Perfecting the First 180 Days

Major Gift Officer Onboarding Toolkit

Advancement Forum

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

This toolkit is part of a suite of resources, detailed below, dedicated to assisting members in developing or maintaining a best-in-class talent management program. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the Advancement Forum to decide which practices are most relevant to your institution and to save implementation time with a clear agenda, tools, and templates.

The Professional Development Playbook

Targeting Skill-Building to Maximize Advancement Staff Performance

Best practices and tools for instilling accountability, diagnosing skill gaps, and deploying high-impact skill-building to realize untapped potential among fundraisers and set institutions apart in the talent war.

Making Meaning of Metrics

Leveraging Accountability and Analytics to Enhance Fundraiser Productivity

How to improve performance and accountability by measuring, tracking, and tailoring goals, and then linking them to evaluation, compensation, and the career ladder.

Competing for Talent

9 Strategies for Improving Major Gift Officer Recruitment

Best practices and tools for building long-term candidate pipelines, designing interview and hiring processes, and providing an onboarding program that accelerates productivity to put your institution ahead in an MGO search.

Gifted and Talented

What Makes a Top Fundraiser in the Age of Venture Philanthropy?

How to develop a new human capital strategy, and prescriptions for a new approach to fundraiser selection to enhance your MGO interview process.

Building Skills Through Video Replay and Group Feedback

Simulation-Based Coaching Toolkit for Fundraisers

Critical tools to plan and conduct a Simulation-Based Coaching Session aimed to improve frontline fundraiser performance.

Download these resources at **eab.com**

Executive Summary

The Importance of Onboarding

The success or failure of new MGOs is often determined within their first 90 days on the job. An institution's onboarding process can enable new hires to quickly adapt, learn, and see results. However, one-size-fits-all onboarding processes do not enable new hires to gain the skills they need to succeed. A recent survey found organizations with strong onboarding practices in place have 25% higher retention rates.[1] Updating onboarding procedures can:

- Help new hires gain skills and competencies needed for success, regardless of their level of experience
- Enable MGOs to get on the road and make asks sooner
- Build stronger relationships with new MGOs, leading to higher retention rates

This toolkit provides resources to create a an onboarding process that fits the needs of your institution.

Onboarding Versus Orientation

Onboarding and orientation are discrete activities. Orientation usually takes place during the new hire's first few days on the job. It provides new employees with critical information about the institution, the new hire's role, and the team culture. Onboarding is the extended process that trains and supports employees to master their role. Onboarding lasts at least 90 days. It allows new hires to build skills and competencies to succeed in the long term.

Recruitment Process → **Orientation** → **Onboarding** → **Success and Retention**

When to Use These Tools

The resources in this Toolkit are organized around milestones in the onboarding process. Use the following as a guide to when each tool is most relevant in the process:

Pre-Employment	First Week	30-, 60-, and 90-day Milestones
• MGO Skills Pick List and Prioritization Tool (page 13)	• MGO Skill Gaps Self-Assessment (page 14) • Flexible Onboarding Plan Template (page 15) • First Check-In Discussion Guide (page 27)	• Performance Goals List (page 19) • Performance Goals Discussion Guide (page 20) • Milestone Check-In Discussion Guide (page 28)

1) *Getting Onboard: A Model for Engaging New Employees*, Partnership for Public Service, 2008.

Source: EAB interviews and analysis.

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Planning Tailored Onboarding

SECTION 1

- Building a Best-In-Class Onboarding Program
- Tailored Onboarding in Practice
- Implementing Tailored Onboarding at Your Institution
- MGO Skills Pick List and Prioritization Tool
- MGO Skill Gaps Self-Assessment
- Flexible Onboarding Plan Template

Building a Best-in-Class Onboarding Program

Phases of Onboarding Provide Key Areas of Focus for Advancement Leaders

An onboarding program includes many moving parts. It starts with pre-employment activities and orientation, then goes through the first week to span the first six months and beyond. Mastery of the MGO role doesn't happen overnight, since MGOs come to institutions with different experiences and limited knowledge of the new organization's culture and politics.

