NANA

GUIDE · AUGUST 2025



THE NEW EXECUTIVE'S FIRST YEAR

A month-by-month guide to a new association executive's first year, from NANA's CEO and its board chair.

Walter Abernathy
Gordon Ashcombe

CAREER DEVELOPMENT

ABOUT THIS GUIDE

This guide is for anyone who has just been named, or is about to be named, the chief executive of an association. It follows the first year in order, month by month, and says what to do, what to leave alone and what your board is likely to notice. We are Walter Abernathy, CEO of NANA, and Gordon Ashcombe, CEO of the Society of Rural Hospital Administrators and chair of NANA's board. Every section is meant to be used at a desk, the week before you need it.

HOW TO USE THIS GUIDE

Read the first section on your first weekend. Then read one section a month, a few days before that month begins. Each numbered section opens with what you will be able to do by its end and closes with a checklist, a table or a worked example. The appendix holds three one-page records you can copy into your own files. If you started months ago, begin with the section for the month you are in, then read backward, because the earlier sections explain why the current one looks the way it does.

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Guide · August 2025. Published by NANA. Cover photograph: generated for this guide.

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1

WHY A CEO AND A BOARD CHAIR WROTE THIS TOGETHER

By the end of this section you will know who wrote the guide, what it draws on and how the year is divided. You will also have the whole year on one page, so you can see where you are before you read the detail.

One of us has run NANA since 2017, after a decade running a regional trade association. The other runs the Society of Rural Hospital Administrators, in Columbus, with 1,450 members and 19 staff, and has chaired NANA's board since 2024. That puts us on both sides of the table: one of us is eight years into an executive chair, and the other is the chair that executive answers to. NANA's Learning and Credentialing team asked us to write this guide, and we found we had said the same thing independently. The hardest parts of a first year are not the ones a job description warns you about.

We each had a first year that looked nothing like what we expected walking in. The org chart in your head on day one is wrong, and it takes months to learn who has real influence and who merely has the title that suggests it. One of us spent a first quarter assuming the person with the most tenure had the most say. Sometimes that is true. Often it is the person three levels down who actually knows how something works.

We do not claim a method that works for every association. We claim a sequence. The same twelve months produce the same pressures in a seven-person guild and in a forty-person institute, though the pressures arrive in different forms. NANA's member organizations run from two-person offices such as the Rocky Mountain Outfitters and Guides Council to the Institute for Civic Stewardship, with 44 staff. Where size changes the advice, the text says so.

The guide sets our own accounts beside six first-year cases from NANA member associations: the Guild of County Records Officers, the Council of Regional Airport Managers, the Society of Volunteer Fire Company Officers, the Society of Theater Production Managers, the Society of Wetland Restoration Contractors and the Guild of Stained Glass Conservators. Each case names the association, the year and the outcome. The executives are not named, because the lessons belong to the role and not to the person who held it that year.

One definition first. "First year" here means the twelve months from your first day on payroll, not the board's fiscal year and not the calendar year. Your budget cycle will rarely line up with your start date, so some months below overlap with a deadline the board set before you arrived. Section 6 explains how to handle that overlap.

Table 1. The first year at a glance

MONTHS	MAIN TASK	THE TRAP	SIGN YOU ARE ON TRACK
1–2	Listen. Meet every direct report, every director and the long-tenured	Changing something visible to show energy	You can name three practices you now understand and had planned to change
3–4	Make the first real decision	Treating the decision as private when the whole office reads it as public	You wrote the reasoning down before you announced the choice
5–6	Learn what the board reacts to	Trusting the job description over the board's behavior	You keep a log of board comments and it has a pattern
7–9	Build your own record	Dismissing the predecessor, or deferring to "how it was always done"	A staff member cites one of your decisions as precedent
10–12	Present your first full budget	Passing along staff recommendations without visible reasoning	The board can say which priorities came from what you heard

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MONTHS 1–2: LISTEN BEFORE YOU CHANGE ANYTHING

By the end of this section you will have a conversation plan for your first eight weeks, a short list of things you must act on despite the advice to wait, and a way to record what you hear so that it survives month four. You will also know how to say what you are doing, so that no one mistakes quiet for drift.

Walter: Your board wants to see fresh leadership in action, and you want to show it. Resist both urges for two months. I have watched new executives announce a new priority, a restructured meeting or a policy update in week three, and spend month five undoing it.

Most early changes that executives later regret were made before they understood why the old practice existed. A meeting that looks inefficient from the outside may exist to prevent a specific past conflict. A reporting line that looks redundant may be the only channel through which one staff member's concerns get heard. Two months of one-on-one conversations with every direct report, key board members and long-tenured staff surfaces most of this history before you undo it.

Listening is work, and it needs a plan. Without one, the first two months fill with the urgent and the loud, and the quiet people never get a conversation. Schedule the full set in the first week and treat the meetings as immovable. A director who is told "I will call you in week five" waits patiently. A director who is never called starts to wonder.

