**Executive Director/Senior Staff Lead**

[INSERT ORGANIZATION LOGO HERE]

**Onboarding Checklist**

|  |  |  |  |
| --- | --- | --- | --- |
| First Name |  | Last Name |  |

**One week prior**

**HR Department:**

[ ]  **Create Personnel Files**

Refer to Employee Checklist and Guidelines to create a personnel file and a CONFIDENTIAL personnel file for the Executive Director. Include all completed forms.

[ ]  **Letter of Employment**

Signed Letter of Employment to be filed in the Executive Director’s personnel file.

[ ]  **Company Announcement**

Board Chair to send a company-wide announcement to the staff [and cc board] introducing the new Executive Director; include their start date.

[ ]  **Assign Onboarding Leads**

Assign a board and staff member who are responsible for onboarding the new hire.

[ ]  **Contact New Executive Director**

Contact the new Executive Director before their start date with logistics about start time, office location, parking, etc. Also send HR forms (see below) for completion to add to personnel file.

[ ]  **Staff Appointment Form**

To be filed in the Executive Director’s personnel file.

[ ]  **Signed Acknowledgement of Employee Handbook**

Provide Executive Director with a copy of the Employee Handbook. Signed Acknowledgement of Employee Handbook to be filed in the Executive Director’s personnel file.

[ ]  **Confidentiality Agreement**

Signed Confidentiality Agreement to be filed in the Executive Director’s personnel file.

[ ]  **Conflict of Interest Declaration**

Signed Conflict of Interest Declaration to be filed in the Executive Director’s personnel file.

[ ]  **Direct Deposit Form**

To be filed in the Executive Director’s **confidential** personnel file.

[ ]  **Emergency Contact Information**

To be filed in the Executive Director’s personnel file.

[ ]  **Vaccination Record**

To be filed in the Executive Director’s personnel file, if applicable.

[ ]  **Certification and/or Training Records**

To be filed in the Executive Director’s personnel file, if applicable.

[ ]  **Workstation Set Up**

Set up Executive Director’s workstation (i.e. desk, office supplies, etc.). Ensure any handover documents are up to date.

[ ]  **Notify the Provincial Divisions Office**

Notify the Provincial Divisions Office of the new Executive Director and submit requests for the following:

* Email address
* Member account
* Access to other required central IT platforms

[ ]  **Computer Access**

Request or assign a computer and arrange for passwords and access to:

* Computer drives
* Email address
* Phone number
* Other communication devices, if applicable

[ ]  **Security System Access**

Arrange for a security system access card and keys.

[ ]  **Office Phone List**

Update office phone list with new Executive Director’s information; distribute to staff and board.

**First Day**

**Board:**

[ ]  **Introduction to Staff**

Arrange one-on-one meetings or an all staff meeting for an introduction of the Executive Director to the staff.

[ ]  **Organization Orientation**

Provide an orientation to the Executive Director using the **Document Checklist on pages 4-5**.

**HR Department:**

[ ]  **Equipment and Tools**

[ ]  Computer/Laptop [ ]  Phone [ ]  Cards/Keys [ ]  Shared Files

[ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  **Office Tour**

Provide a tour of the office including washrooms and emergency exits, as applicable.

[ ]  **Health and Safety Orientation**

Refer to Health & Safety Orientation Checklist, signed document to be filed in Executive Director’s personnel file.

[ ]  **Email and Phone Systems**

Assist Executive Director with setting up a voicemail message and email signature, as per requirements.

**First Week**

**Board:**

[ ]  **Performance Goals**

Develop suitable goal(s) for the probation period to include in the Performance Review - Probation Period.

[ ]  **Check-In Meeting**

Arrange a check-in meeting within the first week to address any issues, questions or concerns.

**HR Department:**

[ ]  **Meeting Invitations**

Provide calendar invitations to any upcoming meetings the Executive Director is expected to attend.

[ ]  **Update Website and Business Cards**

Update website with Executive Director’s name, position and bio. Order business cards, as required.

**First 1-3 Months**

**Board:**

[ ]  **Performance Review**

With the Executive Director, complete the Performance Review – Probation Period after their first 6 to 8 weeks of work, and again after their first 11 to 12 weeks (before their probationary period is complete).

[ ]  **Performance Review: 6 to 8 weeks**

[ ]  **Performance Review: 11 to 12 weeks**

[ ]  **360 Performance Review: Number of weeks TBD by Board**

**HR Department:**

[ ]  **Group Benefits Registration**

If applicable, register Executive Director to Group Health and Welfare Benefits Plan, or have Executive Director complete the Benefits Opt-Out Waiver.

**Executive Director Document Checklist**

The following is a list of documents that must be gathered to help an incoming Executive Director become orientated with an understanding of the Division’s culture, policies and practices, and to contextualize the goals and objectives they are hired to implement and enact.

**Operations and Planning:**

[ ]  History, mission statement and values

[ ]  Strategic planning documents

[ ]  Communications plan

[ ]  Items needing immediate action

[ ]  Website and social media presence description

[ ]  Calendars, programming and events

[ ]  Computer Systems and networks; where to find documents

[ ]  Provincial Divisions Office resources and contracts

[ ]  History and current status of the Collaborative Services Committee, including members and Terms of Reference

**Staffing and HR Documents:**

[ ]  Organizational chart

[ ]  Human Resource policies, files, and related information

[ ]  Job descriptions for all staff

[ ]  Description of benefits, list of providers, policies, etc.

[ ]  Evaluation framework

[ ]  List of vendor contracts

[ ]  Status of current and potential stakeholder/partner relationships, agreements, and committees, including any Terms of Reference

**Facilities Documents:**

[ ]  Buildings and grounds descriptions and current pending issues

[ ]  Master plan and any accompanying documents

[ ]  If needed, floor plans, architectural drawing and facilities reports

[ ]  IT systems, network support and needs

[ ]  Emergency systems, safeguards

**Board of Directors:**

[ ]  History and current status of the board and individual board members

[ ]  Board meeting structure, process, and schedule

[ ]  Past minutes and agendas (past 12 to 24 months)

[ ]  Constitution, bylaws, and governance policies

[ ]  Document of Intent

[ ]  Meeting dates

[ ]  Board’s expectations of the Executive Director

**Financial Documents:**

[ ]  Current finances, budget; immediate needs and end-of-year goals

[ ]  3 to 5 years of past budgets

[ ]  Bookkeeping and payment process

[ ]  Appropriate bank access (e.g. names of bank accounts, investment accounts, debts, line of credit accounts, restricted funds, limitations and issues)

[ ]  Additional Arrangements and Notes

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|  |  |  |  |
| --- | --- | --- | --- |
| Signature(Executive Director) |  | Date |  |
| Signature(Board Member) |  | Date |  |
| Signature(HR Department) |  | Date |  |