

Executive Director Onboarding Plan

Having a well thought out onboarding plan will help the Executive Director integrate smoothly into their new role and contribute more effectively to the organizations mission.

This resource contains suggestions on what to include in your onboarding plan. It is important to tailor this based on the specific needs and nuances of your organization. Remember, that regular communication and timely feedback are key components of any successful onboarding process.

Preparing for their Start

After the offer letter is signed and returned and any pre-employment screening and referencing checking is completed, your next step is to make sure that when the Executive Director arrives they are set up for success. You may need to engage with other departments or vendors to set up accounts and procure equipment.



If you have ever started in a new job and had no computer, or system access, you know how frustrating that can be - so don't delay on getting these items squared away so your new ED will feel welcomed!

- Welcome Email:
 - Send a warm welcome email to the Executive Director a week before their start date, including essential information like the first-day schedule, parking details, and any paperwork they need to complete.
- Prepare Workspace:
 - Ensure that the executive's workspace is set up with necessary equipment, office supplies, and any relevant materials.
- Technology Setup:
 - Set up computer systems, email accounts, and access to relevant software platforms. If you've had multiple people assisting with tasks that will be taken over by the ED, you may want them to list out all the tools and systems they use so you can make sure nothing gets missed.

Week 1: Orientation and Introduction

Maya Angelou said “People will forget what you said, people will forget what you did, but people will never forget how you made them feel.” Keep this sentiment in mind as you arrange the plan for your new ED’s first week.



Welcome Orientation

- Conduct a comprehensive welcome orientation to introduce the Executive Director to the organization's mission, vision, values, and key staff members.

Overview of Policies and Procedures

- Provide a detailed overview of organizational policies, procedures, and expectations.

Meetings with Key Staff

- Schedule one-on-one meetings with key staff members to facilitate introductions and provide an overview of their roles.

Connection to Board Members

- Arrange a meeting with key board members to foster early connections.

Month 1: Immersion and Understanding

In-Depth Program and Operations Review

- Provide an in-depth review of the organization's programs, operations, and key initiatives.

Financial Overview

- Schedule a meeting with the finance team to provide an overview of the organization's financial structure, budget, and reporting.

Meetings with Stakeholders

- Facilitate meetings with external stakeholders, donors, and partners to build relationships and gain a deeper understanding of external perspectives.



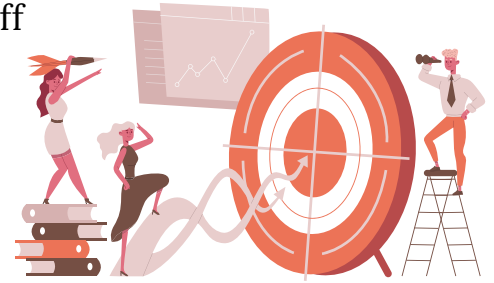
Month 2: Strategic Planning and Goal Setting

Strategic Planning Session

- Conduct a strategic planning session with the Executive Director, board members, and key staff to align on organizational goals and priorities.

Goal Setting

- Collaboratively set performance goals for the Executive Director's first six months and the first year, aligned with the organization's strategic plan.



Ongoing Support

It is critical for both the ED and your nonprofit organization that there is ongoing and frequent check-ins. Even great leaders need support. The Board of Directors is a key component of the support system for the EDs success not just in the beginning of their employment but for the duration of their time in the role.

Mentorship and Coaching

- Assign a mentor or coach to support the Executive Director's professional development and provide guidance.

Regular Check-ins

- Schedule regular check-in meetings to address any questions, concerns, or challenges the Executive Director may be facing.

Professional Development Opportunities

- Identify and provide opportunities for ongoing professional development, such as workshops, conferences, or training sessions.

Feedback Mechanism

- Establish a feedback mechanism to gather insights from the Executive Director and their team regarding the onboarding process and areas for improvement.

Social Integration

- Organize team-building activities and social events to help the Executive Director integrate into the organizational culture.