

New Executive Director 90-Day Entry Plan

After the orientation process has been completed for the new Executive Director (ED), the organization's board chair should ask the ED to prepare a 90 Day Plan to help guide the organization during this final phase of the transitions and to begin addressing the first year success benchmarks. The sample below provides an example of a 90 Day Plan.

1. RELATIONSHIP BUILDING

Staff

- Meet with each staff member (individually or by teams) within first two weeks to establish rapport, learn about each members' work and gain staff insights on the strengths and challenges facing the organization; and
- Establish a process for meeting regularly with the senior leadership team.

Board Members

- Hold face-to-face or phone conversations with each member of the board within first 30 days to understand their respective histories, roles and vision for the organization's future;
- Initiate conversations about expectations for the first 12 to 18 months of my tenure as the new ED, within the first 60 days;
- Set up regular check-in meetings with the Board Chair; and
- Review working agreements related to joint planning, communication, decision-making roles between the ED and the Board of Directors.

Donors and Funders

- Develop talking points with the help of the Development staff and plan joint visits with former ED or board member to be introduced to major donors (i.e., "the hand-off");
- Complete joint visits to major donors within the first three months;
- Craft message to all donors/supporters for dissemination through online media;
- Initiate individual conversations with at least three major donors per week to continue to build rapport; and
- Reach out to thank all foundation officers for their support via phone or in-person.

Major Stakeholders (collaboration partners, etc.)

- Set up meetings with key allies and strategic partners to establish rapport, secure a current picture and establish agreements for continued work together; and
- Set up meetings with selected leaders and policy makers in the field or sector.

2. MANAGEMENT AND OPERATIONS

Programs

- Review organizational chart, program descriptions, evaluation data, board by-laws, strategic plan and/or annual operating plan;
- Receive briefings from key staff regarding all programs, campaigns and future commitments; and
- Review key grant agreements within one month.

Financial Management

- Review financial management protocols;
- Review current financial statements (profit and loss, balance sheet, and cash flow projections) within 3 weeks. Review at least monthly thereafter;
- Ensure signatories on all accounts are up to date; and
- Meet with Executive Committee or Board Treasurer to discuss financial monitoring and reporting processes.

Fundraising (see also *Donors and Funders Section* above)

- Review development plan and fundraising projections with development staff; and
- Identify first year fundraising priorities and cultivation strategies with the support of development staff and board members.

Strategic Communications

- Work with staff and advisors to develop a communications strategy that strategically positions the organization and continues to build the public's confidence.

Support for Board of Directors

- Establish a practice of checking in with all board members at least once per quarter;
- Return all messages and phone calls from board members within 48 hours;
- Consult with the executive committee on the agenda for board meetings; and
- Distribute a monthly update to the board.

3. LEADERSHIP GOALS

- Research and participate in executive leadership and/or management trainings;
- Identify and hire an executive leadership coach; and
- Participate in an executive peer support program.