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# CEO Recruitment Guide

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## Onboarding the new CEO: The Board's Role

Having hired the right CEO for the library, it is now time for the board to assume responsibility for onboarding and orienting the successful candidate to their new workplace and CEO responsibilities. Onboarding is a comprehensive process of ensuring that a new employee - in this case, the CEO - acquires the necessary knowledge, values, connections, skills and abilities to be successful in their role. It is a process of supporting the CEO throughout their learning curve, especially in the early days, and ensuring that the CEO knows they can count on the board's support going forward. This commitment to support the CEO, individually and collectively, is an important board obligation that too often gets overlooked. In a survey of 214 nonprofit CEOs, conducted by Bridgespan Group, nearly half of the respondents reported getting little or no help from their boards when first taking on the position. Many would argue this is setting up the CEO for failure. In the area of personal introductions to key people, in particular, board members can do a lot to smooth the way and help ensure early and ongoing success.

Onboarding and supporting the CEO is laying the groundwork for a successful future - for the CEO, for the library, and for the community. In the Bridgespan Group's white paper, *The Nonprofit Board's Role in Onboarding and Supporting a New CEO*, the authors provide a Sample Orientation Plan, which includes meetings and activities under the following headings:

- Communicating the transition
- Key meetings to attend
- Learning the organization
- Building relationships

The Bridgespan article also discusses why onboarding is so important and makes some recommendations for routines and practices that should be established as part of the onboarding process. Another helpful article that appeared in the December 2016 issue of *Harvard Business Review*, entitled "After the Handshake," puts onboarding in the larger context of leadership transition, and highlights the transitioning work around a change in leadership as a shared responsibility between the outgoing and incoming CEO and the board. It includes this very succinct piece of advice for boards:

**"Clear expectations are among the most crucial things directors [trustees] can provide."**

Here are a few additional short articles that discuss onboarding, orienting and supporting the CEO as important board obligations:

- 5 tips for onboarding a new CEO  
The Nonprofit Times
- The Right Way to Bring New CEO on Board  
Spokes for Nonprofits
- Do Boards Do Enough to Support New CEOs?  
Mark Athitakis, Associations Now



## Performance Management for the New CEO

After the intense work and excitement of recruiting and hiring, library boards have a tendency to leave the planning of performance review until a later date. An initial performance review a few months in is a best practice. Yet, this performance review can only be conducted if agreed-upon performance expectations have been established from the date of hire.

It is not possible, over a short period of time, to evaluate a CEO's performance against all of their responsibilities and all that needs to be accomplished. It is crucial, therefore, to set specific target goals with the new CEO that relate to key initiatives identified in the Position Profile for the first performance review. Measurable targets are most helpful. For example, "Get one local paper or radio station to feature the library at least once a month" is far easier to measure than "build partnerships with local media."

In terms of managing the performance review process of the library's new CEO, there are a few points for the library board to consider:

Who should be involved:

- A small library board committee should lead this process, perhaps the board chair, the hiring committee or HR committee chair, and a board member of the CEO's choice. It should not be the board chair alone or a municipal staff member.
- In the review, consider consulting other stakeholders beyond board members. If you decide to broaden the review, you might want to make sure it really is a "360 degree" review. For instance, if you are going to ask for staff input, also ask for user, peer, and community input.

Be clear on the CEO's role vs. that of the board: the CEO's performance plan and subsequent assessment should be related to operational and management issues, while of course the board focuses on governance, policy, and future directions. It is best practice that the process of a CEO performance review be guided by board policy.

The policy should outline:

- How often both planning and assessment will take place
- When the performance review will occur
- Size and composition of the committee
- Who will contribute to the process
- How the results will be shared with the entire board; how the board will speak with one voice and retain confidentiality
- Steps in the process with timelines
- Guidelines for determining which objectives and plans will be measured
- Guidelines for choosing evaluation instruments - when to use rating forms, incident reports, statistical summaries, etc.
- Procedures to be followed if performance expectations are not met (however, waiting for this review is not what to do in cases of significant performance problems)
- Appeal procedure if the CEO is not satisfied with the assessment (normally this goes to the full board)
- Confidentiality requirements and procedures for document storage (beyond a box passed from one board chair to another)

The CEO performance review is an essential aspect of good governance. Performance management discussions are always confidential, and held in camera, and should be

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unhurried and uninterrupted. Performance management is important for:

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- Board's accountability and due diligence
- Feedback to the CEO
- Maintaining good communications between the board and CEO
- Providing a good example and rationale for the CEO to engage in a similar exercise with staff
- In some cases, the CEO's compensation may be tied to performance rating

Key components of the process include:

- Valuing fundamental principles, including collaboration, confidentiality, and objectivity
- Board committee and CEO working together
- Emphasis on planning and review, not just review
- Reasonable and measurable goals
- Concentrating on things that must be accomplished, rather than on nice-to-haves
- Considering the difference between personal development and organizational needs

Be clear to distinguish between objectives (e.g. develop and implement a succession plan) and competencies (e.g. excellent networking and public relations skills). Success at reaching objectives is what needs to be assessed. Discussing competencies only becomes an issue if an objective has not been reached due to a lack of particular competencies which need to be developed as part of the performance plan for the next period.

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