

New Hire Training

Use this checklist for any development new hire, regardless of their stage in their career. This is focused on getting them familiar with your organization in coordinated plan. This is focused on setting them up for long-term success.

Week 1

Task	Activity/ Plan
<input type="checkbox"/> Gov't paperwork	
<input type="checkbox"/> Organization paperwork	<ul style="list-style-type: none"> - Conflict of interests - Confidentiality agreement
<input type="checkbox"/> Facility/ Office Tour	
<input type="checkbox"/> Meet key staff	
<input type="checkbox"/> Review <ul style="list-style-type: none"> - Mission statement - History of the organization - Bi-laws - 	
<input type="checkbox"/> Discuss job description	<ul style="list-style-type: none"> - Review specific tasks - Review expected schedule
<input type="checkbox"/> Identify Development Plan	
<input type="checkbox"/> Research history of activities	
<input type="checkbox"/> Receive access to necessary systems and facilities	
<input type="checkbox"/> Begin learning Donor Management System	
<input type="checkbox"/> Begin learning Systems and Protocols for programs/ Client impact	
<input type="checkbox"/> Begin setting appointments with Volunteer Leadership	

Week 2

	Task	Activity/ Plan
<input type="checkbox"/>	Set at least 2 appointments with volunteer leadership	
<input type="checkbox"/>	Begin pulling reports from Donor Management System	Any reports like top donors.
<input type="checkbox"/>	Identify opportunities to observe programs that you are raising money for.	Spend at least 2 hours observing. Collect your own stories to speak with donors
<input type="checkbox"/>	Spend 1 hour with online education	Participate in a webinar for your Donor Management, read a few blogs

Week 3

	Task	Activity/ Plan
<input type="checkbox"/>	Role-play interactions with volunteer leadership and top donors	Interact with someone that can provide intelligence on volunteers and donors and interested in your success (Like the person that hired you)
<input type="checkbox"/>	Set at least 2 appointments with volunteer leadership	
<input type="checkbox"/>	Pull report on top donors and discuss with staff	
<input type="checkbox"/>	Make at least 2 appointments with top and/or long-term donors	
<input type="checkbox"/>	Identify opportunities to observe programs that you are raising money for.	Spend at least 2 hours observing. Collect your own stories to speak with donors
<input type="checkbox"/>	Spend 1 hour with online education	Participate in a webinar for your Donor Management, read a few blogs

Week 4

	Task	Activity/ Plan
<input type="checkbox"/>	Continue Role-play (practice) interactions with top donors and volunteers	
<input type="checkbox"/>	Set at least 2 appointments with volunteer leadership	
<input type="checkbox"/>	Make at least 2 appointments with top and/or long-term donors	
<input type="checkbox"/>	Pull reports on monthly contributions for the previous 12 months	
<input type="checkbox"/>	Identify opportunities to observe programs that you are raising money for.	Spend at least 2 hours observing. Collect your own stories to speak with donors
<input type="checkbox"/>	Spend 1 hour with online education	Participate in a webinar for your Donor Management, read a few blogs

Week 5

	Task	Activity/ Plan
<input type="checkbox"/>	From your monthly reports set goals for your first year	Use Specific Measurable Attainable Relevant Time-bound
<input type="checkbox"/>	Continue Role-play (practice) interactions with top donors and volunteers	
<input type="checkbox"/>	Set at least 2 appointments with volunteer leadership	
<input type="checkbox"/>	Make at least 2 appointments with top and/or long-term donors	
<input type="checkbox"/>	Set appointment with other departments and ask for candor and feedback	Find the brightspots and opportunities to work positively together.
<input type="checkbox"/>	Identify opportunities to observe programs that you are raising money for.	
<input type="checkbox"/>	Spend 1 hour with online education	

Week 6

	Task	Activity/ Plan
<input type="checkbox"/>	Set additional goals beyond funds raised (2 or 3) for growth and development	No more than 5 total goals
<input type="checkbox"/>	Include action steps	Action steps are how you plan to achieve the goals you have set forth
<input type="checkbox"/>	Sign-up for a Class or professional organization meeting like the Assoc of Fundraising Professionals.	You can find local AFP chapters at https://afpglobal.org/chapters . The value of these classes is in as much of the people you will have to meet as much of the information they provide.
<input type="checkbox"/>	Continue to set appointments for the future with donors and leadership. Attempt to have 5 or more face to face activities each week	
<input type="checkbox"/>	Share your goals	Create accountability for yourself by sharing your goals with colleagues and ask for their help in achieving them.