

Preparing for the Arrival of a New Leader

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Build trust and credibility with the new leader

Contact the new leader to introduce yourself, to say congratulations and that you are looking forward to working with them. Share that it is your job to help them be successful and that you will begin preparing for their arrival. Brief them on what you will do to orient them, and tell them that you are anxious to learn what their priorities will be and to work with the organization to help implement them. Check for immediate needs or expectations they may have. Advise them that they will want to be prepared to make a timely announcement about their priorities and values. Offer to send speeches or other public documents that summarize the vision of the senior leader in the organization. This will help them to think about their priorities and how they will align with that vision. Be selective when considering which documents to send to avoid information overload, and be sure to send only public information since they are not yet an employee of the agency. Tell them to feel free to contact you if there is anything you can do to assist prior to their arrival. View this contact as the first step in establishing a positive working relationship with the new leader.

Prepare for orientation

Preparing the orientation includes developing one or two page briefing papers tailored to the new leader's particular background and expertise. Keep in mind that leaders come to organizations with diverse backgrounds and experiences. Successful transitions begin with assessing what information the new leader will need to know about the organization and its resources based on his or her particular work experience and expertise. Use the internet and social networks to learn as much as possible about them. It is important to avoid information overload. Be strategic in determining topics for briefing papers with a focus on those high leverage areas that would be most helpful for the new leader.

Orientation materials should be completed by the time the new boss arrives. Set clear expectations for staff members who prepare briefing papers. Save time and maximize resources by providing a template and an example of a high quality paper to ensure that the papers are concise, covering only the information the new leader needs to know when they arrive, and written in plain English. Consider developing the materials as on-line tutorials so the new leader can access them at any time. This also facilitates preparation of briefing materials for the next new leader as many of the on-line materials could be easily updated and revised.

Topics for briefing papers might include:

- Brief overview of the organization, its programs, the office administrators, including the history of the programs and key issues, as well as, how their new office/organization fits within the larger organization and how it works with other offices;
- Description of current culture of the organization, how work gets done and what is valued;
- Immediate near term issues (any land mines or hot issues requiring immediate attention);
- Timelines and calendars for strategic planning, updating and revising performance objectives, and developing the program budget and funding priorities, multi-year projects that have high investment value and need further stewardship to complete;
- Workforce issues including budget for salaries and expenses, vacancy's and other ongoing actions or initiatives involving employees; Share the list of employee experts in each of the major career fields if you maintain such a list;
- Information about Congressional Committees and legislators which have responsibility for the office's programs and budgets, including the particular interests of the Members.

Thoughtful planning and follow through in executing a successful orientation will instill in the new leader confidence in you and the organization, and provide the foundation for developing relationships based on trust.