

# Table of Contents Template: Executive Director Handbook

This template can be adapted to your organization and used as a starting point to create a reference guide for newly engaged Executive Directors and seasoned veterans alike.

An Executive Director (ED) Handbook is a resource (printed or digital) that houses all of the information and policies that are important to both the smooth running of the organization and the ED's ability to accomplish their mandate. It can explain the organization's mission, vision and values, provide copies of essential policies, and outline responsibilities related to the role of ED; it is an excellent resource for onboarding and training.

It is important to review and update your Executive Director Handbook periodically to ensure it reflects any legislative, regulatory and internal policy changes that occur over time. The team at RDN can assist you in creating your Handbook so that it corresponds to your organization's needs and realities.

Many of the components of an ED handbook are policies and other files, to avoid recreating your documents in order to include them, consider using Adobe Acrobat to combine existing files into one master PDF document (RDN's staff can assist with this, please reach out if you need a hand!).

# TABLE OF CONTENTS

01

## General Information

- Mission, Vision, Values
- By-laws
- Strategic Plan
- Most recent Annual Report
- Most recent Financial Statements
- Organizational Chart

02

## Human Resources Documents

- Hiring templates
  - Letter of employment
  - Pay requisition
- Current job descriptions
- Staff evaluation templates
- Current staff contact list

03

## Board of Directors Information

- BOD Handbook
- Critical path for onboarding members
- Calendar of meetings for the current year
- Current BOD contact list

04

## Policies and Procedures

- Conflict of Interest policy
- Social Media policy
- Staff Handbook
- Operations Manual
- Travel Policy
- Code of Ethics

05

## Financial and Project Info

- Projected revenue
- Current Operating Statement
- Salaries, Project and Core spreadsheet (RDN can supply template)
- Reporting deadlines for the current year/current funding (list)
- Project fact sheets for current projects
- Funding advisors contact list

06

## Passwords and Codes

- Account passwords
  - Banking
    - Credit card
  - Government
    - Registraire des Entreprises
    - Rev QC
    - CRA / GCOS
  - Survey Monkey
  - Zoom
  - Microsoft / Google
  - Canva
- Codes
  - Alarm
  - Digital keys