



NONPROFIT EXECUTIVE ONBOARDING CHECKLIST

KNOWLEDGE BUILDING			
ACTION STEPS	Lead	Date	Status
1. Prepare "Legacy Plan"			
a. Describe organizational culture, values and vision			
b. Current opportunities and challenges			
c. Identify key collaboration partners			
d. Identify key donors			
e. Identify key community meetings to attend			
2. Make introductions to key partners and donors			
3. Prepare briefing for the new CEO			
a. Strategic Plan			
b. Organizational by-laws			
c. Organizational Chart			
d. Personnel policies			
e. Balance sheet			
f. Audit			
g. Job Descriptions			
h. Budgets for current and past two years			
i. Performance reviews (Leadership Team)			
j. Annual report			
k. List of funders with contact information			

COMMUNICATIONS

ACTION STEPS	Lead	Date	Status
1. Written			
a. Staff			
b. Volunteers			
c. Key Donors			
d. Collaborative Partners			
e. Community Leaders			
f. Press			
2. Meetings			
a. All staff			
b. Individual meetings with leadership team			
c. Individual meetings with board members			
d. Major Donors			
e. Foundation/Corporation Donors			

MISC.

ACTION STEPS	Lead	Date	Status
1. Set up email			
2. Business Cards			
3. Staff Directory			
4. Board List			
5. Human Resources Paperwork			

TRANSITION TEAM			
ACTION STEPS	Lead	Date	Status
1. Establish Transition Team to guide and support new CEO			
2. Transition Team			
a. Clarify priorities			
b. Set leadership agenda <ul style="list-style-type: none"> i. Establish clear and specific objectives to assess performance (one-, three-, six- and 12-month goals) 			
c. Ongoing support for new CEO. Important to ask: <ul style="list-style-type: none"> i. What information do you need from the board to be able to do the best job you can? ii. How can we work best to develop a trusting relationship? 			
EXIT INTERVIEW*			
ACTION STEPS	Lead	Date	Status
1. Current CEO Exit Interview <ul style="list-style-type: none"> a. What traditions are most important to keep? b. Are there any staffing issues we should be aware of? c. How could the board be more supportive? d. What ideas do you have to improve the organization? <ul style="list-style-type: none"> i. How would you complete this sentence... “I don’t know why (name of organization) doesn’t just _____.” 			

* This is not related to onboarding, but I thought it might be helpful.

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