similar situation is helpful.”

Murphy’s Law. As mentioned, Crittenton had a crisis three days after Carter started. He and Babcock had planned a comprehensive onboarding process with performance goals for each of the seven departments he oversees, as well as directional goals for the organization as a whole. It included a systematic strategy for understanding Carter’s research, programming, and human resources responsibilities, and outlined a method for thinking about the organization’s hiring and training needs.

“The crisis sidelined the comprehensive orientation strategy and consumed a lot of my time for most of the first year,” he said. However, by relying on teamwork and a clear understanding of desired outcomes, he and senior management were able to survive while still progressing toward long-term goals. “Although I was in crisis mode, we developed some goals that were outside of the domain of the crisis,” Carter said. “We thought it was important to work on some limited projects,” he added. “We also discussed the overall strategy of the organization for the coming year, including measurement tools and timetables for identifying and developing organizational goals.”

Carter said the crisis actually provided some unexpected onboarding advantages. “It gave me a lot of valuable information that would have taken me a lot longer to figure out, because usually there’s a honeymoon phase during which people are very polite,” Carter said. “You have to learn over time what a program’s strengths are; and in the middle of a crisis, all of that information comes out in full force. I also believe it gave me a different level of credibility that may have taken longer to earn.”

Starting a new senior management position at a nonprofit is exciting, but it's not easy. Plan for success by:

- Exploring the ways in which key staff members—CEO, board members, etc.—will partner with you going forward;
- Getting up to speed on the organization before you start, by requesting comprehensive information and attending important events and meetings with key stakeholders;
- Creating one-, three-, six-, and 12-month goals and work plans;
- Prioritizing the day-to-day as well as the strategic goals—being sure to limit your goals in the early days, especially if your position is newly created;
- Learning the culture before you make many changes, especially when moving from the for-profit world;
- Building relationships internally and externally as early as possible;
- Finding mentors and peer support—enlisting inside team members and board members to help you along the way, and/or joining outside organizations and social networking groups; and
- Communicating frequently with senior team members, especially if entering a new role during a crisis.

THE BRIDGESPAN GROUP

BOSTON 2 Copley Place, 7th Floor, Suite 3700B, Boston, MA 02116 USA. Tel: +1 617 572 2833

NEW YORK 112 West 34th St., Ste. 1510, New York, NY 10120 USA. Tel: +1 646 562 8900

SAN FRANCISCO 465 California St., 11th Floor, San Francisco, CA 94104 USA. Tel: +1 415 627 1100

MUMBAI Bridgespan India Private Limited Company, 1086, Regus, Level 1, Trade Centre, Bandra Kurla Complex, Bandra East, Mumbai, 400051 Maharashtra, India. Tel: +91 2266289639, Email: contactmumbai@bridgespan.org

    www.bridgespan.org

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