Over the last two years of Advancement Forum Research, we have had conversations with CAOs and talent management staff to identify the components of a best-in-class onboarding program. These components are outlined in the table below. Recognizing that resources and staff size can limit the ability to integrate every element listed here, we believe that focusing on five high-impact items will significantly improve your onboarding process for MGOs.

Onboarding Phase[1]	Onboarding Materials
Pre-Employment *Prior to a new hire's first day*	❑ Welcome packet ❑ Welcome packet checklist ❑ Manager communication templates ❑ Day-to-day guide checklist ❑ Job descriptions ❑ Interview scoring guides ❑ Team directory (Book of Faces)
Orientation *First week on the job*	❑ First day checklist ❑ University orientation checklist ❑ Initial two week schedule ❑ Provide multi-point contacts with 'buddy,' team 'go-to,' mentors
Learning the Routine *First three to six months*	❑ **Comprehensive 90-day checklist** ❑ Prospect portfolio hand off process ❑ **Allow for shadowing opportunities** ❑ **Targeted relationship building** ❑ **Clear performance expectations for learning the routine** ❑ Manager check-in support materials
Mastering the Role *Six months and beyond*	❑ **Collaboratively set first 6–12 month financial and non-financial goals**

Focus on five high-impact 'to do' items to improve onboarding for advancement staff.

While this toolkit is focused on major gift officers, the insights, tools, and resources can (and should) be used to strengthen onboarding procedures for all members of the advancement team.

1) Phase names correspond to onboarding phases used by the University of Michigan Health System: Ann Arbor, MI.

Source: Philanthropy Leadership Council, HR Advancement Center, and EAB interviews and analysis.

Tailored Onboarding in Practice

Iowa State University Foundation's Flexible Onboarding Plans

Iowa State University Foundation ensures that onboarding is tailored to new hires with a Flexible Onboarding Plan. It combines Foundation priorities for skill development with the strengths and weaknesses of MGOs. This results in a clear plan for new hires that serves as a reference throughout their first 90 days. Flexible Onboarding Plans also enable managers to follow the skill development of the new hire.

The graphic below shows the steps that Iowa State University Foundation leaders use to create and use a tailored onboarding plan for each new hire. The tools in the rest of this section will enable you to implement a similar process, from identifying critical skills to creating a new hire's individualized onboarding plan.

Implementing Flexible Onboarding Plans

1 Advancement leaders identify critical skills for all MGOs

- "A" skills are a top priority with training early in the onboarding process
- Training for "B" and "c" skills is prioritized based on the new hire's skill gaps and experience

2 Skills are matched to types of training

- Training can include: peer mentoring, onboarding sessions, supervisor meetings, lunch meetings
- The time spent on each skill depends on the new hire's experience and needs

3 Manager customizes an onboarding plan for the new hire

- The plan is ready on the new hire's first day
- New MGOs discuss the plan with their manager during the first week
- MGOs have a clear idea of future training and expectations

4 MGOs and managers discuss the plan during regular check-ins

- MGO metrics are used to determine if any sessions need to be repeated
- New hires and managers are held accountable for onboarding tasks

See page 9 for a snapshot of a Flexible Onboarding Plan from the Iowa State University Foundation. Use the Flexible Onboarding Plan Template (page 15) to implement this practice at your institution.

Source: Iowa State University Foundation, Ames, IA; EAB interviews and analysis.

Sample Onboarding Plan

After determining which skills are necessary for a new hire, Iowa State University Foundation creates a tailored onboarding plan, which serves as the basis for a new hire's first 90 days. The resulting plan contains the following elements:

- Skills to be strengthened during onboarding
- The title of each session
- The name of the staff member who will provide the training
- When the training should occur during the first 90 days
- Priority level (on an A through C scale)
- The format the training will take

Skill areas and logistic information is completed before the new hire's first day, while the priority and place on the timeline are assigned during a conversation with the new hire.

