

The First 90 Days – Guide for New Leaders

Minnesota Council of Nonprofits Leadership Conference

June 13, 2019

Speaker Introductions

- **Kris Kewitsch**, Executive Director – Charities Review Council
(kris@smartgivers.org)
- **Ritesh Patel**, MD PhD, CEO & CMO – Open Cities Health Center
(ritesh.patel@opencitieshealth.org)



Who is in the room?

How long have you been in your current role?



The First 90-Days

Written by Michael Watkins

The 10 Principles to Excel in the First 90 Days



1. Prepare Yourself

What will make you successful in this role is likely different from your last role.



2. Become a Student

Learning and listening should be your primary focus in the first 30 days.



3. Match your Strategy to the Situation

Diagnose the situation before building your plan.



4. Secure Early Wins

How will you create business value and improve business results in the first 90 days?



5. Negotiate Success

Gain consensus on your 90-day plan (and beyond) with your manager.



6. Achieve Alignment

Assess whether your team's strategy is sound and if you have the skills and resources needed to deliver on it.



7. Build Your Team

Evaluate, align, mobilize, and restructure as necessary.



8. Create Coalitions

Build support for your initiatives while learning the politics and culture of your organization.



9. Keep Your Balance

The right advice and counsel network is essential.



10. Accelerate Everyone

Everyone around you is also in transition. Help them by supporting them during the transition.

Prepare Yourself

- Transitioning Successfully
- Assessing vulnerabilities
- Laying the groundwork for success

Become a Student

- Questions About the Past
- Questions About the Present
- Questions About the Future
- Sources of Knowledge
- Learning About the Culture

Match Your Strategy to the Situation

- Identify Challenges and Opportunities
- Focusing Your Energy

Secure Early Wins



- Avoid Common Traps
- Making Waves
- Create a Compelling Vision
- Establishing Long-Term Goals

Negotiate Success

- Build Productive Working Relationships
- Define Expectations
- Agree on Diagnosis of Current State
- Put Together your 90-day Plan

GROUP EXERCISE

10 Minutes

- Break into groups of 2-3 people
- Share how long you've been at your organization
- What have you learned about the culture of your organization?
- What would you tell someone new about your organization's culture?

Achieve Alignment

- Strategy
- Structure
- Systems
- Skills
- Culture



Accountability Standards

- Public Disclosure
- Governance
- Finance
- Fundraising



Executive Director & the Accountability Standards

Governing Document Review

PHILOSOPHY

The governing documents of a nonprofit formalize many of the policies, procedures, and structures that demonstrate effective governance. By regularly reviewing the organization's governing documents, a board assures relevance and alignment with current practices.

STANDARD

Every three years, the Board of Directors will review the nonprofit's bylaws and organizational policies.

Separation of Roles

PHILOSOPHY

The ability of a board and its officers to act independently is compromised when key officer positions are simultaneously held by the same person and/or there is too great a presence of paid staff on the board.

STANDARD

It is important that a board of directors is free of real or perceived conflicts of interest. For that reason,

- Only one paid staff member will serve on the board at any given time,
- Paid staff members will not serve as the board chair, and
- No board member will simultaneously serve as both the board chair and board treasurer.

Build Your Team

- Inheriting a Team and Changing It
- Determining the Seats on the Bus & Who Sits in Which Seat
- Aligning Restructuring with Architectural Changes

Create Coalitions

- Identify Needed Supporters
- Map Networks
- Meet & Greet Plan
- Memberships



Keep Your Balance

- Adopt Success Strategies
- Enforcing Personal Disciplines
- Building Your Support Systems



Accelerate Everyone



- Accelerate Team Development
- Develop High-Potential Leaders
- Integrate Acquisitions
- Strengthen Succession Planning

Set 30-, 60, 90- day Priorities

Charities Review Council Executive Director 30/60/90 Day Plan

July 22, 2012

Listening & Learning Tour

- Leverage Meet & Greet schedule (M&G)
 - Created in partnership with Staff and EC with line of sight to the BOD
 - Ensure staff and BOD are included in meetings where appropriate
- Develop key objectives for each category within M&G

Vision & Strategic Development

- Begin visioning for 2016
 - Capture heart and mind of constituents
 - What's next for CRC
 - What do we want to be saying and have people say about us
- Explore new business opportunities as informed by Listening & Learning Tour
- Creatively address and evaluate partnership opportunities

Board of Director Involvement

- Ensure planning and execution of Strategic Planning & Board Retreat for October 11 Meeting

Ideation

- Observations
- Programming
- Communications



Q & A



Additional Resources

- “The First 90 Days” - Michael Watkins
- “Good to Great” – Jim Collins
- “Good to Great and the Social Sector” – Jim Collins
- Accountability Standards – www.smartgivers.org
- “Start with Why” – Simon Sinek