

# Onboarding a New Executive Director

Before Start Date	Person Responsible	Due Date
Send welcome letter and small gift from staff and board		
Send packet with benefit enrollment materials with instructions, due dates, employee handbook, etc		
Send packet of Org. reading material, such as organization assessment, bylaws, staff handbook, etc		
Send memo to full board and staff announcing selection and plan for start date and activities		
Send detailed letter to full board and staff with more specifics		
Prepare external announcement		
Send out external announcement in email newsletter		
Post external announcement on Org. website		
Send external announcement/press release to consultant and TSNE		
Send external announcement/ news release to media		
Send external announcement to key constituents, such as major donors, volunteers, etc		
Meet with office staff members one-on-one		

Facilities and Operations	Person Responsible	Due Date
Prepare office workspace		
Make keys or provide facilities entrance information		
Secure parking arrangements if applicable		
Set up email address		
Purchase laptop computer and cell phone		
Set up mailbox		
Update Facebook and social media		
Update phone info sheet		
Update Database access		
Make business cards		
Add to "about us" section on website with write up, photo, and contact info		
Add to office email list		
Create account on fileserver		

Migrate outgoing ED or Interim Executive Director's (IED) files to New ED user folder		
Orient to lock-up and alarm system		
Update telephone auto-attendant recording		
Make copies of tax-exempt forms		
Timesheet training		
Orientation on safety		
Review reimbursements, petty cash, and credit cards policies		
Phone, fax, email training		
Database and fileserver training		
Visit all facilities		
Visit offsite locations		
Orient to office procedures, door management		
<b>Transition and First Few Days</b>	<b>Person Responsible</b>	<b>Due Date</b>
Return signed offer letter		
Complete benefit enrollment forms and I-9		

Make plans for a memorable/welcoming first day, such as a staff lunch		
Meet with outgoing ED or IED		
Plan for new ED's 1st staff meeting: prep for what to expect, and plan any introductory activity		
Plan meeting with event staff, volunteers, interns, or contract employees		
Establish expectations and routine in regards to reporting to board, setting meeting agendas, board/staff interface, etc. Identify training and resource needs for ED.		
Orient to Org. history, mission statement, guiding principles, elevator speech/how to talk about Org.		
<b>Board Activities</b>	<b>Person Responsible</b>	<b>Due Date</b>
Schedule one-on-one meeting with Board Chair. Begin to establish norms, meeting expectations. May include consultant for support.		
Schedule first Executive Committee meeting with ED. Begin to establish norms, meeting expectations. May include consultant for support.		
Make plans for a memorable/welcoming first board meeting		
Schedule one-on-one meeting with every board member		
Executive Committee drafts first year goals and expectations 3 months, 6 months, and 12 months and meets with ED to finalize. May include consultant for support.		
<b>External Stakeholders</b>	<b>Person Responsible</b>	<b>Due Date</b>
Plan and schedule welcome reception		

Invite key constituents, donors, volunteers, community partners, etc to welcome reception	
Plan and schedule introductions to key constituents, volunteers, partner organizations, etc	
Assemble calendar of board meetings, events, activities	
<b>Administration and Finance</b>	
Schedule meeting with finance and budget management resources	
Review external policies and procedures, such as payroll, budget, quickbooks, etc	
Add ED as check signer to bank accounts	
<b>Fundraising and/or Membership Development</b>	
Work with fundraising team to determine top priorities for the next 3 months, 6 months, and 12 months	
Connect ED to grants team to offer support during transition	
<b>Strategic Planning</b>	
Plan full day strategic planning retreat with staff and board for ___ months out	
Determine top organizational priorities for the next 3 months, 6 months, and 12 months	
<b>Programs</b>	
Meet with all program staff members	