WHO TO MEET, AND WHAT TO ASK

Table 2 shows the plan used in the first case below. The numbers will differ at your association, but the groups should not. Every group sees the organization from a different height, and the gaps between their answers are the most useful thing you will collect.

Table 2. A conversation plan for the first eight weeks, from the Guild of County Records Officers (2024)

GROUP	CONVERSATIONS	WEEKS	ONE QUESTION TO ASK EVERY PERSON IN THE GROUP
Staff (all six others)	6	1–3	"What is the one thing you do that nobody would notice until it stopped?"
Board (all eleven directors)	11	2–6	"What went wrong before I arrived that you do not want repeated?"
Past chairs	2	4–5	"What did you wish you had been told in your first year?"
Long-tenured members	4	5–8	"What would make you stop renewing?"
Total	23	1–8	

Ask the same question of every person in a group, and write down the answers in the person's own words. The repeated question lets you compare. A paraphrase written on Friday will already have been bent by what you heard on Thursday.

WORKED EXAMPLE: THE TUESDAY CALL AT THE GUILD OF COUNTY RECORDS OFFICERS

The Guild of County Records Officers, in Richmond, has 2,700 members and seven staff. Its new executive director started in January 2024 and scheduled the 23 conversations in Table 2 in the first week. By week two, four of the six staff had made the same complaint: the 8:15 Tuesday staff call, which ran 45 minutes, felt like a status meeting nobody needed. The executive had already drafted a plan to replace it with a written weekly update.

In the ninth conversation, a director who had served since 2017 explained why the call existed. In 2019 the guild had missed a filing deadline for records-retention certificates in 14 counties, because the person who knew the date was out and nobody else had seen it. The Tuesday call began the following month, and its first ten minutes were a roll call of every external deadline in the next 21 days. The staff had forgotten the reason.

The executive kept the call, cut it to 15 minutes and put the deadline roll call on a shared calendar every staff member could see. Attendance held at six of six, and the complaint stopped. The year-end summary to the board listed the call as the first thing learned, and the board chair repeated the story at the next meeting. Three of the 23 conversations had turned up the same history from different angles, and the executive would have heard none of them if the tour had stopped at the staff.

WHAT YOU CANNOT WAIT ON

Waiting is advice about preferences, not about emergencies. Four kinds of matter should be acted on in the first week: cash, compliance, safety and integrity. Check the bank balance and the next payroll date on day one. Ask for the calendar of external filings, including the annual return to the IRS and state charitable registrations, and copy every date into your own calendar. If anyone raises a concern about conduct or money, handle it the same day and tell the board chair.

Contracts deserve a quiet audit in the first month. List every vendor agreement with an auto-renewal clause and its notice date. A contract that renews in month five with a 90-day notice window means your decision date was in month two, before you finished listening.

WHAT TO SAY WHILE YOU WAIT

Quiet can be read as drift. Say what you are doing in plain terms, in your first staff meeting and your first note to the board: you are spending eight weeks meeting everyone, you will make no structural changes in that time, and you will report what you heard at the end of it. Then do exactly that. A date for the report is a promise that turns waiting into a plan.

Read before you listen. Two years of board minutes, three audited financial statements, the bylaws and the strategic plan will answer a hundred small questions you would otherwise spend conversations on. NANA's course on reading your Form 990 exists for this reason. Walk into each meeting with the one thing you could not learn from paper.

Keep a record of every conversation using the template in the appendix. One page per conversation, with the answer to the standard question, one surprise and one follow-up. By the end of week eight you will have 23 pages, or 9, or 40, and a pattern will be visible across them that no single meeting shows.

Before the end of month two, use this checklist.

- [ ] Every direct report has had a one-on-one of at least 45 minutes.
- [ ] Every director has had a call or a meeting, in an order that did not put the loudest first.
- [ ] You have asked at least two long-tenured staff who the informal decision-makers are.

> “I read two years of board minutes before I met anyone. I knew which questions had already been answered, so my conversations started where the paper stopped.
>
> DOMINIC FERRANTE, DEPUTY EXECUTIVE DIRECTOR, NATIONAL COUNCIL OF BUILDING OFFICIALS

- [ ] You have a calendar of every external filing and every contract notice date for the next 12 months.
- [ ] You have told staff and board, in writing, when you will report what you heard.
- [ ] You can name three practices you intended to change and now understand.

3
MONTHS 3–4: YOUR FIRST REAL DECISION

By the end of this section you will be able to take a first real decision in a way that holds up when the whole organization reads it as a signal. You will have a one-page decision memo, a rule for sorting decisions by how hard they are to undo and a plan for who hears the news first.

Walter: Sometime in month three or four, a decision arrives that cannot wait. It is usually a staffing question, a vendor renewal or a budget line that needs a call. This is also when most first-year mistakes happen. Month three is not riskier in itself, but it is the first point where you must use judgment and not just observation.

