



## **EXECUTIVE ONBOARD CHECKLIST**

### **In Advance**

- ☐ Complete all hiring and benefits paperwork.
- ☐ Email board, staff, security and key stakeholders announcing new executive hire with start date, responsibilities, bio and/or contact data.
- ☐ Set-up calendar with all regularly scheduled meetings and key briefings for the first two-weeks; make sure that any after hours or weekend events are reserved asap.
- ☐ Create a welcome package with background docs, directories, videos, and organization swag.
- ☐ Arrange for phone/email/calendar/timesheet/IT access and office with essential phone/computer/IT/programs/files to be transferred; update directories and e-list accordingly.
- ☐ Plan initial assignments for the first month: i.e., prep for a board meeting, receive training, interview staff job candidates, etc.
- ☐ Assign/orient a 'go to' mentor/trainer/peer, and arrange lunch with ED/Board Chair/Other and direct reports during the first week.

### **First Week**

- ☐ Have the mentor/trainer/peer be available to provide a tour, make staff introductions and take the new hire out to lunch on the first day.
- ☐ Arrange to provide IT assistance to set-up security, voicemail, email, computer/IT, calendar, network/filing, and/or get database access.
- ☐ Have the Executive Director, Board Chair and/or other department directors or stakeholders provide an overview of the organization, explain programs, policies, financials, and procedures - leaving time for Q&As.
- ☐ Have direct report(s) present a summary of their department's plan, priorities and reporting systems, discuss communications protocols and any key upcoming dates.
- ☐ Review initial assignments, first three-month priorities, performance and professional development goals and evaluation form, specifically outline key revenue, department and/or agency outcomes metrics.

### **First Month**

- ☐ Maintain regular meetings including presentations of agency's strategic, fundraising and communications plans, and provide 360 feedbacks from mentor/trainer, supervisor and staff.
- ☐ Have direct report(s) present their job descriptions and most recent job performance evaluations, specifically, outline their contribution from the previous year and goals for the coming year.
- ☐ Meet again to review organizational strategic and/or revenue goals and ED/DD's first assignments, personal performance and professional development goals.

### First Three Months

- ☐ Attend first board meeting and, if appropriate, start meeting with members individually, i.e., Executive Committee members, Nominating and/or Development/Major Gifts Committee Chairs, etc.
- ☐ Have trainings and/or meetings with related board committees and key consultants, i.e., management, accounting/ops, fundraising, database, PR/media, communications, and/or HR.
- ☐ Maintain regular meetings and provide 360 feedback from mentor/trainer, supervisor and staff, ensuring that they are meeting deadlines, prioritizing properly and developing healthy relationships with peers and others.
- ☐ Review first three-month priorities and assignments, performance and professional development goals and evaluation form, specifically outline key revenue, department and/or agency outcomes metrics.

### First Six Months

- ☐ Conduct a six-month performance review and discuss progress on performance goals and professional development goals for new hire and direct reports/department. Solicit 360 feedback from stakeholders in advance.
- ☐ Determine if training, support and/or coaching is required for success.
- ☐ Assess strengths and weaknesses related to organizational goals, mission and culture, consider department talent, working relationships and confidence/autonomy in assuming responsibilities.

### First Year

- ☐ Celebrate successes and recognition of employee's contributions.
- ☐ Continue providing regular informal 360 feedback; provide formal feedback during the annual review process; ask for suggestions for improving performance evaluations.
- ☐ Discuss employee's professional development goals and identify relevant learning opportunities.
- ☐ Conduct a formal one-year performance review with self-evaluation against original professional development goals, discussing progress on professional development, personal and agency goals. Solicit 360 feedback from direct reports, department directors and other stakeholders in advance.

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