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# **CEO Onboarding for Nonprofit Boards: A Practical Guide to High-Trust Leadership Transitions**

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## Introduction

Leadership transitions are more than administrative changes; they are pivotal moments that test a board's foresight and stewardship. Without a clear onboarding plan, even the most promising CEO appointment can falter. A strong, board-led onboarding process ensures continuity, strengthens trust, and positions the organization for long-term success in achieving its mission.

This guide outlines five disciplines and field-tested best practices that nonprofit boards can use to effectively steward CEO transitions.

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**"A clean, intentional runway protects new leaders from operational noise."**

— *Whit Whitaker, Former President, King University*

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### 1. Start Before Day One:

#### Board Preparation and Transition Planning

Great onboarding begins well before the incoming leader steps into the role.

##### Board Actions:

- Identify the type of transition (planned, emergency, founder exit, etc.) and tailor onboarding accordingly
- Provide the new CEO with a curated set of essential documents and institutional history
- Create a stakeholder map with introductions and handoff strategies
- Clarify governance vs. operational authority using the board manual
- Engage a coach or small advisory group to support the new leader

### 2. The First 30 Days:

#### Building Trust and Organizational Insight

The early days set the tone for the new leader's credibility and effectiveness.

Boards set the foundation for this phase by designing intentional listening opportunities, modeling cultural values, and ensuring early alignment between governance and operations.

##### Key Milestones:

- Initial board alignment check-in
- Cultural immersion and values-based engagement
- Listening sessions with staff and key constituents
- Summary report of early observations

##### Tools:

- One-page briefings by department
- Priority documents (can be as many as 60+)
- Stakeholder insights dashboard

### 3. Days 30-60:

#### Clarity and Internal Alignment

Once initial trust is established, attention shifts to strategy and team cohesion. Boards can support this phase by reinforcing communication rhythms and ensuring shared understanding of near-term goals.

#### Key Actions:

- Host a leadership team retreat
- Align strategic priorities for the next 6–12 months
- Confirm communication rhythms with the board chair
- Begin external outreach to donors and partners

### 4. Days 60–90:

#### External Messaging and Long-Term Trajectory

By 90 days, the CEO should begin establishing direction and momentum. Boards play a key role by offering constructive feedback, affirming progress, and guiding external positioning.

#### Key Deliverables:

- 6–12-month strategic roadmap
- External messaging and public positioning
- First board presentation: early wins, strategic vision, and logic model

### 5. The Board's Ongoing Role:

#### Stewardship Without Overreach

Boards serve as mission control, providing direction and support without micromanaging.

#### Best Practices for Boards:

- Define boundaries of governance and operations
- Provide structured encouragement and institutional memory
- Schedule quarterly check-ins
- Support coaching and learning as part of onboarding

### Field-Tested Examples

#### Compassion International:

Jimmy Mellado, President and CEO of Compassion International, prioritized humility, cultural continuity, and public unity with his predecessor, ensuring a respectful and trusting transition. His approach was anchored in the “Four Ls”: Listen, Learn, Love, and Lead. These helped him earn trust and build credibility before implementing change. This approach was supported by a board that emphasized continuity and honored legacy.

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**"The best gift a board can  
give a new CEO is  
context."**

— *Tom DeVries, CEO, Citygate  
Network*

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#### Our Daily Bread Ministries:

The transition was communicated clearly to internal teams, ministry partners, and external stakeholders, ensuring alignment and minimizing disruption. Handle founder transitions with grace and structure; honor legacy without tethering the future to it. The ministry emphasized prayer and spiritual discernment throughout the search and selection process which was consistent with its deeply rooted faith identity.

### Field-Tested Examples

#### Missouri Baptist University:

Internal candidate Dr. Keith Ross benefited from a formal succession plan, early board engagement, and an emeritus role for his predecessor. The board's intentional design of the transition, grounded in clarity, timing, and symbolic handoffs, enabled a smooth and trusted leadership handover.

#### Citygate Network:

Citygate Network CEO Tom DeVries emphasizes humility over hubris in leadership transitions. His five principles for purposeful transitions are:

- Check hubris at the door – Both incoming and outgoing leaders must embrace humility.
- Mission-first mindset – Prioritize purpose over personal positioning.
- Assess the current reality – New leaders must understand what is real.
- Clarify the roadmap – Establish where the organization is going and who's on board.
- Lean into relationships – Trust and credibility are built person-to-person.