Snapshot of a Flexible Onboarding Plan

Skills	Session Title	Staff Providing Training	Timeline	Priority	Venue
Qualifying and Cultivating Donors	Effective Strategies to Cultivate Donors	Advancement Leadership	15-30 Days	A	On-boarding
Closing Gifts	Effective Solicitation Strategies	Advancement Leadership	30-60 Days	A	On-boarding
Endowed Funds vs. Expendable Funds	Endowments vs. Expendable Funds	Advancement Leadership	30-60 Days	B	On-boarding
Fundraising and Foundation Ethics	Ethical Decision Making in Fundraising	Peer Mentor	30-60 Days	B	Lunch and Learn
Alumni and Foundation Awards	Effectively Using Awards in Donor Cultivation	Supervisor	As Needed	C	Meeting with Supervisor

Session information is entered before meeting with the new hire.

Sessions are led by a range of team members.

Color coding is based on training format.

Interactive training formats are preferred.

To see the a full sample onboarding plan from Iowa State, visit **eab.com**

Source: Iowa State University Foundation, Ames, IA; EAB interviews and analysis.

Implementing Tailored Onboarding at Your Institution

Questions to Guide Advancement Leaders

Once you have decided to implement tailored onboarding plans for new hires, it is crucial to determine your shop's priorities for new hires, challenges they may face, and plans for creating skill-building opportunities. Each MGO's tailored onboarding plan should include training and development opportunities based on these priorities, core skills for the role, and their own strengths and weaknesses.

Before the new hire's first day, determine the challenges that the new hire may face and institutional priorities that onboarding should emphasize. Use the following list of questions to find the crucial information that a new hire needs to know for success in the role. Keep this information in mind when designing tailored onboarding plans and holding milestone check-ins with the new hire. After answering these questions, diagnose skill gaps in the new hire in order to determine the priority level for each skill.

Key Questions to Guide the Creation of a Tailored Onboarding Plan

Skill Area	Questions to Ask
Targeted Relationship Building	❑ Who does the new hire need to meet? ❑ Do we personally need to facilitate introductions or can the new hire meet crucial partners on their own? ❑ Are there any politically-sensitive issues that we should ensure that the new hire knows to avoid?
Skill-Building Opportunities	❑ What skills do we need to ensure we develop early? ❑ What training opportunities are available in the first 90 days that will build that skill? ❑ What events are taking place that the new hire should attend to learn about their unit or how we interact with donors?
Clear Performance Expectations	❑ How will we create opportunities for participation in prospect strategy from the outset? ❑ What activities do we require frontline fundraisers to track? ❑ What objectives need to be met in the first 90 days?
Prospect and Donor Portfolio Hand-Off	❑ What steps will we take to help the new hire meet key donors and prospects? ❑ Who will they shadow on visits to get them started? ❑ Who will join them on key visits to ease the transition?

Source: Philanthropy Leadership Council and EAB interviews and analysis.

Diagnosing New Hires’ Skill Gaps

After establishing your institutional priorities, tailor onboarding to new hires by diagnosing skill gaps before, during, and after orientation. These skill gaps will help determine the priority for each training and development opportunity.

Diagnosing skill gaps occurs both directly (a personal assessment undertaken by the new hire) and indirectly (skill gaps may become evident during recruitment and orientation). Update the tailored onboarding plan over time to account for new strengths and weaknesses that may emerge.

Recruitment Process

Pre-Employment Skills Assessment

- Candidate experience and skill gaps may become evident during the hiring process
- Note strengths and weaknesses to address during onboarding process
- Determine skills necessary for all MGOs to succeed

> - Complete MGO Skills Pick List and Prioritization Tool (page 13) before beginning of orientation
> - Plan first week of onboarding with the new hire’s skill gaps in mind

Orientation Process

First Week Skills Discussion

- Finalize onboarding plan based on skill priorities and the MGO’s diagnosed skill gaps
- Prioritize sessions that will enable the MGO to see results quickly and are appropriate for their level of experience

> - New hire completes MGO Skill Gaps Self-Assessment (page 14)
> - Create a Flexible Onboarding Plan (page 15) that addresses department priorities and skill gaps

During Onboarding

First 90 Days Skills Follow-Up

- Add skill-building sessions or discussions as needed
- Ensure that high-priority skills have been addressed
- Reassess strengths and weaknesses

> - Review Flexible Onboarding Plan and MGO Skill Gaps Self-Assessment to determine progress

> Build a cohort of recent hires to address common weaknesses, build skills together, and continue high-priority professional development after the onboarding process.

