

What Should a New ED Focus On?

A member of the Bridgespan Nonprofit CEO/Executive Director Network asked community members, “If you’ve made a move from some other role and sector to the ED role, what do you wish you had focused on those first few weeks on the job?” The conversation that ensued, some of which is shared below, provides peer advice to other nonprofit executives transitioning into new roles.

Sherry, ED

What I focused on, and am glad that I did—compliance with regulatory requirements and board governance policies.

Marilyn, President

Three things I wish I had known or done when I made the move to nonprofits:

1. How to work with a board
2. The core elements necessary for a successful nonprofit
3. Organizational assessment BEFORE putting goals/objectives together

Janine, ED

1. Complete understanding of the current fiscal standing
2. Understanding the history and current functioning of the board of directors
3. Quick organizational assessment to see what is working, or not (Best done at this point with key players who can tell you what's what.)

Nothing is worse than hidden politics between the key stakeholders that can easily derail your efforts. A quick triage can at least get you on the map of where the nonprofit is, and give you some idea of where allies might be.

Bob, ED

I agree with Sherry and Marilyn that board management is paramount and should be discussed with the board chair early on. I'd also work with the board chair to develop three to five agreed upon measurable goals/objectives early on (first month) as a way to assess your performance. Make sure they align with the mission and highest priorities, and perhaps have a stretch goal element as well.

Karen, Managing Director

I am currently in my fourth week as the new ED of a small foundation. My first step has been to conduct a discovery (or assessment) interview with individual board members, past board members, volunteers, a few donors and staff—15 in all. This has enabled me to not only meet key people and establish relationships, but also learn about where there is alignment/lack of

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alignment, strengths, and areas for development in the organization. The data is being collated, interpreted, and reported out to the board at the next meeting. This data will serve to guide where I focus my time and energy – and help the board focus its resources.

Michelle, Founding Director

Ask board members what their expectations are of you and require that they meet with you regularly, even within that first month period, to go through everything from staff relations to financial position of the organization.

Hillary, Consultant

Before I took my ED job, the board had told me in the interview what its expectations was (goals, deliverables) for my first year, which I found very helpful. The only thing I can add is an additional detail on board relations: Ask one or more key board members how they see the board's role, in addition to yours.

Lissy, ED

I concur that the key ingredients to a successful transition are: 1) studying the finances and understanding, if fiscal management is an issue, where cuts can and should be made; 2) meeting with each board member individually to ascertain her/his reasons for joining the board, expectations, and hopes for a new ED, ways in which the organization might improve, and each board member's short- and long-term vision for the organization; 3) meeting with each staff member individually to assess that individual's level of satisfaction and professional growth desires, as well as the issues discussed with board members; and 4) hold regular staff meetings from the outset to build consensus and collegiality, and to show leadership by example.

Eileen, ED

I have been in my role for two years now and my best advice is to: 1) make sure you understand the nuances of the nonprofit world, rules, 990s, etc.; 2) Get to know your board members, figure out how to get along with them, and make the most of those connections; they will be the foundation that helps your organization to grow (they are there for a reason so get them to do their job); and 3) learn everyone's strengths and weaknesses, and once you have accessed that you can utilize your team to be a winner.

Andrej, President/CEO

Quickly connect with the key influencers and multipliers within your membership. They will be key in helping you understand the fundraising landscape of your industry. Many have stated it already, but the quality of your relationship with your board can not be overstated. Connect with each of them early and often.

Elizabeth, ED

I'd add to pick up a copy of *The Executive Director's Guide: The Guide for Successful Nonprofit Management*, which is published by Third Sector New England (www.tsne.org). It encompasses a lot of what was mentioned above and focuses on you as a leader.

Joan, ED

I was a new ED last November, but I moved up within the same organization, so I had inside knowledge. Focus was 1) restoring fiscal stability, 2) establishing relationship and building confidence with board members, and 3) board governance.

Jonna, ED

I met with all members of the board and staff individually, and asked them all what they each thought my priorities should be during my first few months. This gave me a lot of insight into the organization and also laid the groundwork building the relationships needed.