

SAMPLE ONBOARDING SCHEDULE



	PREPARE (1-4 WEEKS PRIOR TO START)	WELCOME AND ORIENTATION (FIRST 1-2 WEEKS)	CONNECT AND INTEGRATE (FIRST 1-3 MONTHS)
MANAGER	<ul style="list-style-type: none"> Request technology (hardware, software) Order supplies Identify seating location Communicate first day logistics Prepare desk and office Prepare welcome folder or binder Create schedule for first few weeks 	<ul style="list-style-type: none"> Announce hire to department, team, or area Explain role, responsibilities & expectations SparkPoint Orientation Give tour of local work environment(s) Introduce employee to co-workers and partners Introduce local IT systems, administrative & financial procedures Discuss communication norms Order business cards Connect with local United Way or other backbone to discuss specific training, getting connected to the network 	<ul style="list-style-type: none"> Discuss & set goals Confirm understanding of key department policies & procedures Perform 3-month check-in Quarterly or periodic check-in to provide and receive feedback
HR, FACILITIES, AND IT		<ul style="list-style-type: none"> HR paperwork and new hire policies IT systems How to find and request office supplies 	
EMPLOYEE		<ul style="list-style-type: none"> Learn policies and systems 	<ul style="list-style-type: none"> Meet with partners Set goals Attend relevant trainings (e.g. data system) Meet with peers from another SparkPoint Center Continued training through Association of Financial Counseling and Planning Education (AFCPE) or other programs