



EXECUTIVE ONBOARDING CHECKLIST

FOR FAITH-BASED
NONPROFITS

Executive Onboarding Checklist for Faith-Based Nonprofits



40 percent of new executives... fail in the first 18 months.”

The process of hiring a new executive doesn't end the moment the offer is accepted. Too often, nonprofit executives are left to fend for themselves when they begin their new roles, leading to an increase in failed hires. In fact, according to Fortune, approximately 40 percent of new executives, whether they were promoted or have changed employers, fail in the first 18 months. This number is alarming, but if the process of onboarding executives is taken seriously, these results can often be avoided.

For faith-based organizations, investing in an onboarding process is just as important as any other, perhaps even more so. Nonprofit organizations

with faith-based missions need leaders that fully understand the details that comprise their unique culture. Establishing and following a protocol allows new executives to truly become a part of the organization and ensure the fit is right. The Boston Consulting Group reports organizations with strong onboarding programs experience 2.5 times the revenue growth and 1.9 times the profit margins of organizations that do not.¹

There are nine primary elements a faith-based nonprofit organizations can implement in an onboarding program to increase longevity with new executives and make the transition as smooth as possible.

¹ <http://www.bcg.de/documents/file110599.pdf>



1. Prepare existing team members for the new executive's arrival.

No one likes to be blindsided, especially when it comes to a shift in leadership. Equipping other employees for the addition of a new leader is crucial to helping the executive join the organization successfully with minimal growing pains. Communicate the new leader's role and responsibilities clearly, capitalizing on the opportunity to provide a refresher for all employees. If possible, encourage and provide opportunities for introductory discussions with the executive's immediate superiors and/or subordinates, even prior to the official start date. Connect the executive with key clients and/or customers as well as any individuals internally with whom they will work closely. Assigning a peer to serve as an onboarding "coach" for the new leader for the first 6-12 months can be greatly beneficial, particularly with cultural and missional integration. Investing in these relationships early on will help the transition run smoothly.

“**No one likes to be blindsided, especially when it comes to a shift in leadership.**”



2. Immerse the new executive in organization culture.

George Bradt, executive onboarding expert at PrimeGenesis, notes that “culture is your only sustainable competitive advantage.”² It is the only characteristic of an organization that remains unaffected by outside factors and can therefore stand the test of time no matter what. The economy, sales, technology, and personnel all ebb and flow, but culture remains the core of a business, particularly for a faith-based organization. Culture encompasses mission and values, which reflect an organization’s identity and dedication to serving God, but it also includes social and professional norms within the organization, internal processes and tendencies, and more.

Holding workshops or retreats to familiarize all new employees, particularly executives, with organization culture is one way to immerse them these characteristics. Executives should be especially familiar in the concepts, as their leadership should reflect the core values of the organization and set an example for other employees. They should embody the mission and be able to communicate it effectively to others. All decisions they make should be filtered through that lens.

The culture of a faith-based organization is what sets it apart from other organizations in the same field. It encompasses the “why” behind what it does, and understanding the “why” is crucial to whole-hearted commitment.

² http://www.huffingtonpost.com/george-bradt/why-you-must-make-culture_b_8405886.html



3. Communicate clearly responsibilities in regards to mission integration.

Part of the new executive's role will likely be participating to some degree in the promotion and management of the organization's mission integration. The organization must ensure that the new leader understands what his or her role will be in these initiatives, such as: ministering to clients served, religious activities and services on campus, and community outreach. Understanding these responsibilities from day one will enable the new leader to manage time effectively and participate to the full degree that is expected, avoiding surprise or overloading later on.

“

...enable the new leader to manage time effectively and participate to the full degree...”



4. Set clear expectations and goals for the new executive.

One of the most common ways a new leader fails is by under-delivering, and in many cases this can be traced back to a lack of clarity regarding expectations from day one. To minimize the risk of under-performing, well-defined expectations must be set from the first moment of the job. The new executive must fully understand the ins and outs of the new role from a practical standpoint: what tasks he or she is specifically responsible for, who he or she reports to (if anyone), and any other details he or she would need in order to perform the job well. This also includes a thorough understanding

of all aspects of the product or service the organization provides. This complete knowledge allows an executive to thrive rather than simply survive.

Setting measurable goals, however small at first, for a new leader within the first few months not only allows an executive to understand exactly what is expected of him or her, but also builds confidence, as well as the team's confidence in the new executive. Achieving a goal as a team and celebrating it together early on in the new leader's tenure will build trust in his or her leadership and help re-unify the members under new guidance.

