

Drinking from the Hose: Is Your Executive Onboarding Program Effective (and Sane)?



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Transitioning into any new job is often compared to drinking from a fire hose. How quickly can you learn everything about your new role and organization? How long will it take for you to fit in and live out the culture, policies, and expectations of your new workplace? And how can you apply your past experiences to make a meaningful impact on your colleagues and clients?

Now imagine the enormous pressure and transition trepidation that you might face as the newly elected President of the United States.

That's what writer Melanie Padgett Powers explores in her article, "[Executive Onboarding Lessons from Presidential Transitions](#)," published by the Society for Human Resource Management (SHRM) on August 25, 2016. The article relays the evolution of Presidential onboarding and the improved management of the selection and onboarding of a President's appointees. In recent years these processes have been facilitated by the Partnership for Public Service, a Washington DC-based nonprofit that aims to strengthen the civil service and systems that support it. As I read Powers' article, I was shocked to learn that throughout much of our nation's history, transitions between administrations have occurred organically, with little to no formal onboarding for incoming officials. According to a transition timeline that follows Powell's article, after the September 11 terrorist attacks in 2001, then-President George W. Bush recognized just how vulnerable our country is during shifts in the administration. The Bush administration adopted the first formalized Presidential transition and onboarding processes, and later provided the incoming Obama administration with guidance on agency work plans, as well as hands-on experience for the new President during tabletop exercises.

If Presidents haven't been planning to onboard their own successors, then many nonprofit leaders likely face the same challenge. While some of the Center's nonprofit clients dedicate tremendous thought and resources to managing the transitions of their CEOs and other senior leaders, oftentimes succession planning and onboarding are hailed as key risks during Center-led risk assessments.

Luckily, we have some simple tips for managing leadership transitions, and in her article, Powers shares other ideas that can be applied at your nonprofit. Powers invited Tina Sung, vice president of government transformation and agency partnerships at the Partnership for Public Service, to share the lessons her team has learned about Presidential transitions and onboarding.

- **Make onboarding systematic and essential** – Sung states that onboarding for leaders must be viewed as critical and exceptional—not optional or generic. Demonstrate the value of onboarding and engage leaders by offering essential, practical advice and practices that previous leaders relied on (or wished they had when they took up the mantle). Be sure to highlight the unique aspects of your organization. Keep in mind that if you conducted a thorough search process, your new CEO won't need or appreciate generic presentations on the nonprofit's history or structure. Onboarding should be organized and systematic enough that leaders recognize its concrete goals and outcomes.
- **Choose the right faculty to design and deliver executive onboarding** – How can you make your onboarding curriculum truly practical and indispensable as discussed above? Start by leveraging the experience and wisdom of past leaders who can provide real guidance to your incoming staff. Perhaps Sung's best advice on developing executive onboarding is to "use practitioners who have walked in their shoes." Sung does not hire professors or consultants to prepare onboarding courses for public officials; instead, she engages real role models who have held similar roles as the individuals being onboarded. This ensures that incoming leaders are not simply lectured at—"they're there to get honest advice," and honest advice they receive.
- **Present information in a format suitable for your new leader(s)** – During her onboarding programs, Sung delivers easy-to-digest information that is packaged into short courses, because "executives don't have time to spend a full day or multiple days taking courses." After providing the essentials during a brief, digestible course, Sung offers follow-up, nitty-gritty courses that public officials can access at-will. The key is to reduce the 'fire hose' sensation as much as possible, to free up time for leaders to take action, and to personally identify the areas in which they desire additional training.
- **Conduct a listening tour with external and internal stakeholders** – Empower your incoming senior leaders to acquire a holistic perspective on your nonprofit as soon as possible. When you onboard a new CEO, facilitate a tour so he or she can interact with your nonprofit's key donors, funders, partners, and vendors during the transition. The new CEO will be better positioned to understand your organization from a systems perspective when making his or her initial decisions on the job. Similarly, a tour with employees and volunteers presents multiple benefits, including the shoring up of confidence that internal stakeholders have for their new leader, and a budding connection between the staff and CEO. Don't forget to tour the board as well—if your CEO doesn't already plan to personally reach out to board members during the first week on the job, then encourage him or her to do so. This is a pivotal time for the CEO to connect personally to each board member, and it's vital that these connections are made long before the CEO's first official board meeting.

Onboarding can often be overwhelming and intense, whether you run a complex, national, or international nonprofit with a budget of \$500 million or you run a neighborhood nonprofit with a small team and a budget of \$500,000. Take action today to ensure that your next nonprofit leaders (or your own successor) will have an easier time taking up the mantle and continuing the legacy that you have built.

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