

Onboarding Checklist

Please note: This is a sample onboarding checklist and is intended for study and educational purposes. It is based on an actual checklist to onboard a Director of Development at a youth services nonprofit based in New York City. Users may adapt this instrument to their own needs but it is not recommended to use "as-is" given the unique needs of each organization and position.

"DoD" = Director of Development.

Directions: This checklist is designed to assist with the organization's onboarding process. Onboarding is a long-term process that begins before the DoD's start date and continues for several months. This checklist is organized chronologically and helps the staff prepare for and facilitate the arrival of the DoD. Once the DoD starts, s/he can work together with staff to complete the checklist who may add additional relevant activities.

Pre-Arrival

	<u>Who Initiates</u>
<input type="checkbox"/> Establish semi-private (if possible) office space: neat, clean, and supplied	Office Manager
<input type="checkbox"/> Confirm offer e-mail sent to DoD	Executive Director
<input type="checkbox"/> Call to officially welcome the DoD after confirmation of acceptance	Executive Director
<input type="checkbox"/> Set up and test computer, phone, log in password, office supplies	Office Manager
<input type="checkbox"/> Set up and test phone line extension	Office Manager
<input type="checkbox"/> Send an announcement via email to the staff announcing the DoD and start date	Executive Director
<input type="checkbox"/> Confirm how the DoD would like name to appear on business cards	Office Manager
<input type="checkbox"/> Order business cards	Office Manager
<input type="checkbox"/> E-mail address is created, activated, and tested	Office Manager

Arrival

<u>1st Day</u>	<u>Who Initiates</u>
<input type="checkbox"/> See Director of Finance to complete W-4, I-9, completes Employment Application, and receive Staff Handbook and benefits packet	DoD
<input type="checkbox"/> Remind DoD to provide information necessary to initiate benefits package	Director of Finance
<input type="checkbox"/> Introduce to co-workers	Executive Director
<input type="checkbox"/> Provide office key	Office Manager
<input type="checkbox"/> Discuss procedures for scheduling time off and unexpected absences	Director of Finance
<input type="checkbox"/> Review work and pay schedule	Director of Finance
<input type="checkbox"/> Go over phones, fax, copier, office supplies	Office Manager
<input type="checkbox"/> Provide computer orientation at desk (computer sign-in, shared drives on network, email, specialized software, etc.)	Office Manager
<input type="checkbox"/> Give an office tour (place to hang coat, washroom, water fountain, vending machine, staff lounge, refrigerator, emergency exit, etc.)	Office Manager
<input type="checkbox"/> Arrange a welcome lunch for DoD	Office Manager

Within 1st Week

- Review and discuss DoD's goals, objectives, and priorities Executive Director
- Sign-up for direct deposit if applicable DoD
- Sign-up for benefits programs DoD
- Review job responsibilities, competencies, expectations, and discuss a process to agree on collaborative goals Executive Director
 - Discuss urgent development calendar priorities Executive Director
 - Schedule regular meetings to touch base with executive director DoD
- Review organizational mission, values, functions, policies and procedures, organization chart, and staff and board directory Executive Director

Within 2 Weeks

- Schedule regular meetings to coordinate with other staff DoD
- Meet with development staff to discuss: DoD
 - Current roles in development and with the development committee, if applicable DoD
 - Government contracts and calendar DoD
 - Other issues DoD
- Meet with Program Director to discuss: DoD
 - Current roles in development and with the development committee, if applicable DoD
 - Government contracts and calendar DoD
 - Other issues DoD
- Think about and assess role and responsibilities of the development committee DoD
- Overview of budget and finance procedures and policies Director of Finance

Within 1st Month

- Review and clarify performance objectives and expectations after the first month Executive Director
- Review, clarify, and assess role and responsibilities of development committee of the board DoD
- Arrange for a facilitated site visit for DoD Program Director

5th and 6th Month

- Review performance objectives and progress Executive Director
- Discuss professional development and training needs, if any Executive Director

Annual Performance Review

- Conduct annual performance review Executive Director
- Agree on goals and objectives for the coming year with DoD Executive Director