

## Setting a Plan of Action for your first year on the job as a CEO

By Gary Bernstein

You've just been hired to direct and lead a new organization. You interviewed well and have succeeded in landing your dream job, now what? The following seventeen principles will help successfully guide you through your first year on the job.

- **Establish a vision for your organization.** Set a direction and road map for your agency. Your organization should aim for excellence in everything it does in order to fulfill its mission and successfully attract members, customers and donors. Set high standards for you and your agency. Raise the bar to the highest level. Position your agency as the undisputed leader in providing outstanding service to your membership, consumers and to the community at large.
- **Position yourself as a leader in the community.** Be involved and active in the community. Participate and attend community and charity events. Show support for your colleagues. Be active and join your local Rotary club or local service organization. Be visible and join the right professional organizations and boards.
- **Who should you be meeting with?** Develop meaningful roles for influential individuals who you want to be associated with your organization. Meet with the power people. Meet and visit with past chief volunteer officers of the organization in order to receive input, begin the process of reconnecting them if needed to the agency. Utilize their vast experiences and knowledge of the agency, its people and the community.
- **Develop relationships with community businesses.** Partnering with local businesses and possibly implement cross-marketing techniques will truly benefit both entities. Reach out and develop relationships with area businesses and corporations for the purpose of generating potential new revenue sources. Develop win-win situations with the local merchants. Determine how your agency can help them increase their profitability and to find ways to increase foot traffic into their stores.
- **Develop meaningful relationships with your Board Leadership.** Leaders are individuals who are willing to devote time to your agency. They are people who will do what they say they will do. Help transform people from mere purchasers of service into committed clients/members. Work towards placing your volunteer leaders on Community Boards, such as the United Way, Jewish Federation, etc.
- **Develop positive relationships with staff.** Recruit and identify a terrific and dynamic staff. Foster a sense of "ownership" in your agency with your staff.
- **Develop a plan to equip your staff with the tools and resources to be successful.** Review all job descriptions including staff performance evaluations and organizational structure. Recruit, train, and retain the best and brightest professionals, while developing salary guidelines that are competitive.
- **Develop collegial relationships with other nonprofit administrators and executives.** Explore ways to develop cooperative and collaborative efforts with other agencies in the community. There are many advantages to collaboration. In today's day and age of limited resources, cooperative efforts with other local agencies make sense. You are then able to bring in a larger number of participants, share and

develop resources, provide better services to the community, generate more publicity and wider public awareness, and carry out activities and events which individual groups could not manage on their own.

- **Meet with your donors.** The chief executive plays a key role here. Cultivate and develop a long lasting and positive relationship with your current and prospective donors. Lay the groundwork for future solicitations. Make donors feel connected with your agency. Consider implementing a development audit, which will help you assess the agency's strengths and weaknesses as they pertain to the agency's potential to generate new revenue sources.
- **Know thy budget.** Be fiscally sharp. With the assistance of your finance director and an independent auditing *firm*, perform a detailed internal financial controls audit. Does your organization have a "reserve" account for necessary repairs and replacements of furnishings and equipment? As a new CEO, there is a good chance you may be hiring new staff. Provisions should be made in your operating budget for the cost of interviewing as well as for relocation costs of new staff to your community.
- **Strategic Planning.** Endowment development, annual campaigns, membership recruitment, capital campaigns. Develop a plan to grow your endowments. Identify donors who will champion particular programs and services.
- **Understand marketing strategies.** What is the image of the agency? Consider hosting a series of Town Hall meetings with a variety of user groups for the purpose of gathering information on programs, needs, communication issues, etc. Focus on an ongoing concentrated effort to attractively market and sell your programs and services. Use influential members of your organization to help tell your agency's stories and successes.
- **Program Planning.** Identify the trends. Along with key volunteers and staff, develop and implement a program committee to review and analyze all programs and services. Perform a survey to determine what your members/clients want in the way of programming. Offer programs and activities that are fresh and current. Give your consumers what they want, not what you think they want. Develop programs that are consistent with the agency's mission. Implement programs that are fiscally viable.
- **Leadership training for Board and committees.** Develop and implement a leadership development program for the purpose of identifying and recruiting future volunteer leadership. Recruiting good committee members is a lot like developing your farm system. Once committee members show their "stuff", a board nomination will quickly follow. Respect the amount of time volunteers spend attending meetings. If you properly plan your agendas and operate your meetings in a respectful and businesslike fashion, you'll be surprised at the amount of people who will want to volunteer for your organization.
- **Facility Management.** Perform a comprehensive facility audit. Create an immediate and pleasing visual impact upon entering your facility or office area. Immediately remove any clutter in the lobby, front office and hallways. Freshen up the facility, use plants and attractive and consistent signage throughout your facility. Analyze the current structure of the maintenance and housekeeping departments. Weigh the benefits of outsourcing cleaning services. Do you have the proper amounts of coverage of liability, umbrella and property insurance?
- **Watch out for pitfalls, worst nightmares, and roadblocks along the way.** What do you do when you arrive one day to work and find the local TV station on your doorstep? Develop strategies to handle emergencies. Consider the development of a safety and security committee. Determine who will serve as

the spokesperson for your agency to the media. How will you handle a medical emergency? Be professionally prepared for the unexpected.

- **Review all technology.** Are you up-to-date with computer software and hardware, phone systems, and Internet access? Do you have the needed equipment for media demonstrations? Since we live and work in such an advanced world of technology today, surround yourself with an expert who can immediately evaluate your technological needs.

The benefits of adhering to the principles and first year plan stated above are many and splendid. In addition to the satisfaction of accomplishing your stated objectives, you will see:

- A more energetic and effective leadership.
- A heightened appreciation among your donors, colleagues, and consumers.
- A new appreciation for your agency.
- Better connections in the business community.
- Higher levels of productivity and staff morale.
- Higher participation levels in fresh and new program offerings.
- A reliable operating budget with improved cash flow.
- An improved ability to communicate your message.
- An effective plan in place to carry you forward into the future.

You have now built a strong foundation to move ahead into your second year with confidence and security. Good luck!

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