

Sample Leadership Agenda

Organizational Priorities and Action Plan

- What are the three to six priorities and goals for the organization over the next 18 months?
- What are the respective roles of the new leader, board, and senior staff in achieving those priorities?

	NEW LEADER ROLE	BOARD ROLE	STAFF ROLE
PRIORITY #1			
PRIORITY #2			
...			

- What are the milestones that will be used to assess the new leader’s performance over the next 6, 12, and 18 months?

	6 MONTHS	12 MONTHS	18 MONTHS
PRIORITY #1			
PRIORITY #2			
...			

Organizational Capacity Plan

- What changes will the organization need to accomplish—including changes or additions to staff, additional fundraising, or other items—to fulfill its priorities?
- What additional support will the organization need to achieve its goals? Should it engage consultants, hire a coach for the board, or take other steps?
- What types of support does the new leader need over the next 18 months to realize her full potential? Should the board arrange for coaching, mentorship, networking, or attendance at regional meetings or trainings?

Source: The Bridgespan Group

Sample Orientation Plan

To be developed by the transition committee in anticipation of the new leader's arrival. If possible the exiting executive should have input to help identify critical issues.

Communicating the Transition: For each group, identify key stakeholders to be notified and how to notify them. What is the appropriate medium (personal outreach, press release, all-staff meeting, other), and what are the key messages that need to be communicated?

- Staff
- Key Donors
- Other Close-In Stakeholders (collaboration partners, etc.)
- Other Community Stakeholders (powers-that-be in the community)
- Broader Public

Key Meetings to Attend: For each group, identify the key meetings and events the new leader should attend to get up to speed. Are there any must-attend events—internal program or operations meetings, meetings with key stakeholders, or community or partner meetings—scheduled before the new leader's start date?

Learning the Organization: For each group, assemble key documents/resources for the new leader to read and schedule briefings with key staff to help the new leader get up to speed.

- Programs
- Finances
- Fundraising
- Marketing
- Board Engagement

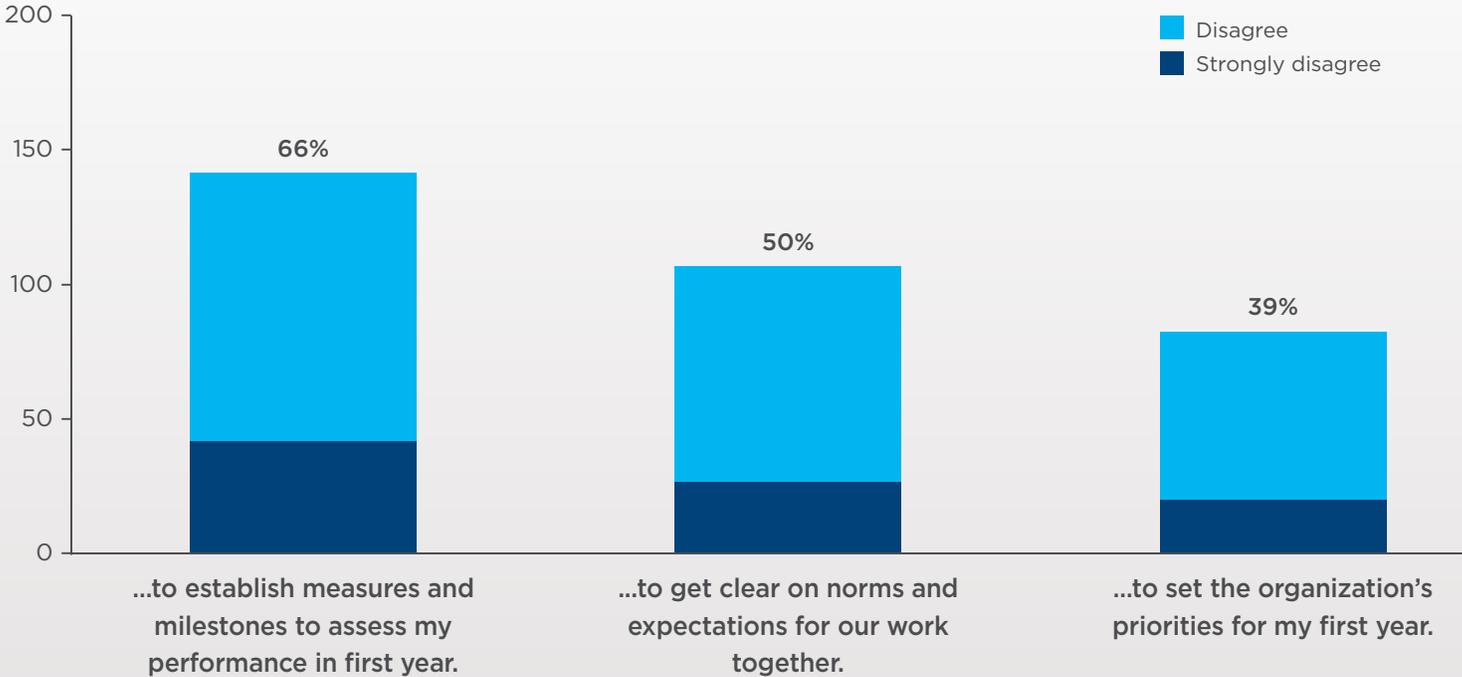
Building Relationships: For each group, identify key stakeholders to be included and the outreach plan for each, including who will make the introduction and how the new leader will engage with them.

