Creating a Plan for Your Organization’s Expansion of Services
or New Facility/Shelter
Organization Name, Project, Planning Timeline

This document can be helpful if you are planning an expansion of your program and services OR if you are planning a new facility.

You can create your own customized plan by selecting the tasks from the list provided below that apply to your organization and filling in the table directly below. Note that not all listed tasks may apply to your group and there may be others that you need to add for your specific project.

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**TASKS by Area of Responsibility Initial Draft**

**Facility**
- Finalize renovation plan
- Schedule work and sub-contractors
- Visit the facility to observe construction progress at least weekly
- Order/install shelter equipment
- Schedule inspections as required
- Design/order signage
- Choose/install phone system and IT system
Administration

● General Management
  ○ Schedule routine meetings
  ○ Determine initial hours of operation
  ○ Establish review and approval process for documents

● Finance
  ○ Develop a budget for construction
  ○ Develop an operational budget – one-time expenses to open facility and ongoing expenses
  ○ Hire bookkeeper or work with current bookkeeper
    ▪ Review Chart of Accounts for any needed sheltering related additions
  ○ Develop donation and fee payment tracking system
  ○ Develop donation controls process/policy

● Human Resource
  ○ Determine employee benefits:
    ▪ Health Insurance – if to be offered
    ▪ Worker’s compensation insurance – if needed
    ▪ Unemployment insurance – if needed
  ○ Create an employee handbook
  ○ Identify payroll system, PTO request and time tracking system
  ○ Develop performance review process
  ○ Develop internal communications processes
  ○ Create safety policies/committee, including OSHA compliance
  ○ Ensure ADA compliance if more than 15 paid staffers
  ○ Develop staffing plan:
    ▪ Plan draft schedule based on planned hours of operation
    ▪ Identify paid positions
    ▪ Identify volunteer positions
    ▪ Write job descriptions
    ▪ Develop org chart
    ▪ Recruit and hire staff
    ▪ Create onboarding process, including new hire and termination of employment checklists
    ▪ Provide onboarding for new staff
    ▪ Train new staff and volunteers (safe/humane animal handling, stress reduction and enrichment for animals, customer service, animal care, adoptions, policies and processes, etc.)

● Governance
  ○ Create document Retention/Destruction policy
  ○ Create conflict of interest policy
  ○ Create whistleblower policy
  ○ Create finance policy, credit card policy

● Insurance/Security
  ○ Secure liability, property, D&O, umbrella policy – consult with insurance agent
  ○ Decide what security systems are needed at the facility
• IT
  o Purchase or seek donations computer hardware & software (including anti-virus protection)
  o Acquire internet service
• Local & state legal requirements
  o COVID related
  o Business license
  o Solicitation registration
  o Sales tax, etc.

Operations
• Develop supply list, order initial supplies, create inventory and re-order process
• Develop list of essential policies/processes needed (see separate draft list below)
• Define goals
• Define metrics
• Develop metrics tracking process
• Schedule review meetings (or incorporate into general meetings above)
• Create standards for inside facility signage

Marketing & Development
• Develop one-year marketing/development plan with assigned tasks
• Design and order business cards, name tags
• Design and order other collateral materials
• Update website
• Update social media
• Create internal fundraising plan (donation container, asks, signage)

Operational Policy and Procedure Documents List – Initial Draft
Discuss prior to development and note that this does not include all HR and other documents – focused on operations only.

Facility
• Facility and equipment maintenance checklist (includes things like checking dryer vent to prevent fires and changing filters, etc.)
• Routine cleaning protocols for facility and grounds

Vehicles (if any)
• Routine maintenance and registration schedule

Management
• Routine metrics reporting requirements/process (animal admissions, outcomes, etc.)
• Closing checklist (things to do before locking up at night)
• Phone list for team members and emergency contacts
• Phone, email, and customer service protocols

Animal Care
• Admissions/Intake policies and process
  o Vaccinations
  o Initial exam and chip scanning
  o Documentation in animal management software
• Adoption policies and process
• Customer service expectations
• Animal Flow plan through the facility and housing decision-making
• Cleaning protocols (cats, dogs, routine and end of care)
• Animal feeding protocols (cats, dogs, kittens, puppies)
• Identifying animals in need of vet care and follow up
• Euthanasia decision-making protocol
• Animal handling, stress reduction and enrichment protocols (work with Kelley Bollen, MC, CABC)
• Medical triage and emergency veterinary care process
• Prevention of disease transmission and zoonotic disease training

Volunteers
• Volunteer training process
• Volunteer forms, job descriptions, and waivers
• Foster care:
  o Training & resources
  o Animal tracking and follow up process

Marketing
• Training for staff and volunteers re photos, adoption promotions, etc.