Whatever you decide, the entire organization will read it as a statement of your priorities. That is true of a hire above all, and it is true whether or not you meant it. Decide on the merits, then expect people to draw broader conclusions than the decision warrants and explain your reasoning more fully than seems necessary.

SORT THE DECISION BEFORE YOU MAKE IT

Not every decision deserves the same care. Sort the first ones by how hard they are to reverse and how many people will read meaning into them. A room booking or a vendor trial can be made quickly and corrected quietly. A hire, a firing or a multi-year contract deserves a written memo and at least two outside opinions.

	FEW PEOPLE READ MEANING INTO IT	MANY PEOPLE READ MEANING INTO IT
Easy to reverse	Decide this week. Correct without ceremony	Decide, but announce it as a trial with a review date
Hard to reverse	Decide after one trusted conversation	Write the memo. Take two opinions. Brief the board chair. Explain in person

Table 3. Sorting early decisions

The lower right cell is where first-year mistakes cluster, and it is also where the urge to move fast is strongest. Most of the pressure to decide comes from the board's eagerness or your own. Ask who will actually be harmed by a two-week delay, and write the answer down. The answer is often nobody.

WORKED EXAMPLE: THE PROGRAMS DIRECTOR AT THE COUNCIL OF REGIONAL AIRPORT MANAGERS

The Council of Regional Airport Managers, in Denver, has 340 member airports and 11 staff. In 2023 its new executive faced a vacancy in the director of programs role in month three. The obvious internal candidate, a conference coordinator with six years at the council, had never managed people. An outside candidate with 12 years of programs experience at a state aviation office had applied.

The executive weighed the two on the merits and hired the outside candidate, at a salary of $118,000. Within a week, two of the eleven staff asked the executive in private whether internal promotion was now closed. The decision had been reasonable. What the staff heard was that a six-year coordinator, passed over, was the model of what happens to people who stay.

The executive had not prepared for that reading, and the repair took five weeks. A one-page hiring rule went to all staff: internal candidates interview first for any opening at or below manager grade. The coordinator was offered a stretch assignment with a written 12-month path. When the events manager role opened the next spring, the coordinator applied, interviewed first and was promoted. The executive's note afterward put the lesson in one sentence: the hire was correct, and the explanation was late.

WRITE THE MEMO FIRST

A decision memo is one page. Its job is to make you say the reasoning out loud before anyone else hears it. State the decision, the two alternatives you rejected, the reason in two sentences, the cost, the date by which it can still be reversed and the people who will notice. If you cannot fill the page, you are not ready to decide.

Then decide who hears the news, and in what order. The people most affected hear first and in person. The board chair hears next, before any other director, so that a question at the next meeting surprises neither of you. Everyone else gets a short written note that repeats the reasoning in the memo. A decision heard secondhand is always read as larger and colder than the same decision heard from you.

Before you announce your first real decision, use this checklist.

- [ ] I have written the one-page memo, and it fits on one page.
- [ ] I have named the two alternatives I rejected and the reason in two sentences each.
- [ ] I know which cell of Table 3 this decision sits in.
- [ ] The people most affected will hear it from me, in person, before anyone else.
- [ ] The board chair has heard it before any other director.
- [ ] I have written down what I expect people to read into it, and what I will say about that.

> “A decision explained in two sentences is a decision. A decision explained in twenty is a defense.
>
> HARUKO TANAKA, CHIEF FINANCIAL OFFICER, ALLIANCE OF REGIONAL CREDIT UNIONS

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MONTHS 5–6: READING THE BOARD'S REAL EXPECTATIONS

By the end of this section you will be able to compare what your board says it wants with what it reacts to, using a simple log. You will also know the question that gets a board to tell you what went wrong before you arrived.

Gordon: From the chair's seat I can tell you that a board's written expectations and its actual ones are different documents. The job description says "strategic leadership." Then a director spends ten minutes on how long a member waited for a reply. A board that says it wants vision will often react hardest to operational details, such as response time on member inquiries or the tone of a routine email.

This is rarely a contradiction. It reflects what the board has seen go wrong, and you were not there to see it. Track what directors comment on, in meetings and in the hallway, and ignore neither the strategic plan nor the pattern. Where they differ, ask.

HOW TO KEEP THE LOG

The log is a plain table. Each row is one comment from a director, in a meeting, an email or a hallway. Write the date, the director, what they said in their words and which of five categories it falls into: strategy, finance, operations, members or people. After five months, count.

The count will not prove a theory, but it points to where you should ask. A director who raises the same operational detail three times in a quarter is telling you something the strategic plan does not say.

WORKED EXAMPLE: THE SOCIETY OF VOLUNTEER FIRE COMPANY OFFICERS

The Society of Volunteer Fire Company Officers, in Frederick, Maryland, has 5,600 members and nine staff. Its new executive director came in with a job description that named three priorities: a training-grants program, a membership drive and "strategic positioning with state agencies." The board of 12 spoke warmly about all three in the hiring process. In month five, the executive reviewed the log kept since the first board meeting.

