

Guidance for First 30-60-90 Days After Starting a New Job

This guide offers suggested tasks and points of understanding to consider when stepping into a new role. The list addresses People (relationships); Policies, Processes and Programs; and Priorities – so that new staff can make space for both gathering information, and sorting through their approach to the responsibilities of the role and the knowledge transfer process. It is recommended that the first 30 days be devoted to discovery, the next 30 for analyzing and clarifying, and the final month of onboarding focus on planning forward. Feel free to adapt the tasks to items more appropriate for your organization or the scope of the role in question.

<https://www.ccaha.org/succession>

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The First 30 Days: Discovery

People	Policies, Processes & Programs	Priority
<ul style="list-style-type: none"> • Get to know key staff members (and volunteers in staff roles): understand their job roles and how you will interact with them • Meet with Board members (or leaders outside your department); be sure to understand what you can expect from them, and what they expect from you. • Engage with patrons/visitors /members and other audiences • Identify vendors and others key business contacts. • Identify partners and gather background information on the relationship • Make a list of key funders and donors to reach out to. 	<ul style="list-style-type: none"> • Identify the most Frequent, Important and Complex processes (FIC) and procedures you will need to learn • Walk through the FIC items, noting any areas that need clarification. Document as you go, or update existing documentation. • Familiarize yourself with the collections in a way that feels natural to you; take note of questions you have. • Review existing collections management policies and note any areas that might need updating. • Review any internal or consultant-developed assessments, surveys, or studies related to collections care. 	<ul style="list-style-type: none"> • Identify anything needed for access that is essential to your new job (passwords, keys, etc). • Be sure you understand any financial aspects of your role – how to get things paid for, how to collect and access funds. • Locate any existing documentation; understand the range of what's available, note anything missing. • Familiarize yourself with software and supplies required for the job. • Make a daily, weekly and monthly schedule of priorities for your role. • Identify any urgent matters (ie, environmental concerns, etc) and, if they cannot be handled immediately, make a plan to do so. • Review the organization's strategic plan and understand how your role relates to it.

Day 31-60: Analyze and Clarify

People	Policies, Processes & Programs	Priority
<ul style="list-style-type: none"> • Set recurring check-ins with key superiors, direct reports, and other contacts, to ensure accountability and access while you are still learning the ropes • Meet one-on-one with additional stakeholders who can provide insight about the organization and your role, and stakeholders who expect to have contact with you. Pay special attention to people who can help you fill in some gaps in your knowledge about your collections or key processes. • Make it a point to engage with any external groups that are connected to your organization (professional associations, partners, etc) • If you are supervising staff or volunteers, take stock of areas where they need additional instruction or development, and make a plan to provide it yourself or through outsourcing. 	<ul style="list-style-type: none"> • Do a deeper assessment of the collections and prioritize areas that need special attention or more investigation. • Identify any processes beyond the FIC set, explore them and document. • As you engage in work, consider existing policies and note where they are helpful or inadequate. If policies are not in place, prepare a draft based on what you know so far. • Review your standard workflows and make adjustments as needed; update documentation as appropriate. 	<ul style="list-style-type: none"> • Expand your calendar to note key deadlines throughout the rest of the year (ie, grant reports, contract/registration renewals, etc.) • Identify additional skills or knowledge you need to perform your duties. Speak with your manager about how to acquire these. • Develop a useful framework to prioritize your work – is it importance/urgency? Impact/effort? • Take stock of tasks on your plate that could be reassigned, or duties performed by colleagues where you'd like more control/access/visibility. Be prepared to discuss these with your supervisor.

Days 61-90: Planning Forward

People	Policies, Processes & Programs	Priority
<ul style="list-style-type: none"> • Consider adjustments to job descriptions and update a continuation of operations plan, assigning roles. • Secure meetings with any tertiary stakeholders. • Make a plan to keep engaged with all of your key contacts. • Make a long-range commitment to develop yourself, your direct reports, and your volunteers, toward being better able to step into new roles 	<ul style="list-style-type: none"> • Make a long-range plan for any lingering documentation needs- either filling in missing pieces or creating what does not exist. • Make a long range plan for reviewing and updating collections policies. • Identify strategic goals for the collection (or your area of responsibility) and discuss these with your supervisor. • Define ongoing practices to support better documentation and knowledge transfer 	<ul style="list-style-type: none"> • Be sure to experience all key events, major projects, tasks, in the organization's or department's calendar. • Take stock of "quick hits" – improvements you have made to date, or items that are ripe for adjustment now that you are familiar with how everything works. • Reflect on the knowledge, skills and qualities that have helped you find success during this transition; be prepared to harness these strengths as you move forward!