“This complete knowledge allows an executive to thrive rather than simply survive”



5. Familiarize with communication guidelines and messaging.

“
making them clear
to new executives
is **crucial to
maintaining
consistency.**”

The new leaders must also be familiar with how the organization’s mission and faith is communicated both externally and internally, whether it comes down to simply how members of the organization talk about these shared values to others or how the organization as a whole is positioned within the community. These messages should be the same across the board, and making them clear to new executives is crucial to maintaining consistency.



6. Allow the tenure of the new executive's predecessor to overlap if possible.

Having the previous holder of the new leader's position present during the transition will, in most cases, make the switch as seamless as possible. If done well in a relatively short period of time, it will enable the predecessor to act as a mentor and liaison for the new leader to introduce him or her to board members and other executives. The situation must be handled delicately, though, to avoid both executives seeming like "lame ducks" or causing tension, particularly if the predecessor is having difficulty passing the torch. Limiting the transition time to 30 days can be helpful in such situations to allow overlap without causing confusion.

“
it will enable the predecessor to act as a mentor and liaison for the new leader”



7. Familiarize new executives with stakeholders and decision-makers.

For a new leader to achieve a sense of belonging and confidence, he or she must be familiar with the “who’s who” of the organization. New executives must know whom to approach to talk about which organizational responsibilities and be comfortable in doing so. Knowing who the decision-makers are and having the opportunity to begin relationships with them helps integrate the new executive into the organization and allows them to take ownership over their role.

Tangentially, it also empowers the executive to avoid any faux pas over rankings or being unfamiliar with an important person.

These introductions can begin in the period between the hire and the executive’s actual start date to allow him or her to get a head start on becoming a part of the team. This will also help get the ball rolling on establishing relationships and take a few more things off the new leader’s plate during his or her first few days in the office.

“...having the opportunity to begin **relationships with them helps integrate** the new executive...”



**8. Overall,
be welcoming
to the
new leader
as well
as his or
her family,
especially
if they
relocated
for the job.**

It may sound trite, but doing small things for the new executive and his or her family can go a long way in making him or her feel welcome and want to stay a part of the organization for the long haul. Particularly for faith-based organizations, showing hospitality and excitement for the new leader's arrival can be a tangible way to show God's love to your employees, not just the ones your organization serves. Having other senior executives take the family out to dinner, providing tickets to a local game or show to enjoy the new city, or even inquiring about an executive's favorite treat and having a welcome basket on his or her desk on the first day are easy ways to make the executive feel a part of the team. First impressions often color an individual's characterization of an experience for the remainder of the time spent there, so it is important to make a strong effort from the moment a new executive signs on the dotted line.



9. Check in **periodically** with the executive throughout the first year.

Consistently assessing not only the executive's performance, but also his or her emotional and professional well-being, such as whether or not he or she feels a part of the organization or feels the role and expectations have been made clear, is crucial to maintaining quality leadership over time. It is not a once-and-done solution. Successfully bringing a leader in may require adjustments along the way. Being flexible and understanding will enable your organization to work with the new executive toward a mutually beneficial role.

Employing onboarding strategies for a month is helpful, but committing to the process over a long period of time is a more reliable strategy to foster longevity with new executives.

“
Successfully bringing a leader in may require adjustments along the way.”

Investing in executive onboarding can seem daunting or even impractical at times, but the amount of time and money spent on bringing in a new leader the right way is far less than the cost of losing one after only a year.



George Bradt also writes in his Forbes column about software organization Qlik, which took its entire team on a week-long strategy review retreat every year from 2000-2015. Bradt notes this is because when faced with questions of whether or not the organization could afford to do something so drastic, Qlik CEO Lars Bjork knew they wouldn't "be able to afford not to do it."³ Making the right decision to hire an executive takes time and effort, and integrating that executive into his or her new organization does as well. Do it right, though, and you'll build loyalty and a strong leadership team for your organization.

³ http://www.huffingtonpost.com/george-bradt/why-you-must-make-culture_b_8405886.html

ABOUT FAITHSEARCH PARTNERS:

FaithSearch Partners is the only executive search firm in the U.S. focusing exclusively on serving faith-based hospitals, healthcare organizations, churches, ministries and colleges/universities. Based in Houston with locations in Dallas, Denver, Los Angeles, Orlando, Nashville and Asheville, FaithSearch is able to serve faith-based clients in all regions. As we continually strive to remain the preeminent executive search firm for faith-based organizations, we work every day to fulfill an even greater purpose – one that extends beyond the details of our day-to-day and ventures into the larger stories of the people and organizations we serve. We are dedicated to providing lasting solutions and championing faith-driven leaders. FaithSearch exists to empower faith-based organizations with the right people at the right time to help drive their unique mission of ministry forward.

FaithSearchPartners.com