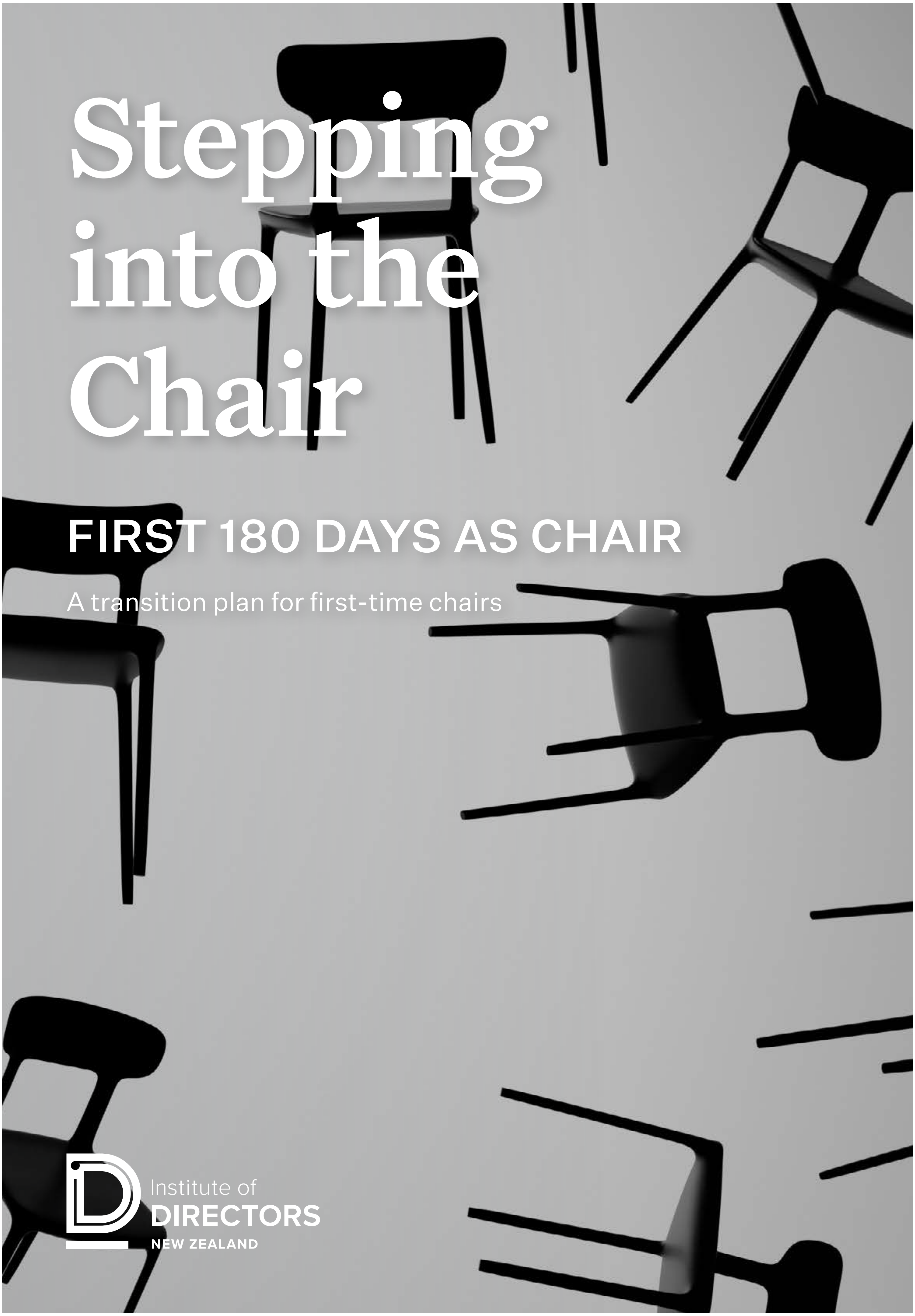

Stepping into the Chair

FIRST 180 DAYS AS CHAIR

A transition plan for first-time chairs

Institute of
DIRECTORS
NEW ZEALAND

Introduction

The first 180 days as chair are about building the foundations for effective board leadership. That means understanding the board, setting expectations, strengthening key relationships and establishing practices that can be sustained over time.

