

# New Staff Preparation Checklist



## Responsibilities

Clearly communicate specific responsibilities to your new team member and give them an opportunity to ask questions.

Review:

- Job description
- Team communication expectations
- Preferred methods, styles, etc.
- Best practices

## Relationships

- Transition Connect:** If they are replacing someone, schedule time(s) for both team members to do a transition handoff and Q&A.
- Team Connects:**
  - Give visual orientation of Team Structure.
  - Calendar a First Week team coffee connect welcoming your new team member!
  - Calendar connects with specific team members as needed.
- Campus Connections:** Set up introductions between any Campus team members they will have regular in-person and email interaction with.
- Central Support Team Connections:** Make appropriate introductions either in person or by email with team members they will have regular interaction with.

## Rhythms

### 15Five

- 1-on-1's:** Send a recurring calendar invite for your weekly 1-on-1; give instructions on creating the agenda and how you will conduct the meeting with them.
- Weekly 15Five:** Communicate when you want them to submit their check-in and when you will review it.
- Reviews:**
  - 90-Day Review - Explain that they will receive a notification from HR to complete a 90-day review and that you will schedule a time to go over it with them.

### Meetings & Events

Send your new team member this [link](#) to add the Global Calendar to their calendar.

- Global:** Review expectations for attendance and serving of Infuse, Sisterhood, Diesel, Christmas, Easter, and Conference.
- Campus:** Review expectations for attendance and serving at any campus-specific events.
- Department:** Review any events your department is responsible for planning/executing and what the expectations are.
- Add new team member to any:
  - Team Meetings
  - Campus Meetings
  - Central Meetings
  - Staff MeetingsInvite them to sit with you and your team.

## Resources

### Additional Tools

In your first 1-on-1, talk through what additional tools they need:

- Role Specific Apps:** Request logins and explain how they will use them in their role. (i.e., Asana, Slack, Jira, etc.)
- File storage:** Share files from Google Drive, Shared Drive, or other file servers.
- Finance:** Provide credit card, budget codes, budget access, login information for subscriptions, Anybill expectations & workflow if needed.
- Kitchen:** Give orientation to the kitchen, coffee machine, and expectations on cleaning.

### Training

In your first 1-on-1, you will want to talk through any training they need:

- HR:** [Here](#) is a list of training HR enrolls them in. Please request any additional training (i.e., ADP, Any bill) they need ASAP.
- Department:** Identify training needed and confirm new team member has completed or is set up for necessary training.
- Campus:** Add to calendar any campus training your department will provide for the Dream Team.
- Central:** Add to calendar any Central training your department will provide for the Dream Team.