

Study Session: Executive Director Onboarding

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Purpose of today's presentation

1. Understand the importance of onboarding
2. Clarify Commission's role in Onboarding of new ED
3. Determine what external support the Commission needs for onboarding and first-year review of the new ED
4. Approval of Commission Onboarding plan



Understanding the importance of onboarding

Why do onboarding for executive roles?

Evidence-based practice to:

- Clarify expectations, goals, and priorities
- Accelerate time to productivity
- Support leader in building key relationships, credibility and trust during critical first 90 days
- Improve leader's job satisfaction, engagement, retention, and long-term success in role
- Demonstrate consideration and respect



Potential challenges for new ED

- Presumed familiarity bias
- Performance assumption fallacies/ unrealistic immediate expectations
- Role boundary redefinitions
- Multiple commissioners and stakeholders → diverse and potentially competing expectations



Clarifying Commission's role in onboarding new ED

Key roles in onboarding

Commission

- Clarify expectations and performance goals
- Monitor and evaluate performance
- Facilitate relationship-building
- Decisions regarding executive coaching and performance evaluation process

Staff

- Plan onboarding activities
- Provide briefings and background materials
- Facilitate relationship-building
- Assist in navigating culture and processes



Proposed Commission touchpoints in onboarding

- Onboarding meetings with President and VP after agenda-setting
- 1:1 meeting with each Commissioner
- Monthly closed sessions for first three months
 - Clarify expectations and first-year goals
 - Informal performance evaluation
- Quarterly “dashboard” updates from Eric to Commission
- 6-month review (closed session)
- Annual Performance Evaluation (closed session)



Determining what external support the Commission needs

Executive coaching

Coaching is:

- Support in refining strategic thinking and navigating leadership transition
- External perspective
- Focused on action planning toward client's goals

Coaching is NOT:

- Mentoring
- Counseling
- Consulting or advising



External feedback options

Executive Coach:

- Provide progress updates while maintaining confidentiality in coaching relationship
- May solicit information from direct reports and others to support coaching
- Unlikely to provide direct feedback on performance

External Facilitator:

- Can solicit information from direct reports and others related to job performance
- Can deliver performance feedback but may lack organizational context



Commission support options

- **Option 1 (Staff Recommendation)**
Hire Executive Coach
- **Option 2**
Contract with Raftelis for six-month evaluation
- **Option 3**
Contract with another third party to facilitate six-month evaluation



Commission decision points

- Do you have suggested changes to the Commission Onboarding Plan?
- Do you wish to have monthly closed sessions with Eric?
- How will you conduct the 3-month “informal” evaluation?
- How will you conduct the 6-month “formal” evaluation?

