

## Leadership Practices to Orient and Support the New Leader

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Being prepared for the arrival of the new leader sets the stage for developing a mutual relationship based on trust, and for supporting the leader's efforts to be successful in moving the organization forward. Your preparation will send an important message about your leadership and credibility, and about the current status of the organization. Below are highlights of critical actions that should occur within the first three months. There will be some overlap in the timeframes as some activities are ongoing.

### **First Day**

**Introductions** -- Walk the new leader through the facility and introduce them to as many staff as possible. If this is a large geographic area, plan to do this over a period of several days. It is important for the incumbent to have a sense of the people and their work settings.

**One-on-one** -- Hold a one on one meeting with the new leader. Tell them about yourself and the work you have done. Let them know that you are there to support them. Share all the ways that your previous bosses utilized your talents. Let them know you are flexible and can support them in a variety of different ways. Reinforce your understanding about the importance of confidentiality regarding information that you will share with one another. Propose daily one-on-one meetings for the first several months while they are learning about the work of the organization. Provide a brief overview of how the organization conducts its business, e.g. weekly management team meetings, monthly division meetings; and the major work functions for which briefings have been prepared, e.g. personnel, budget, legislation, strategic plan, performance measures and grant awards. Finally, describe how you envision their orientation taking place over the next three months based on the planning that has been done prior to their arrival. Flexibility is crucial. Let them know that the plans can be adapted to meet their learning needs and priorities.

### **First Week**

**Official welcome** -- Hold a reception to provide staff the opportunity to meet the new leader in an informal setting.

**Orientation plan** -- Review the orientation plan that has been developed and address any questions or concerns. Ensure that the briefings include appropriate staff.

**Daily one-on-one** -- Reach agreement on a time to meet, preferably first thing in the morning, recognizing that some meetings will have to be rescheduled. Having a set time will help ensure that the meetings take place. These meetings will provide a context for reinforcing all of the information the new leader is learning about the organization. Review the calendar. Provide any necessary context for the meetings that are scheduled. Talk about pending products that need attention (e.g. correspondence that needs to be signed, personnel actions or press releases that need to be approved) and how each relates to the work of the organization.

**Ethics** -- Many organizations provide official training by ethics officers when staff first arrives. You can play an important role in helping to ensure that the new leader understands the rules and avoids ethics or conduct problems. Make sure the new leader is aware of those areas where they are most likely to make mistakes and explore ways to avoid them.

**Priorities** -- Advise the new leader that people will expect to hear their vision and priorities in the near future. Suggest they think about what they would like to accomplish during their tenure; what they would like remembered as their legacy. Propose that they pick no more than four priorities. Without focus, their

priorities will be overtaken by the routine work of the organization with the possibility that at the end of their tenure they will not have been successful in achieving their major goals.

**Organizational culture** -- Help the new leader understand the culture and norms of the organization, e.g. meetings start on time to show respect for the participants, and we believe that leadership occurs at all levels of the organization so it is important to recognize and reinforce staff contributions.

**Surprises** -- It is critically important to avoid surprises. Alert the new leader to any event that has the potential to become a crisis within the first few months and explore actions they might take to prevent it from becoming a crisis.

### **First Three Months**

**Orientation briefings** -- It is important that the new leader not be overwhelmed with these briefings. Prioritize topics and information. For example, the first briefing on each of the organization's programs should include a broad overview of the program, relevant history, current status and any "hot topics". Briefing papers should be no more than 2 pages. More in depth information about targeted aspects of the programs, e.g. impact of new regulations, can be provided at the appropriate time during subsequent briefings. Have present at the briefings appropriate staff that can answer any questions that might arise. Spend time helping the leader become comfortable with the experts in specific fields. This will help them to get help when needed from a familiar face.

**Key introductions** -- Identify key stakeholders. The new leader needs to know the major players, within and outside of the organization, whose support they will need. Schedule "meet and greets" with key Administration and Congressional staff that provide oversight for the organization's programs and budget, as well as, key stakeholders in the field. Make sure the leader is appropriately briefed about the players and their interests and issues prior to each meeting.

**Two-way communication** -- Routinely ask the new leader for feedback about how things are going, what they need, and things they would like to see done differently. Be responsive to the feedback.

**Build trust** -- Your relationship with the new leader will develop over time. Providing a successful orientation and being responsive to their needs during these first three months will demonstrate they can count on you to provide the support they need and to follow through on your commitments. Treating information they share with you confidentially will show them that you are a trusted partner.