Sample CEO Orientation/On Boarding Process

* Meet with Key Staff Individually (including these and any other manager or director level roles)
  + Operations Director/COO / Shelter Manager
  + Administrative Services Manager and/or HR, Bookkeeping, etc.
  + Communications, Marketing and Events Manager(s)
  + Development Manager
  + Animal Care Managers
  + Adoptions Manager
  + Programs or Outreach Managers (including Volunteer, Foster Program, etc)
  + Pet Resource/Help Desk/Managed Admissions/Intake Manager
  + Field Services Manager
  + Each veterinarian, individually
  + Clinic Manager
  + Maintenance and Janitorial Manager
* Documents to Review (order does not indicate importance):
* Organization chart
* Policies, procedures, SOPs
* Annual Impact Reports
* Current Financials
* Audited Financials
* Form 990
* Board member agreements and on boarding package for board members
* Employee manual, on boarding information/training
* Organization’s bylaws
* Contracts and Agreements
* Recent Strategic Plans
* Current Mission and Goals
* Animal Statistics
* Recent/Last assessment report
* List/description of current programs
* Most recent year’s fundraising and promotional materials
* Meet with Stakeholders (Staff/BOD/Volunteers/Donors)
  + All staff as whole group in each location(maybe couple sessions to accommodate different schedules)
  + Citizen advisory group (if exists)
  + Volunteers as a whole group
  + Key donors, individuals and perhaps a focus group or reception for donors
  + Lunch meeting with Board Chair and/or President
* Meet with other Animal Welfare Leadership
  + Animal Services OR Humane Society/SPCA Director
  + Leadership of any active or potentially active rescue groups
  + Other directors of similar agencies in the state
  + Plan calls with all major foundation/grant funders
  + Community Foundation
* Meet with Public Officials
  + County commissioners or city council members(each of them individually)
  + Mayors of major cities
  + Lobbyist, if have one
  + State legislators
* Meet with Key Partners/Contacts
  + Media (print, TV, etc.)
  + Businesses that are substantial partners
  + Key vendors (over time) IT, Health insurance, Liability insurance, Manager of any investment accounts