

NEW EMPLOYEE ORIENTATION CHECKLIST



If your staff directory is not painfully out of date, you're not "cold". If you do a bagel breakfast to welcome your newest employee, you are getting "warmer." If the Executive Director stops by for 5 minutes and says welcome and talks about what makes this organization unique and special, you are very, very warm.

Here are some other things to consider when building a new employee orientation program. Yes, I said *program*. Do not roll your eyes. An orientation is key to productivity and retention and helps turn a nonprofit job into a vocation.

A WEEK BEFORE ARRIVAL

Ask yourself a simple question. *What would be really helpful for your new employee to read, watch, absorb PRIOR to day 1 that could offer her/him valuable context?*

Not just talking about an employee manual here folks. Assuming you have one.

Create a binder that everyone gets sent (electronically if possible) a week before their start date. It should be about the organization and not about their position.

Try to pull it together in such a way that all docs are in an e-folder or binder or something that sends a message that you are organized and professional (even if you don't always feel that way).

Items to include:

- Annual Report
- Current Year Budget
- An org chart (up to date please)
- Staff Bio Book (invest in creating this – create one at your next staff retreat as an icebreaker and use those)
- A link to a video of a speech by your Executive Director
- A document (a speech for ex) or a video that tells the story of the history of your organization
- A copy of a SUMMARY of the current strategic plan
- A copy of the new employee's job description and their supervisor's job description as well
- Is there anything that you can include that offers external validation of your work from someone outside the organization?

A FEW DAYS BEFORE ARRIVAL

Office / Cubicle Set Up

It is the responsibility of the supervisor to make sure that all systems are go for the new arrival. Do you really want to sit with your new hire and complain about the HR person (if you have one)????

Think about what YOU would want to be able to do on your first day of work? Please don't do this on the first day. It sends a bad message - *'oh right, I almost forgot you were coming.'*

So be sure they have the basics: can send and receive email, make a phone call, write something down, staple something, call a colleague and hit the restroom.

Set Up Intro Meetings for Days 1-5

Give this some thought. Who should your new staffer meet with (internal AND external) during week #1. Think about what ORDER in which you want the meetings. And make the time to set them up. I am well aware that many of you do not have assistants and /or HR folks. If you want your new staffer to hit the ground running, fill their tanks.

Oh, and don't start scheduling until midday on Day 1. You are the main attraction on Day 1.

Clear Your Own Calendar for Day 1

Please do not send a message on the first day that you are too busy for your new employee. That's just poor form.

AN AGENDA FOR A GREAT EMPLOYEE ORIENTATION

- Welcome Breakfast
 - Make it standard practice and ask the E.D. to be pushy about attendance.
 - Include a program element to it that allows the new employee to get to know the staff, more than just by title. Do introductions and then pose a funny question or one that reveals the real culture of the organization (and the personality of the staffer concurrently)

- A Three Hour Session – Just You (The Boss) and the New Kid on the Block
 - *Thank you*
 - *It's all about you.* Your background and what you brought you to this org at this time in your life
 - *Review of readings.* Have a real discussion. What did your new staffer learn? What impressed her? What surprised her? If there were headlines YOU wanted her to take away from it, be sure to emphasize them.
 - *What is this place all about?* What makes this organization special and unique? What is the culture like? What are attributes are valued? What are the values of the organization (another reason you should have them). And please please please: keep it simple!!
 - *What Does Communications Look Like Here?* Don't gloss over this one. Talk about your expectations for clear communications, email etiquette, how quickly you expect emails and phone calls to be returned.
 - *How Will You and I Communicate?* What are your expectations? How often will you and I meet? Describe your working style. Talk about how you approach reading and responding to emails.
 - *Success in the first 30 days.* Start this discussion right away. Send a message that you want your new staffer to be successful. Begin a discussion with give and take to define what you want to be able to say was accomplished one month down the road. After the discussion, both of you should percolate and reconvene at the end of week 1 with a draft from your new staffer to discuss, review and finalize.

- Build in Some Time for New Staffer to Breathe.

- End of Day 1 Recap
 - Please touch base, even for 15 minutes at the end of Day 1. How did it go? Ask your new staffer for the headlines and thank them again for joining the team.