Some first-time chairs step up from within a board they already serve on. Others join a board as chair. If you are stepping up from within, much of the context may already be familiar, but relationships and expectations may need to shift. If you are joining as chair, the early period will require deeper orientation before deciding what needs to change. In either case, you may also inherit expectations, sensitivities or unresolved issues from the previous chair's tenure or the transition itself. Understand these before deciding what, if anything, needs to change.

This resource is part of Stepping into the Chair, a set of practical IoD resources for first-time chairs. The set includes the Transition guide, First 180 days as chair transition plan, Chair–CEO relationship guide and Chair moves.

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Use this plan as a guide and adapt it to the organisation, the board and the circumstances of your appointment.

PRIMARY OBJECTIVE	CHAIR FOCUS	WHAT GOOD PROGRESS LOOKS LIKE
Before starting: Prepare to shift		
Understand your starting point	Read core governance documents, recent papers and key organisational material from the chair's perspective. Identify what you still need to understand before deciding whether anything should change.	You understand the board's formal authority, current priorities, key risks and upcoming decisions. Even if you are not new to the board, you are beginning to see familiar information from the chair's perspective. You are not treating the transition itself as a reason to make changes.
First 30 days: Shift and understand		
Listen, observe and build trust	Meet key people in your capacity as chair, observe board practice and understand expectations.	You have a clear picture of how the board works, what people expect and where early attention may be needed.
First 90 days: Set expectations		
Clarify how the board will work	Confirm chair-CEO arrangements, board agenda approach, contribution expectations and governance boundaries.	The board and CEO understand how you intend to chair and where expectations may need to shift.
First 180 days: Strengthen and sustain		
Agree priorities for ongoing board effectiveness	Review board focus, decision quality, director contribution, evaluation needs, follow-through and chair feedback.	The board has agreed a small number of improvement priorities and there is shared ownership of change.

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Before starting

Objective: understand your starting point

> ***Reflection:*** *What do I need to understand before I start changing how this board works?*

Before the first meeting, focus on understanding the organisation, the board's authority and what changes when you look at familiar information as the chair. Preparation does not require you to arrive with a change agenda.

This is particularly important if you are joining the board as chair. If you are stepping up from within, revisit familiar material with different questions: what does it tell you about board focus, decision quality, information flow and follow-through? If the chair transition followed tension, loss of confidence or a difficult succession process, pay attention to what the documents do not show: unresolved expectations, loyalties, habits or sensitivities that may affect how the board responds to change.

Across the 180 days, change is not the measure of a successful transition. Understand what is working, preserve it where appropriate and address the areas where clarification or change would help the board work better. Too much early change can unsettle relationships and make the real priorities harder to see.

WHAT TO UNDERSTAND	WHAT TO DO	WHAT GOOD PROGRESS LOOKS LIKE
The board's formal authority and responsibilities	Read the constitution, trust deed, legislation or founding documents.	You can explain what the board is responsible for.
Current priorities, risks and major decisions	Review strategy, current priorities, risk material and key financial reports.	You understand what the organisation is trying to achieve and what major issues are coming up.
How the board currently operates	Read recent board and committee papers and minutes.	You understand how agendas, papers, minutes and actions are managed.
The chair's role and authority	Review the board charter, committee terms of reference and delegations.	You know what the chair is expected to lead, approve or represent.
The chair-CEO context	Review CEO objectives, KPIs and the performance review cycle.	You understand the current state of the chair-CEO relationship and any relevant committee role.
Board effectiveness and succession context	Review any board evaluation, chair review, skills matrix or succession material.	You know where you need more context before making changes.
Previous chair context	Meet the outgoing chair, where appropriate and possible.	You understand where there may be sensitivities, unresolved issues or inherited expectations to manage carefully.

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First 30 days

Objective: listen, observe and build trust

The first month is about listening and observation. Even where change is needed, early action should come from understanding how the board works and how you now need to lead it.

