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