Source: EAB interviews and analysis.

MGO Skills Pick List and Prioritization Tool

Description: A list of skills necessary for all MGOs created through conversations with chief advancement officers and talent leaders in the advancement field. Priority levels are based on overall importance and when the skill will first be used.

Instructions: Advancement leaders isolate 10 skills on the Pick List which are most crucial for MGO success. Rank skills in order of importance, then enter them into the Fundraising Skills table on the MGO Skill Gaps Self-Assessment (page 13) *Add additional skills if crucial areas for your team are not on the Pick List.*

MGO Skills Pick List

Place a check mark next to the 10 skills which are most crucial for MGO success at your institution.

- ❑ Cultivation strategy formation
- ❑ Cultivation strategy execution
- ❑ Discovery calls and cold-calling
- ❑ Aligning donors' passions with institutional priorities
- ❑ Pace of the visit
- ❑ Making the ask
- ❑ Negotiation
- ❑ Storytelling
- ❑ Active listening and empathy
- ❑ Closing a deal
- ❑ Qualitative data collection, analysis, and synthesis
- ❑ Quantitative data collection, analysis, and synthesis
- ❑ Writing for nonprofits, business, and sales
- ❑ Case development
- ❑ Creative thinking about proposals
- ❑ Writing proposals
- ❑ Time management
- ❑ Mission-driven
- ❑ Self-management and self-direction
- ❑ Ability to understand complex issues and big problems
- ❑ Personal finance acumen
- ❑ Ability to manage multiple personalities and priorities

MGO Skill Prioritization Tool

Rank the selected skills from most important to least important for MGO success at your institution.

Most Important

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

Least Important

Source: EAB interviews and analysis.

MGO Skill Gaps Self-Assessment

Description: A self-assessment to be completed by the new hire, then discussed during a meeting with the manager during the first week. Use responses to determine training priorities. At the end of onboarding, discuss skill growth for further professional development.

Logistical Note: *"Fundraising Skills" should include the ten skills identified using the MGO Skill Prioritization Tool (page 13). Insert these skills into the table before distributing to new hires.*

Instructions for new hires: Answer the questions in order to identify strengths and weaknesses.

Fundraising Skills
Place a check mark in the box that best describes your skill level.

Skill	*Skill Level*		
1.	❑ High	❑ Medium	❑ Low
2.	❑ High	❑ Medium	❑ Low
3.	❑ High	❑ Medium	❑ Low
4.	❑ High	❑ Medium	❑ Low
5.	❑ High	❑ Medium	❑ Low
6.	❑ High	❑ Medium	❑ Low
7.	❑ High	❑ Medium	❑ Low
8.	❑ High	❑ Medium	❑ Low
9.	❑ High	❑ Medium	❑ Low
10.	❑ High	❑ Medium	❑ Low

Previous Fundraising Experience

1. How many years of experience do you have? _____________

2. What types (if any) of fundraising training have you already completed?
____

____

3. What other skills would you like to develop?
____

____

4. What trainings would you like to attend?
____

____

Source: EAB interviews and analysis.

Flexible Onboarding Plan Template

Description: A plan for onboarding information and training sessions during the new hire's first 90+ days. Manager and MGO work together to determine time spent developing each skill.

Instructions: Managers should list skills, session titles, and descriptions before meeting with a new hire. The new hire and manager collaborate to assign priorities for each skill based on MGO Skill Prioritization Tool and MGO Skill Gaps Self-Assessment. Venue and contact information for session leaders should be added once sessions are scheduled.