Table 4. Board comments logged in the first five months, by category

CATEGORY	COMMENTS	SHARE	MOST FREQUENT SUBJECT
Operations	23	56%	Turnaround on member inquiries, delivery of the monthly magazine
Finance	7	17%	Cash position after the spring conference
Strategy	6	15%	State agency relationships
Members	3	7%	Training grants
People	2	5%	Staff turnover in the front office
Total	41	100%	

Twenty-three of 41 comments, 56 percent, were about operations. The job description and the board's praise were about strategy. The executive asked the board chair, over coffee, what had gone wrong before. The answer was a benefits notice sent two weeks late in 2021, which had left roughly 300 families unsure of their coverage for a month. Three directors had taken calls from angry members, and none had mentioned it since.

The executive kept the three stated priorities and added a seven-day response standard for member inquiries, which the front office could meet with no new staff. A monthly one-page service report gave the board response times and delivery dates. In the next five months the log held 38 comments, and only 6 were about operations, against 14 about strategy. Nothing in the job description had changed. The directors now had evidence the old failure would not recur.

THE QUESTION THAT OPENS THE BOARD

Directors rarely volunteer the history behind their reactions, because to them it is not history. Ask directly, and ask one at a time. "What went wrong before I arrived that you do not want repeated?" is the most useful question in this guide. It is also the one most new executives never ask.

Do not defend the old failure and do not defend your predecessor. Listen, write the answer down and ask what a good outcome would have looked like. Then tell the board what you will do about it. Section 9 describes the 90-day check-in and the six-month self-assessment, which give you two scheduled moments to share what you have learned.

Before the end of month six, use this checklist.

- [ ] I have a log of board comments with at least 25 entries.
- [ ] I have counted comments by category and looked at the biggest one.
- [ ] I have asked at least four directors what went wrong before I arrived.
- [ ] I have told the board what I heard, in writing, and what I am changing in response.
- [ ] I have compared the job description, the strategic plan and the log, and I can say where they differ.

> “A director's irritation is data. Behind every comment about a late reply is a bad week I did not see.
>
> YOLANDA PRUITT-AMES, EXECUTIVE DIRECTOR, COUNCIL OF EARLY CHILDHOOD EDUCATORS

5

MONTHS 7–9: THE COMPARISON TO YOUR PREDECESSOR

By the end of this section you will be able to recognize the two overcorrections that slow the end of the comparison, and you will have a decision log that gives staff a record of your choices to cite. You will also know what to do about a predecessor who is still close to the organization.

Walter: Every new executive is compared to the one before, aloud or silently, for most of the year. Months seven through nine are the hardest stretch, because the comparison does not stop on a date. It fades as you build a record of your own.

You will know it has faded when a staff member, facing a current question, cites a decision you made instead of something your predecessor did. In my experience and in the executives I have mentored, that happens around month nine or ten. You cannot force it. You can avoid the two overcorrections that delay it.

RECOGNIZING THE TWO OVERCORRECTIONS

Both feel like good judgment from the inside. Dismissing the past feels like decisiveness, and deferring to it feels like humility.

	DISMISSING THE PREDECESSOR	DEFERRING TO "HOW IT WAS ALWAYS DONE"
What you say	"That was before my time." "We are going to do this properly now."	"Let us not rock the boat." "That is how the board likes it."
What staff hear	Years of their work were wrong	Nothing will change, and judgment is not wanted
What it costs	Long-tenured staff withdraw their knowledge	The organization stalls, and the board asks why it hired you
Repair	Name two things the predecessor did well and say why they stay	Choose one inherited practice and change it, with the reasoning written down

Table 5. The two overcorrections

BUILDING A RECORD PEOPLE CAN CITE

People cite what they can find. If your decisions live in your head and in scattered emails, staff will go on citing the predecessor, because the

predecessor's decisions are in the files. Start a decision log in month three or sooner and keep it in a shared place. Each entry takes five minutes: the date, the question, the decision, the reason in one sentence and the person who asked.

The log serves two purposes. It gives staff something to point at, and it forces a discipline on you. A decision you cannot summarize in one sentence was probably not a decision.

WORKED EXAMPLE: THE SOCIETY OF THEATER PRODUCTION MANAGERS

The Society of Theater Production Managers, in Chicago, has 1,100 members and five staff. Its new executive started in March 2023 and began a decision log in month three. By the end of month nine the log held 31 entries. For two stretches of three months, the executive tallied how staff talked in meetings.

In months 7 to 9, staff cited a log entry 4 times and began a sentence with the predecessor's name 11 times. In months 10 to 12, the counts reversed: 14 citations of the log and 3 mentions of the predecessor. The turn came when a staff member asked how to handle a late sponsor payment, and a colleague answered, "We decided in May to send the second notice at 15 days, not 30." The executive did nothing special in the final quarter. The log had done the quiet work.