The Citygate board reinforced these principles by supporting both relational and operational readiness.

#### Council for Christian Colleges & Universities (CCCU):

Dr. David Hoag, President and CEO underscores the importance of beginning onboarding at the moment of appointment, not the first day in the office. His field-tested practices reflect a proactive, structured approach to leadership transition:

- Start early. Hoag conducted over 30 staff interviews before day one to understand culture, priorities, and pain points.
- Define roles with precision. The CCCU board clarified decision rights, travel expectations, and email responsibilities for both outgoing and incoming presidents.
- Honor the outgoing leader. A structured overlap with Dr. Shirley Hoogstra modeled trust and collegiality.
- Steward both sides of the transition. The board invested in supporting the former president's exit as intentionally as the new president's arrival.
- Create organizational clarity. Early briefings and stakeholder maps accelerated Dr. Hoag's effectiveness and credibility.

The CCCU board's deliberate planning made this transition not just seamless, but strategic.

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**"Transitions should be part of an institution's rhythm, not a crisis response."**

*– Dr. Keith Ross, President, Missouri Baptist University*

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### Conclusion: Transition as a Strategic Opportunity

Leadership transitions are more than operational necessities they are moments of strategic consequence. When led well by the board, onboarding becomes a launchpad for long-term impact, not just a smooth handoff. An intentional, board-driven onboarding process:

- Preserves trust with staff, donors, and stakeholders.
- Honors the past while creating space for new leadership.
- Equips the incoming CEO to lead with clarity and momentum from day one.

With discipline, care, and vision, boards can ensure that CEO transitions do not pause the mission, they strengthen it.

### Five Disciplines of Board-Led Onboarding

#### 1. Lead with intentionality

Start the transition with clarity, not crisis.

#### 2. Create space to listen before leading

Support the new CEO in understanding people, priorities, and culture.

#### 3. Honor and define the past

Celebrate legacy while empowering new leadership.

#### 4. Provide strategic tools, not just introductions

Equip the new leader with briefing materials, maps, and context.

#### 5. Clarify governance roles and rhythms

Reinforce a healthy board-CEO partnership from the outset.

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**“In every transition, clarity of mission and trust in leadership are non-negotiables. You can’t assume alignment you have to build it, communicate it, and protect it. Good transitions don’t just hand over the keys, they recalibrate trust, mission, and momentum. That’s true in the military, in higher ed, and in every mission that matters.”**

*— Gen. Jack Briggs (USAF, Ret.), Vice Chancellor, University of Colorado Boulder*

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At CarterBaldwin Executive Search, we specialize in guiding nonprofit boards through critical CEO transitions with clarity, intentionality, and proven results. Leveraging decades of experience and a track record of successful leadership transitions at hundreds of organizations such as **World Vision**, **Mercy Ships**, **Bethany Christian Services**, **Feed the Children**, and **Young Life**, and leading universities, **Wheaton College**, **Gordon College**, and **Liberty University**; our strategic onboarding frameworks ensure your mission advances seamlessly through each new chapter of leadership.

**With humility, clarity,  
and strategic support,  
CarterBaldwin ensures  
your mission isn't  
disrupted; it's  
strengthened.**

## CarterBaldwin Executive Search: Proven Transition Excellence

### Our Approach

- Strategic Onboarding Frameworks
- Cultural Stewardship
- Leadership Clarity & Coaching
- Field-Tested Best Practices

### Our Impact

- Smooth, mission-aligned leadership transitions
- Sustained trust and continuity with stakeholders
- Empowered CEOs and clearly defined board roles
- Enhanced organizational stability and performance

### Why Boards Choose Us

- Deep expertise in nonprofit transitions
- Track record preserving organizational values
- Integrated executive coaching and advisory
- Proven processes refined through real-world transitions

## Contact

For more information on CarterBaldwin's CEO succession planning or onboarding resources for a nonprofit or university president, contact Bill Peterson, Partner, at [bpeterson@carterbaldwin.com](mailto:bpeterson@carterbaldwin.com).