

New Executive Director Checklist

GENERAL

- Most recent annual report
- Strategic Plan
- Staff contact sheet
- Board roster and contact information
- Board policies and procedures
- Technology inventory
- Organizational conflict of interest policy
- Bylaws
- IRS determination letter

HUMAN RESOURCES

- Personnel handbook
- All job or position descriptions (including your own)
- Employee orientation manual and process

FINANCIAL

- Current fiscal year budget
- Current statement of financial position and activities
- Recent audit information (if applicable)

FUNDRAISING

- Funding matrix (with funder name, amounts, and report deadlines)
- Fundraising plan
- Recent proposal(s)