IF YOUR PREDECESSOR IS STILL AROUND

Some predecessors retire to a seat on the board, a consulting contract or a long lunch with the chair. Agree the terms of contact at the start, in writing, with the board chair present. A reasonable default is one conversation in the first month to ask what they would want you to know, then contact only by your invitation for a year. If the predecessor left under difficult circumstances, describe facts and decisions and leave out character.

Before the end of month nine, use this checklist.

- [ ] I have a decision log with at least 20 entries, and staff can see it.
- [ ] I can name two things my predecessor did well that I have kept.
- [ ] I can name one inherited practice I have changed, with the reason written down.

> “I used to say 'the previous director.' Staff stopped saying it when I stopped saying it. We started saying 'we decided.'
>
> HOLLIS GREENLEAF, EXECUTIVE DIRECTOR, ROCKY MOUNTAIN OUTFITTERS AND GUIDES COUNCIL

- [ ] I have agreed the terms of contact with my predecessor, in writing, with the board chair.
- [ ] I have counted how often staff cite my decisions and how often they cite my predecessor's.

6

MONTHS 10–12: YOUR FIRST FULL BUDGET CYCLE

By the end of this section you will be able to prepare and present your first full budget so that the board sees your reasoning, not just a set of numbers. You will have a timeline for the ten weeks before the vote and a way to frame three trade-offs.

Gordon: The first full budget is where a year of learning gets tested. You now know enough to make real trade-offs, where before you inherited a budget someone else built or deferred to staff. Do not simply carry staff recommendations to the board. A board that has watched you listen for a year wants to see, in your first budget, that the listening produced priorities.

Your start date and your fiscal year will rarely match. If you started in January at an association whose year runs July to June, your first budget is due in month five, not month ten, and this section applies in month five. NANA's own fiscal year runs July to June, so our budget cycle falls in the spring. Match the lesson to your calendar and keep the order: listen, learn the board, then present.

A TEN-WEEK TIMELINE

A budget presented well is a budget prepared early. Work backward from the board vote, which is the fixed point.

- Week 10: meet the treasurer and the staff member who knows the numbers best. Agree the assumptions on dues, attendance and inflation.
- Week 8: ask each department head for a ranked request with the reason.
- Week 6: test a first draft with the treasurer.
- Week 4: show the finance committee the draft and the three trade-offs.
- Week 2: send the board a written summary.
- Vote: present for 15 minutes and take questions for 30.

FRAME THREE TRADE-OFFS

A budget has hundreds of lines, but a board can discuss three. Choose the three choices that most clearly reflect what you learned and say so. For each one, state what you are choosing, what you are giving up, the dollar

effect and the reason. Directors who see three clear trade-offs feel in control of the plan. Directors who see 300 lines feel handed a document.

WORKED EXAMPLE: THE SOCIETY OF WETLAND RESTORATION CONTRACTORS

The Society of Wetland Restoration Contractors, in Wilmington, North Carolina, has 280 member firms and five staff. In 2024, in its new executive's tenth month, the board asked for a full-year budget. The prior year's budget, built by the previous director, had balanced exactly at $1,132,000, with $20,000 going to reserves. The executive had spent the year listening and reached three conclusions: the annual meeting hotel was too expensive, the membership desk was understaffed, and the reserve was thin.

Table 6. Proposed budget against prior year, rounded to the nearest thousand dollars

LINE	PRIOR YEAR	PROPOSED	CHANGE
Dues (280 firms, about $2,185 each)	$598,000	$612,000	+$14,000
Annual meeting	$301,000	$318,000	+$17,000
Sponsorships	$149,000	$154,000	+$5,000
Education	$84,000	$96,000	+$12,000
Total revenue	$1,132,000	$1,180,000	+$48,000
Salaries and benefits	$436,000	$488,000	+$52,000
Annual meeting costs	$300,000	$259,000	−$41,000
Education costs	$69,000	$78,000	+$9,000
Member services and communications	$112,000	$117,000	+$5,000
Rent and operations	$95,000	$97,000	+$2,000
Audit and contract services	$100,000	$100,000	$0
Reserve contribution	$20,000	$41,000	+$21,000
Total expenses and reserve	$1,132,000	$1,180,000	+$48,000

The executive presented three trade-offs, each tied to something heard in the year. Moving the next annual meeting to a lower-cost venue saved $41,000, at the price of a 20-minute longer drive from the airport that members had raised in 11 conversations. Adding a part-year membership coordinator for $37,000 answered nine complaints about slow renewals. The remaining $15,000 of the salary increase was a 3.5 percent raise for all

five staff, the first in two years, and a reserve contribution of $41,000 began closing the gap the audit letter had flagged.

The board approved the budget 10 to 1, after 40 minutes. The dissenting director objected to the venue change and said afterward that the reasoning had satisfied them, though the answer had not. In the 12-month review that followed, the board chair named the budget presentation as the moment the board decided the executive was doing the job.