Reflection: *What is working well, what needs attention and what should wait until I understand it better?*

A first-time chair stepping up from within the board may need to test assumptions formed as a director. Familiarity helps, but it can also make established patterns harder to see. A first-time chair joining the board will need to build trust while learning how the board and organisation work.

Where the relationship with the previous chair was close, contested or difficult, understand the dynamics before deciding what should be preserved or reset. The point is not to reopen old issues, but to know what may affect trust, expectations and how the board responds to change.

WHAT TO UNDERSTAND	WHAT TO DO	WHAT GOOD PROGRESS LOOKS LIKE
What directors value and what concerns them	Meet each director individually.	You have heard different perspectives on board effectiveness.
The CEO's expectations and current pressures	Meet the CEO in your capacity as chair.	The CEO understands your early approach.
Committee priorities and pressure points	Meet the deputy chair and committee chairs.	You understand where committee work supports or affects board focus.
Board process and support	Meet governance support.	You understand how agendas, papers, minutes and actions work in practice.
Board agenda and meeting cycle	Shape the next board agenda with the CEO and governance support, focusing board time on the matters that most need its attention.	You understand how the agenda is developed and whether board time is well focused.
Current board strengths and possible changes	Ask directors what they value about how the board currently works, and what they think needs attention.	You can identify early strengths and possible pressure points.
How the board works in the room	Observe how discussion, challenge and decision-making work in practice.	You know which issues need attention now and which need more observation.
Inherited expectations or habits	Ask which expectations or habits from the previous chair's approach need to be understood before deciding whether to preserve or reset them.	You have not rushed into unnecessary change or simply continued previous habits by default.

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First 90 days

Objective: clarify how the board will work

By 90 days, begin moving from listening to clarifying expectations about how the board will work. This does not mean a major reset or change for its own sake. Focus on how the board will use its time, how directors are expected to contribute and how the chair and CEO will work together. Where the chair has inherited established habits, explain why any reset is needed and how it will help the board work better, not as a matter of personal preference or criticism of the previous chair.

***Reflection:** What expectations have I clarified and what still needs to be made explicit?*

WHAT TO UNDERSTAND	WHAT TO DO	WHAT GOOD PROGRESS LOOKS LIKE
Whether agendas focus on the matters that need board attention	Clarify how agendas will be developed and how directors can raise items.	Agendas better support the board's work.
Whether papers support good decisions	Review whether papers are concise, clear and useful for decision-making.	Papers are improving in focus, clarity and usefulness.
Director expectations	Set expectations for preparation, contribution, confidentiality and conduct.	Directors understand how you intend to chair meetings.
Chair-CEO boundaries	Confirm the chair-CEO meeting pattern, expectations and boundaries.	The CEO understands what should come to the chair, board or committee.
Board-only time and follow-through	Confirm the use of board-only time and how decisions, actions and accountabilities will be recorded and followed up.	Decisions, actions and accountabilities are clearer.
Delegations and reserved matters	Check whether delegations and matters reserved for the board are clear.	The board and CEO have greater clarity about where authority sits.
Whether a targeted reset is needed	Identify any targeted reset needed in board process, papers, expectations or inherited ways of working. Limit change to areas where there is a clear benefit for how the board works.	Any changes are explained as board-effectiveness improvements, not personal preferences of the new chair or criticism of the previous chair.
Whether the board needs a structured effectiveness discussion	Consider whether a board evaluation or structured board effectiveness discussion is needed to create shared ownership of any changes.	Contribution and challenge are becoming more constructive and better distributed.

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First 180 days

Objective: agree priorities for ongoing board effectiveness

By six months, the chair should have a clearer view of the board's strengths, risks and where it could improve. The board can now agree what should be preserved, strengthened or changed.

***Reflection:** What has the board agreed to preserve, reset or strengthen?*

The chair should not be the sole owner of change. Where improvement is needed, board evaluation or a structured board effectiveness conversation can help create collective ownership, especially after a difficult chair transition or where longstanding habits need to shift.

