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Onboarding Checklist for Managers

This resource contains a (non-comprehensive) list of common and recommended tasks for managers to consider as part of your new hire onboarding process. Please note that this resource does NOT contain action items associated with traditional HR functions and administrative tasks related to onboarding, such as setting up payroll, benefits, timesheets, etc.

	Task	Due date	Status	Helpers / Consulted	Notes
Before the first day					
<input checked="" type="checkbox"/>	Notify relevant colleagues in HR, admin, finance, tech, operations, and/or facilities departments about new hire and share any information needed to complete paperwork, set up benefits, set up accounts, secure equipment, etc.	4/1	Done	Dave, Addae, Tim	Confirm with Dave that 5/1 start date gives enough prep time for admin team
<input type="checkbox"/>	Send an email to all staff announcing new employee's start date and role. Encourage staff to reach out and welcome them before they start.	4/5	Not done		New hire's personal email is new. hire@mail.com
<input type="checkbox"/>	Make a list of meetings they should shadow or participate in and add them to your new hire's calendar. (Note: Make sure to give your colleagues a heads up! Depending on how long the list is, you might schedule just a handful of meetings for them, and have them own scheduling the rest once they arrive.)	4/15	In progress	Tim (on scheduling)	Make a list for Tim to add to calendar
<input type="checkbox"/>	Ask the new hire to schedule meetings with key stakeholders. Make sure to share the purpose and any relevant context and guidance for the meetings (e.g., to learn more about XYZ function at your organization)				
<input type="checkbox"/>	Fill out a role expectations worksheet for your new hire				
<input type="checkbox"/>	Brainstorm 30, 60, and 90-day goals				
<input type="checkbox"/>	Compile and share a schedule that outlines key meetings and tasks for their first 1-2 weeks				
<input type="checkbox"/>	Reflect on their strengths and development areas (based on what you know from the hiring process). Make a list of learning opportunities for the first 90 days. See the " Training & Development " section of our Onboarding Planning Toolkit				
<input type="checkbox"/>	Schedule your first few check-ins				
<input type="checkbox"/>	Arrange a welcome gift, such as flowers, a treat, or a card to arrive on or before their first day				
<input type="checkbox"/>	Arrange a welcome lunch for their first week				
During the first week					
<input type="checkbox"/>	Greet them, introduce them to co-workers, and familiarize them with the office. If remote, set up a welcome call (bonus: have coworkers drop into the Zoom at intervals to introduce themselves!)				
<input type="checkbox"/>	Send first-day welcome email				
<input type="checkbox"/>	Do your first check-in. Use it to get to know each other, review job description and expectations, review first week schedule of activities				
<input type="checkbox"/>	Provide overview of organizational context, which may include: mission, vision, values, history, equity statement, theory of change, organizational strategy, org chart, and organizational and department/team goals				
<input type="checkbox"/>	Provide overview of team context, which may include: team goals, team-specific values, key documents to reference, systems, platforms, and processes				
<input type="checkbox"/>	Share key documents (such as project plans, team meeting notes, brainstorm, etc.) with your new hire and offer suggestions on what to dig into when they have downtime in the first few weeks				
During the first month					
<input type="checkbox"/>	Discuss short-term goals (30, 60, 90 days) , and set a time for a 90-day discussion				
<input type="checkbox"/>	Assign first project/assignment and schedule a debrief				
<input type="checkbox"/>	Identify an opportunity (or more) for side-by-side work where they can observe you in action and schedule a debrief				
<input type="checkbox"/>	Ask for feedback on the onboarding process so far (can be done in the form of a survey or during a one-on-one)				
<input type="checkbox"/>	Schedule one or more check ins for "getting to know you" conversations. See the " getting to know each other " section of our Onboarding Planning Toolkit				
<input type="checkbox"/>	Ask the new hire to schedule meetings with key stakeholders. Make sure to share relevant context and guidance for the meetings (e.g., to learn about XYZ function of the organization, to get a sense of how you typically partner with a community organization, etc.)				
<input type="checkbox"/>	Check in on status of relationship-building and connection with colleagues and partners				