The budget and the 12-month review are the board's two best chances to see how you think, so schedule the review near the vote, or at month 12 if your vote falls earlier. Section 9 gives the full calendar.

Before the vote, use this checklist.

- [ ] I have agreed the key assumptions with the treasurer, in writing.
- [ ] Every department head has submitted a ranked request with a reason.
- [ ] I have chosen three trade-offs and can state the cost of each in dollars.
- [ ] The finance committee has seen the draft at least four weeks before the vote.
- [ ] The board has my written summary at least two weeks before the vote.
- [ ] My presentation is 15 minutes, and I have left 30 for questions.

> “Staff recommendations tell me what people want. A budget tells me what the executive chose. I want to see the choosing.
>
> HARUKO TANAKA, CHIEF FINANCIAL OFFICER, ALLIANCE OF REGIONAL CREDIT UNIONS

7
TWO RELATIONSHIPS THAT DECIDE THE YEAR

By the end of this section you will know how to build the relationship with your board chair and how to approach the senior team you inherited. Both relationships were assigned to you, and neither will form on its own.

A NOTE ON THE BOARD CHAIR RELATIONSHIP

Gordon: You did not choose your board chair, and your chair did not choose you. The relationship is assigned, not selected, and it is worth saying so out loud instead of pretending it is a chosen partnership. I chair a board whose executive is eight years into the job, and the lesson has held at both ends: trust has to be built. It cannot be assumed on day one.

The practice we recommend is a standing, unstructured monthly call between you and your chair, separate from board meeting preparation, with no agenda. Executives and chairs who rely only on formal meeting contact take longer to reach the candor both say they want. Keep the call to 30 minutes at the same time each month, and open with three questions: what is on your mind, what are you hearing from directors, and what should I be doing that I am not? Send no deck beforehand, and move any topic that needs a decision to the regular channel.

A chair who hears from you only when something is wrong learns to dread the phone. A chair who hears from you monthly, about small things, takes the hard call as part of a pattern. Share one piece of good news and one worry in every call, and the worry will not read as alarm. You will disagree with your chair at some point. Do it in the call, not in the board meeting: say what you think and why, ask what the chair sees that you do not, and agree on what the full board will hear.

BUILDING YOUR OWN SENIOR TEAM

Walter: Most new executives inherit a senior team they did not hire. Whether and when to change it is one of the most consequential questions you will face, and one executives often rush. Reorganize in the first six months, before you understand each person's real contribution against their title, and you risk losing knowledge the organization did not know it depended on until it was gone.

My practice, carried from my own transition, is to give every senior staff member a genuine first year to show fit with the new direction. I give

> “I want bad news early, by phone, from the executive. I do not want to find it in a board packet.
>
> MARGARET OYELARAN, DIRECTOR ON NANA'S BOARD AND PRESIDENT, INSTITUTE FOR CIVIC STEWARDSHIP

regular, specific feedback along the way instead of passing a snap judgment in the first quarter. There is one exception. A senior staff member whose conduct raises an integrity or workplace concern gets immediate action regardless of tenure. That is a separate question from performance fit, which benefits from more time.

Keep fit and conduct in separate files, and treat any item in the conduct file as urgent. Specific feedback is the part executives skip. "I would like to see more initiative" is not feedback. "Three of your reports waited more than a week for an answer from you, and I would like that to be two days" is feedback.

Small associations face a different version of the question. At a four-person association the team is the whole office, and every conversation described in section 2 is also a team-building conversation.

Before the end of month six, use this checklist.

- [ ] A monthly 30-minute call with the board chair is on both calendars through the end of year one.
- [ ] I have told the chair I will disagree in private first, and I have asked for the same.
- [ ] I have given each senior staff member written, specific feedback at least once.
- [ ] I keep conduct concerns and fit concerns in separate files.
- [ ] I have made no senior staffing change based on first impressions alone.

> "With four people, there is no senior team to inherit. There is just a team, and you are the newest member of it, whatever it says on the door.
>
> SIGNE THORVALDSEN, EXECUTIVE DIRECTOR, CASCADIA FOREST PRODUCTS COUNCIL

8

HANDLING YOUR OWN MISTAKE IN PUBLIC

By the end of this section you will have a four-step response ready for your first visible mistake, and you will know which phrases to avoid. The mistake itself is nearly certain. How you handle it is the part you control.

Gordon: You will make at least one visible mistake this year. It might be a policy change that went out garbled, a decision the board overturned or a public statement that needed correcting. How you handle that first one matters more for staff and board trust than the mistake does.

Say the mistake directly and specifically. Do not recast it as a misunderstanding or as someone else's miscommunication. Staff and board members are watching for one thing in that moment: whether you can be wrong in public without either collapsing or deflecting. Get that right once, early, and it buys real trust for the rest of the year.