WHAT TO UNDERSTAND	WHAT TO DO	WHAT GOOD PROGRESS LOOKS LIKE
Whether the board is spending time on the right matters	Review whether the board workplan supports strategic priorities.	The board has a shared view of what is working and what needs to improve.
Whether committees are adding value	Check whether committees are adding value and reporting effectively.	Committee work is better connected to board priorities.
CEO performance and accountability	Review progress against CEO objectives and KPIs.	The CEO relationship is clear, constructive and within agreed boundaries.
CEO succession and continuity	Consider whether CEO succession or emergency cover needs attention.	The board has a clearer view of CEO continuity risk.
Board capability and succession	Review board capability, composition and succession needs.	The board has clarity about future capability and leadership needs.
Chair effectiveness	Seek feedback on your chairing from the deputy chair, committee chairs or selected directors.	You have feedback on your own chairing and know where to keep developing.
Whether any early resets are helping	Check whether any early resets have improved board focus, papers, discussion or follow-through.	The board has clarity about what will be sustained, what will be reset and what will be reviewed again.
Shared ownership of improvement	Agree a small number of board-owned improvement priorities.	The board has agreed the priorities and how they will be followed up.
What you need to sustain your own effectiveness	Review your workload, boundaries, leave and cover arrangements, peer or mentor support, feedback and development needs.	You have a realistic plan for your workload, support and development.

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180-day reflection

At the end of six months, take time to reflect on the transition so far, what the board needs next and what you need as chair.

Reflection questions

What has changed in how I see the chair role compared with being a director?

What have I learned about this board that I did not understand at the start?

What have I helped clarify, improve or reset?

Where have I moved too quickly, too slowly or without enough board ownership?

What does the board need from me over the next six months?

What support, feedback or development do I need to sustain my chair effectiveness?

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Chair wellbeing and development plan

The chair role can demand significant time, emotional labour and judgement, as well as periods of isolation. Looking after your wellbeing and continuing your development help sustain you as an effective chair.

Use this plan to identify the practical arrangements, relationships and development you need. Discuss relevant aspects with the deputy chair or another appropriate board member and revisit the plan after six months and at least annually.

Capacity and boundaries

Be realistic about the full demands of the role, including preparation, stakeholder relationships, work between meetings and unexpected issues. Clarify when and how you can be contacted, what belongs with management and how chair responsibilities will be covered during leave or periods of unavailability.

- What time does the role actually require, including preparation, stakeholder work and unexpected issues?
- What boundaries do I need around access, availability and operational involvement?
- When will I take leave and who will provide chair cover?

Support

The chair should not have to work through every issue alone. The deputy chair and committee chairs can provide board context; an experienced chair mentor or peer can offer confidential challenge; and legal, employment, financial or other specialist advice may be needed for particular matters. A useful mentor understands governance, respects confidentiality and is willing to challenge rather than simply reassure.

- Who can provide confidential, independent challenge?
- What role can the deputy chair and committee chairs appropriately play?
- Which matters require specialist rather than informal advice?

Feedback

Chairs can receive less candid feedback than other directors because people may be reluctant to challenge the person leading the board. Create more than one route for feedback and distinguish informal check-ins from a periodic, board-owned review of chair performance.

- Who will give me direct feedback on my chairing?
- How will the board formally review chair effectiveness?

Development

Chair development should be based on the capability the role and board context require, rather than a fixed percentage of time. Consider both governance knowledge and the practical skills of chairing: facilitation, judgement, constructive challenge, culture, stakeholder relationships, crisis leadership and working effectively with people whose perspectives or experiences differ from your own.

- What aspects of chairing are new to me?
- Which one or two development priorities matter most over the next 12 months?
- What practical experience, learning or support will address them?

Personal sustainability

Consider the habits and relationships that help you maintain connection, physical and mental health, perspective, learning and a sense of contribution outside the immediate pressures of the role.

- How will I stay connected to people who support perspective and wellbeing?
- What physical activity or routines help me manage pressure?
- How will I notice when my energy or reactions are affecting the role?
- What will I do, and who will I approach, if the pressure becomes difficult to manage?

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My priorities for the next 12 months

One boundary or capacity arrangement I will put in place:

One person or source of support I will engage:

One way I will seek feedback:

One chair development priority:

One practice that will support my wellbeing:

Date I will review this plan:

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