- Staff
- Board Members
- Key Donors
- Other Close-In Stakeholders (collaboration partners, etc.)
- Other Community Stakeholders (powers-that-be in the community)

Source: The Bridgespan Group

Nonprofit CEOs and their boards struggle with working together effectively during the onboarding process

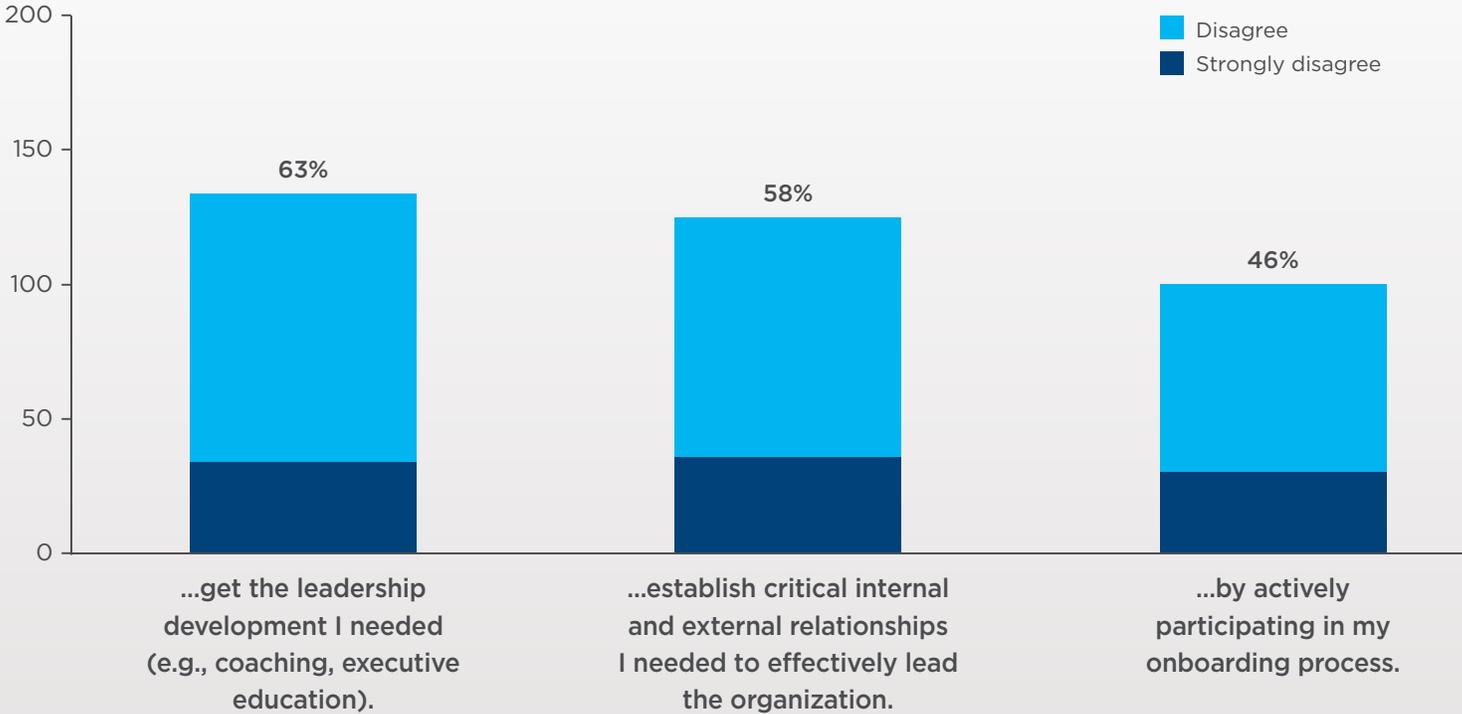
The board and I worked together effectively...



Note: In a June 2014 Bridgespan Group CEO survey, 214 nonprofit organization chief executives rated statements about their boards' effectiveness and involvement in the onboarding process on a scale from strongly disagree to strongly agree.

More than half of nonprofit CEOs receive little or no support in their development as leaders

The board helped me...



Note: In a June 2014 Bridgespan Group CEO survey, 214 nonprofit organization chief executives rated statements about their boards' effectiveness and involvement in the onboarding process on a scale from strongly disagree to strongly agree.