A FOUR-STEP RESPONSE

The four steps are the same whether the error is a wrong number in a member email or a decision the board overturned. First, say it plainly, in the first sentence: "I made an error." Second, say exactly what the error was, without adjectives. Third, say what you have already done to fix it and what the people affected will see. Fourth, say what you will change so that it does not recur, and mean it.

Do these in order, and do them quickly. A correction on the day of the mistake is a note. A correction a week later is a story. Send it to the people affected first, then to the board chair, and only then to anyone who has merely heard about it.

SAY	AVOID	WHY
"I made an error in the notice."	"There was some confusion about the notice."	The first names a person. The second names a fog
"The rate listed was $340. The correct rate is $365."	"A discrepancy in the rate."	Numbers let people check you
"We have corrected the template and every notice goes through a second reader."	"Mistakes happen."	A fix is a promise. A shrug is not
"Anyone who paid the lower rate keeps it for this year."	"We apologize for any inconvenience."	A remedy is specific. An apology without one is a form letter

Table 7. Words that help and words that hurt

WORKED EXAMPLE: THE GUILD OF STAINED GLASS CONSERVATORS

The Guild of Stained Glass Conservators, in Philadelphia, has 650 members and three staff. In month seven of 2024, its new executive sent renewal notices after the board approved a dues increase from $340 to $365. A template error meant that 112 of the 650 notices carried the old rate of $340. By the time a member pointed this out, 38 of those 112 had already paid.

The executive wrote to all 112 within 24 hours. The note began with "I made an error in your renewal notice," gave the two rates, and said that the 38 who had paid $340 would keep that rate for the year, a cost of $950 against the guild's budget. The 74 who had not paid were invoiced at the correct rate with a line of explanation and an offer to talk. The template now goes to a second reader before any mass send.

Of the 74, 71 paid at the correct rate within 30 days, and three called to discuss, and one of those asked to join the board's finance committee. The executive reported the incident in the next board packet in four sentences, with the $950 figure. The board chair said afterward that it was the first time she had seen the guild admit an error in writing, and that it raised her confidence in the next number she would be shown.

Before you send your next mass communication, use this checklist.

- [ ] A second person has read the notice against the source, not against my draft.
- [ ] I know who will be affected if the notice is wrong, and how many.
- [ ] I have a correction written in advance for the most likely error.
- [ ] If I make a mistake, the first sentence of the correction will say "I made an error."
- [ ] The board chair hears about any error from me, not from a member.

9

A FIRST-YEAR CALENDAR OF FORMAL TOUCHPOINTS

By the end of this section you will have a calendar of five standing touchpoints to put in place in your first month, with an agenda for each. You will also know how to use them so that the board hears what you have learned before it has to ask.

Walter: Beyond the monthly call with your chair, schedule four formal check-ins yourself. Do not wait for the board to ask for them.

- A 90-day informal check-in with the full board, structured around what you have learned and not a formal performance review
- A six-month written self-assessment shared with the board chair and executive committee, naming what is working and what you would do differently
- A twelve-month formal performance review, timed to align with the first full budget cycle under your leadership
- Quarterly one-on-ones with each direct report, separate from regular operational check-ins, focused on how the transition is landing from their side

Organizations that skip the 90-day and six-month touchpoints and wait for a single twelve-month review give both sides less chance to correct course during the months when correction is easiest. By month twelve, patterns have hardened into the organization's settled read on its new leader. Table 8 lists all five touchpoints, including the chair call.

Table 8. The first-year touchpoints, with owner and output

TOUCHPOINT	WHEN	WHO ATTENDS	LENGTH	OUTPUT
Board chair call	Monthly from month 1	You and the chair	30 minutes	None. Trust
90-day check-in	First regular board meeting after day 90	Full board	45 minutes	A one-page summary of what you learned
Direct-report one-on-ones	Quarterly, months 3, 6, 9, 12	You and each direct report	45 minutes	One note per person, kept private
Six-month self-assessment	Month 6	Chair and executive committee	Written, discussed in 60 minutes	A two-page assessment
Twelve-month review	Month 12, near the first budget vote	Full board or a review committee	90 minutes	Written review, with goals for year two

THE 90-DAY CHECK-IN

The 90-day check-in is a conversation at a regular board meeting, in which you say what you have learned and ask what you have missed. Structure it in three parts: what I have heard, what surprised me and what I am not yet sure about. Spend ten minutes on each and leave fifteen for questions.

The check-in moves the first hard conversation from month eight, when patterns are fixed, to month three, when they are not. A board that hears "I am not yet sure" at 90 days hears honesty. At nine months it hears drift.

THE SIX-MONTH SELF-ASSESSMENT

The self-assessment is two pages, written by you and sent to the chair and the executive committee a week before they discuss it. Use three headings: what is working, what I would do differently and what I need from the board. Give each heading real content. "What is working: the weekly staff call, now at 15 minutes, and the renewal calendar, which has caught two missed notices" is useful. "What is working: communication" is not.

