

# **On Boarding the New Executive Director or Assistant Executive Director**

- Read the Association and/or Foundation by-laws, operating policies & procedures, personnel policies/ handbook.
- Read the organizations mission and values statements.
- Review the Committee, Division and Section purpose statements.
- Review the organizations financial position as soon as possible.
- Review the annual audit and management report. Schedule a meeting with the auditors to discuss the organizations finances.
  - Who has check signing authority?
  - Who has a corporate credit card?
  - Who is authorized to approve expenses, purchase orders or sign contracts?
  - Determine the amount of the Executive Director's spending authority before needing Board review and approval.
- Verify that the various local, state, and federal tax returns have been filed in a timely manner.
- Verify that the state and local charitable licenses have been filed for the calendar or fiscal year. (These licenses permit the organization to conduct fundraising activities)
- Determine if there is pending litigation involving the organization and meet with legal counsel to discuss.

- Review the organizations insurance coverages and meet with your broker to discuss coverages. Bring in consultants to review your policies.
- Meet with your IT staff and/or vendor to review hardware and software systems as well as security. Make security/firewall updates a priority. Develop a plan to update hardware and software systems.
- Develop a master calendar of important meeting dates, events, and deadline dates in order to help the Executive Director plan for the coming months.
- Schedule meetings with all employees of the organization over the first 60 days.
- Schedule to meet with the various Committee, Division and Section Chairs over the first 120 days.
- Determine who has the authority to speak for the organization and ensure that everyone (volunteers and staff) is aware of the who the official spokesperson is.
- Prepare a list of the phone numbers, contact information for Executive Committee, Board Members, and all staff. Have copies on your computer, iPad, Cell phone and hard copy available in your brief case and at home. **Emergencies happen. Be prepared!**
- Establish regular meeting dates and times with the Executive Committee to discuss issues and matters that have been discovered during the initial 3, 6, 9, and 12 months. Identify problem areas and make plans to address them.