**Executive Director – Office Onboarding Checklist**

**Below are tasks to be completed in preparation for the new executive director’s arrival. Please review, edit, and add to the list as you see fit. We want the ED’s first day to feel like she’s always been here! No Surprises!**

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| **Task** | **Resp** | **Notes** |
| Email and calendar setup | Cedric | Done: joy@culturalcouncil[.org](mailto:jyoung@culturalcouncil.org) |
| Make sure staff calendars are shared with Joy and vice versa |  |  |
| Business cards and name tag ordered | Chelsey/Cedric/Amy |  |
| Clean and prepare office | Cedric | In progress (incl painting) |
| First Day Flowers  Tea bags - honey, lemon, ginger and MORE COFFEE MUG | Amy |  |
| Desk phone setup / agency phone directory message updated | Cedric | Will be installed when the computer arrives |
| Laptop/desktop, network, and printer acquired and set up | Cedric | ETA 2/1 |
| Add name to Distribution Lists for staff, board, all CSG email groups plus create Foundant account, etc | Chelsey/Amy |  |
| Update website with Photo, Info (take a new photo when she’s here?) | Jihan |  |
| Issue Joy company credit card | Cedric |  |
| TU Badge and key | Cedric | Done |
| First Day - Staff Lunch | Amy/Chels | Let’s agree ahead of time if we can all make time to do this and settle on a time/place. We all tend to bring lunch, eat at our desks or grab something on the fly. We can talk about this with Joy so she’s not caught off-guard on her first day about where to go or what to do for lunch. |
| Schedule meeting with VALIC representative so Joy can set up her 403b retirement account with CCGJ | Cedric | The rest of the staff would likely benefit from being able to meet individally with VALIC rep while she is in the office |
| Schedule Media Tour | Jihan et al | ARBUS and J Magazine underway. |
| Schedule key stakeholder meetings | Chelsey, Ann, Amy | Include elected officials (City and State soon) |
| Schedule Board Member one on ones | Chelsey |  |
| Schedule staff one-on-ones to help acclimate Joy. Include: dept. goals, timelines, job descriptions, outstanding items needing Joy’s attention, etc. | Each staff member | Find out Joy’s preference on length of time and any special scheduling notes |
| Add ESAL, Board Meetings, Vystar, what else, to her calendar. | Ann | Done: Board, ESAL, Vystar |
| Add everything in CCGJ Program Guide to her calendar (not listed above) | Jihan |  |
| Add Staff Meetings to Joy’s Calendar | Chelsey |  |
| Add some fun cultural events to her calendar so she’ll have some ideas of things to do on weekends early on | Amy/anyone | (i.e. RAM, Lantern Parade) |
| Add CSG process timeline and CSGP Committee dates to Joy’s calendar | Chelsey/Amy |  |
| Add APPC meetings to Joy’s Calendar - invite to attend Feb. 13 meeting - add to agenda | Ashley |  |
| Schedule CSG Level I Leaders | Chelsey |  |
| Ethics Training | Amy | Provide 2019 opportunities to attend |
| Sign Bank Paperwork | Cedric |  |
| Board approve new Corporate Resolution authorizing Joy to sign for agency for COJ-related documents (COJ Trust Fund grants and CSGP) | Amy/Ann/Chels | Include in February BOD meeting agenda |
| Review finance & employee policies with Joy | Cedric |  |
| Schedule Art Walk VIP Tent Visit | Chelsey |  |
| Schedule Tour of coRK and meets artists with studios there | Amy | Crystal Floyd offered to facilitate |
| Schedule Florida Theater Reception with CSG’s | Numa | Scheduled for Feb 10, 2019: Michael Bolton |
| December Press Conference | Jihan, Cedric | Done: December 20, 2019 - Success! |
| NonProfit Center CEO/Chair Retreat | Ann | Done: Monday, January 28, 2019 |
| Leadership Jax Summit Program - $3,500 – funding? |  |  |
| Identify City contacts and additional stakeholders, etc. working with APP | Christie, Ashley, Mason |  |
| Resumes for Joy from staff | Cedric |  |
| Update AFTA and other web sites with Joy’s information | Chelsey |  |
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