THE QUARTERLY ONE-ON-ONES

The direct-report one-on-ones are the part executives skip when the calendar fills. They are not operational. Ask each person three questions: how is the transition landing for you, what are you worried about that you have not told me, and what should I stop doing? Write the answers down, keep them private and act on at least one before the next meeting, so the person sees that asking leads somewhere.

THE TWELVE-MONTH REVIEW

Offer the board a short written summary of what you set out to do at 90 days, what you did, what you would change and what you propose as goals for year two. If the board has a review form, complete it first and give them yours.

Use this checklist in your first month to put the calendar in place.

- [ ] The monthly chair call is on both calendars through month 12.
- [ ] The 90-day check-in is on the agenda of the first regular board meeting after day 90.
- [ ] The six-month self-assessment has a date, and the chair knows it is coming.
- [ ] Quarterly one-on-ones are in the calendar for every direct report.
- [ ] The twelve-month review is scheduled near the first budget vote, or at month 12 if the vote falls earlier.

10
WHAT TO KNOW ON DAY ONE

By the end of this section you will have a short list to pin up, and a checklist for the days before you start.

Pin up two lines. The org chart you are handed is a starting hypothesis, not a map, so ask a trusted staff member early who the informal decision-makers are. The rest of the year is the same move repeated: ask for the missing part of the picture, in person and on a schedule, and write down what you hear.

You will, at some point in the year, feel that you are failing. The feeling is nearly universal and a poor guide to the facts, so check it against the log and the decision record.

Before your first day, use this checklist.

- [ ] I have asked the board chair for the last two years of board minutes and read them.
- [ ] I have the last three audited financial statements and the current bylaws.
- [ ] I have blocked the first eight weeks for the conversations in Table 2.
- [ ] I have written the date on which I will report what I heard.
- [ ] I have a list of every external filing date and contract notice date for the next 12 months.
- [ ] I have the five touchpoints from Table 8 drafted into my calendar.

WHERE TO GO NEXT

NANA offers several programs that extend this guide, each taught by people who have done the work.

- **The New Executive's First Year.** An executive-level course taught by Walter Abernathy and Gordon Ashcombe. It follows this guide's calendar and gives you a live session with a cohort of other first-year executives.
- **Executive Succession Planning.** A course on how boards and executives plan a handover. It is useful both for an incoming executive

and for the board that hired one.

- **Audit Committee Essentials.** Taught by Dominic Ferrante, it covers what an audit committee asks and how an executive prepares for it.
- **Reading Your Form 990.** An on-demand course taught by Lorraine Petrakis, who owns NANA's budget. It prepares you for the reading you do in month one.
- **Inclusive Board Recruitment.** An executive-level course taught by Yolanda Pruitt-Ames and Adaeze Brathwaite, for the point at which your board turns over and you help shape who joins.
- **Board Governance Essentials Webinar.** A shorter session for the executive and the board chair together.
- **Chapter Leadership Intensive.** Held each October in Boston for incoming chapter officers across New England, and useful if your association has chapters of its own.
- **The Leadership Summit and the Fall Policy Forum.** The two events that anchor the NANA year, and the best places to meet peers who are in months three to twelve themselves.

If your association is a NANA member, your chapter's roundtable is the fastest way to find a peer one year ahead of you. Ask your chapter chair to introduce you to one.

APPENDIX: THE FIRST-YEAR RECORD

Three one-page records support everything above. Copy each into your own system, adapt the headings to your association and keep them current. They take about five minutes each time.

A. CONVERSATION RECORD

Table 9. Conversation record, one page per conversation

FIELD	WHAT TO WRITE
Date and length	The date and how long you met
Person and role	Name, role, years with the association
The standard question	The question you asked everyone in this group, and the answer in their words
One surprise	One thing you did not expect to hear
One follow-up	One thing you promised to do or find out, with a date
What I will not change yet	One practice you now understand and had planned to change

B. DECISION LOG

Table 10. Decision log, one line per decision

DATE	QUESTION	DECISION	REASON IN ONE SENTENCE	WHO ASKED
Example: March 12	When do we send the second sponsor payment notice?	At 15 days	Thirty days left too little time to collect before the quarter closed	Events manager
Example: April 3	Do we renew the printing contract?	Yes, for one year only	The three-year price advantage was $1,400, and our mailing list will change	Finance manager

C. BOARD COMMENT LOG

Table 11. Board comment log, one line per comment

DATE	DIRECTOR	WHAT THEY SAID, IN THEIR WORDS	CATEGORY
Example: February 14	Treasurer	"How quickly did we answer member emails last month?"	Operations
Example: February 14	Vice chair	"What is our plan for the state agencies?"	Strategy

Categories are strategy, finance, operations, members and people. Count them at month five and again at month eleven. If the pattern has moved, you have learned what the board wanted, and the board has learned you listened.



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