



PATHWAYS TO ACTION

LEADERSHIP ONBOARDING

SITUATION

Following a national search, a new CEO was appointed to lead a foundation, based on her knowledge of and experience in the organization's programmatic areas of interest. Brought in from another sector because of her significant accomplishments in a challenging issue area, the new CEO received high marks for her tenacity, creativity, and management ability. While excited about the new opportunity, the new CEO was also somewhat daunted by the challenge of running a different kind of organization than she had in the past.

ANALYSIS

The challenge the new CEO faced was not one of proscription, but rather a wealth of possibilities, thanks to the board's openness to new ideas and its confidence in her. The new CEO developed an outline of a plan that highlighted the key areas of near- and intermediate-term focus, but she was unclear about specific next steps, precisely because the management of this type of organization was so very new to her. From endowment management to building relationships with like-minded funders, the need for action quickly became apparent, but she realized that she needed help in identifying the best place to start, a clear sense of what steps needed to be taken, and a timeline that would not only be realistic, but would maintain the board's sense of confidence in her.

SOLUTION

The list of priorities we helped this CEO to develop provided specific next steps: a review of the organization's endowment management, a review of the positions within the organization (and the people in those roles), consideration of future board composition, and introductions to potential funding partners in the organization's programmatic work. In each of these areas, we helped the new CEO lay out a plan, but also were able to assist in the implementation of that plan. With execution on key priorities under way, the new CEO found herself on much stronger footing in her new position, and could then turn her attention to the grantmaking and convening aspects of her role, which aligned her reason for joining the organization in the first place with the board's enthusiasm for her vision of social change.