



## Strategic Onboarding Delivers Engagement, Retention, Results

*All we need to do is to find the right candidate.*

This is a common refrain I hear from our nonprofit clients. Unfortunately, they're wrong.

Finding the right person for your leadership and advancement roles is, yes, key to achieving your mission and goals. But once you find the right candidate, you're only half of the way to achieving the results you want. The other half requires successful onboarding.

If your organization doesn't have a strategic onboarding process, you could lose your dream candidate within a year and not achieve the results you expect. From my perspective as a long-time executive recruiter for the non-profit sector, onboarding is too often unappreciated and ignored as an essential part of recruiting and retention. In order to not only attract the right people but also engage them and enable them to succeed, you need to develop a formal onboarding program.

Why is onboarding so important for non-profits?

Onboarding is a process extending from prior to an individual's hiring to about one year after they start a new position with an organization. This process introduces an individual to the organization's culture, provides the tools and initiates the relationships to successfully assimilate into the position, aligns expectations and performance and ramps up productivity. A number of recent research studies reinforce the need for strategic onboarding.

**Reduce high turnover:** The 2013 report *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising* summarizes the results of a survey of more than 2,700 non-profit executive directors and development directors across the US. The study reveals that among the factors impeding growth in their organizations are instability in the development director position, particularly high turnover and long vacancies. Among those surveyed, for example, median vacancy for the development director position was six months, with 46% reporting longer vacancies. For organizations with revenues of \$1 million or less, the median vacancy was one year.

Onboarding is a significant factor for any newly hired employee. Without an appropriate process in place, new hires can feel they aren't achieving and aren't appreciated. Many quickly start looking for a new job – typically within the first year. Effective onboarding, however, can significantly reduce turnover.

**Increase retention, reduce the costs of repeat hirings :** High turnover is also highly expensive. According to the Conference Board of Canada in its *Compensation Planning Outlook*:

- executive-level positions can take 15 weeks to fill and cost \$43,000;
- management and professional positions can take nine weeks to fill and cost \$17,000; and
- employees may need six to 12 to 18 months to become fully productive in a new role.

A 2008 study, *Getting On Board: A Model for Integrating and Engaging New Employees*, found that onboarding employees during their first year of employment increased retention rates by



25%. Thus a comprehensive program can strengthen employee retention and reduce the need for repeat hirings.

**Tough competition for talented people:** According to a 2012 survey of more than 200 CEOs and senior human resource professionals from around the world by Right Management, nearly two out of three employers say that other organizations try to hire away their leaders.

As competitive pressures continue to grow, your non-profit must be able to keep your key people in order to provide stability for your organization and achieve your goals. Onboarding can help you do this.

### Onboarding best practices

While the specific components of an onboarding process will vary according to the needs and characteristics of each non-profit, here are a number of best practices to consider when developing your program.

### Prior to and during recruiting

- Know the role you want your executive or fundraiser to serve and define what success looks like for this position. For example, what outcomes (such as build the volunteer leadership team or launch a capital campaign) do you want the individual in this role to achieve? In what timeframes (e.g. three months, six months, one year) do you want these milestones achieved? During candidate interviews, communicate this vision of success for the position.

It's important to be realistic about expectations for a leadership or advancement position; many board and management teams expect new hires to "hit the ground running." This is intimidating, however, rather than empowering. Transitioning into an organization is a process that can take up to 18 months for an individual to achieve full integration and top productivity.

Remember that during candidate interviews, you are selling your organization. Yes, it's important to share your vision and strategic goals but it's equally important to share your organization's culture. Culture can have a major impact on the success of newly hired employees because they must support or adapt to an organization's unique culture in order to be effective. Before interviewing candidates, take some time to identify the particular beliefs, behaviors and practices that make your organization special. Once you have defined your culture, candidates can visualize whether they would fit into your organization and be effective.

- Project the career path for someone in this role and the individual's future potential with your organization. The hiring manager or executive recruiter can use this information to prepare a clear job description, expectations and goals for the position as well as an outline of a potential career path that can help to attract quality candidates.
- After the formal interview, consider inviting promising candidates for coffee or lunch. In an informal setting candidates tend to be more relaxed, making it easier to observe their personality and to have an in-depth conversation. For example one of our clients, an

Executive Director of a small social services agency, was hiring a Director of Development. Before making an offer, he took his preferred candidate to lunch. They discussed everything from their expectations to management styles, board expectations and even conflict resolution processes. By the time the lunch was over, both parties knew they could work well together. The candidate, who subsequently accepted an offer from the agency, later told me the conversation over lunch convinced him this was the right decision. He appreciated the ED's time and effort in getting to know him and discussing the issues that were important to him.

### **Before a new hire starts**

Once the successful candidate has accepted your offer, it's important to communicate the message: "you matter to us. We want you to be comfortable with us. We want you to succeed." Continue building the relationship by inviting the individual to coffee or lunch, answering questions and encouraging them to participate in their own onboarding by asking what they need to help them succeed in their new role.

- Provide information and documents to familiarize the new hire with your organization's goals and processes. These might include the strategic plan, program information, budgets, board manual, job descriptions, schedule of events, etc.
- Schedule meetings for this individual with key staff and stakeholders.
- Match the new hire with a mentor in your organization – an experienced colleague who can provide insight and guidance regarding leadership, skills and career development. This is especially important for executives and managers transitioning to the non-profit sector from a for-profit environment. If there is no one appropriate within your organization, provide the new employee with access to a professional association that offers opportunities to connect with external mentors.

### **The first day**

- Ensure that everyone in the organization understands that it's part of their job to make the new person feel welcome and to help them succeed in their role. Provide a tour guide to introduce the newcomer to people throughout the office.
- Identify all of the requirements necessary for the new person to be effective in the role, such as policies, procedures and systems orientation; technology training; passwords. Make all of this available to the individual on the first day, along with introductions to the people who can assist with these.
- Establish a system for accountability, feedback and communication by providing the new person with a draft one-month work plan. Schedule a formal check-in at the end of the first month.

### **The first year**

- Follow up with a robust performance review process. Reviews help high-performing employees stay engaged and connected by giving them a picture of a future path and a



map to get there. Performance reviews also provide feedback about contributions and suggestions for potential changes. Track the progress of the new hire and measure success after 30 days, six months and 12 months.

#### Make Onboarding a Priority for more Engaged, Satisfied, Successful New Hires

Make onboarding a priority for your non-profit by asking the Human Resources department to assume this responsibility, with input from management. Or, in the absence of an HR group, the CEO/president and senior team should assume responsibility. Use the following questions to help shape an effective process.

1. What challenges are we having with our recruiting and retention? How can onboarding help us resolve these challenges?
2. What are our objectives for our onboarding program?
3. Who should be involved in the onboarding process (i.e. executive team, HR department, supervisor, co-workers) and how should they be involved?
4. What needs to happen and when to ensure that new hires feel welcome to our organization and comfortable in our work environment?
5. How should we set goals for the new hire?
6. What will be the duration of onboarding?
7. How will we measure success?

Developing an effective onboarding program doesn't need to be difficult or time-consuming – it just requires a commitment to making the process a priority. Keep in mind that ultimately, onboarding makes it easier for employees to enjoy their jobs, perform well and contribute to the success of your organization.

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