MGO Onboarding Plan

Skills and Learning Sessions	Timeline	Priority	Time Allocation	Venue, Contact Person
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				
Skill: Session Title/Description:				

Source: Iowa State University Foundation, Ames, IA; EAB interviews and analysis.

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Individualized Performance Goals

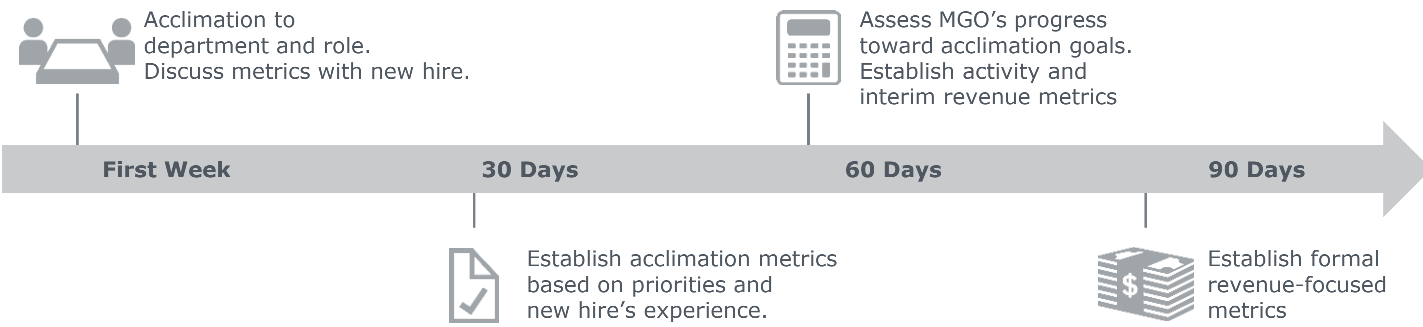
SECTION 2

- Determining Performance Goals
- Performance Goals List
- Performance Goals Discussion Guide

Determining Performance Goals

Acclimation, Activity and Revenue-Focused Metrics

When determining performance goals for new hires, begin with a focus on acclimation metrics. By the end of onboarding, add revenue-focused metrics to ensure that the new hire is meeting individual and team goals.



Determining Factors for Establishing Metrics

In addition to creating metrics that prioritize individual and team goals, managers should tailor metrics to the new hire by considering the following:

Factor	Impact on Performance Goal Consideration
Experience of New Hire	A background in fundraising will significantly reduce the adjustment time required to execute new responsibilities and meet revenue goals
New Hire Strengths and Weaknesses	Metrics should allow for skill development over time, especially when used during a tailored onboarding process
Portfolio Maturity	MGOs required to build a portfolio will start solicitations later than those with a portfolio of previously cultivated prospects
Position History	New positions require extended time for acclimation due to the implementation of new processes and the need to define the role within larger team
Career Development	Goals should be designed to enable progression within the organization in a transparent way

For examples of how to tie metric achievement to incentive compensation, see "Making Meaning of Metrics" at **eab.com**

Source: EAB interviews and analysis.

Performance Goals List

Description: Lists of performance goals based on onboarding milestones.

Instructions: Managers and new hires should agree on goals at the beginning of the milestone period. Goals should be reviewed at the end of the milestone period.

First 30 Days: Acclimation Metrics

Activity	Goal	Attainment
Shadowing Visits		
Shadowing Solicitations		
Identifying Prospects		
Cultivating Internal Institutional Relationships		
Setting Visits		
Creating Strategies		

60-90 Days: Activity Metrics and Interim Revenue Metrics

Activity	Goal	Attainment
Number of In-Person Visits		
Number of Gifts Closed		
Individual Funds Raised		
Team Funds Raised		
Campaign Progress		

90+ Days: Revenue-Focused Metrics

Area	Ratio	Goal	Attainment
Pool Coverage	# Unique Visits / # Total Prospects		
Effective Use of Visits	# Total Visits / # Asks		
Yield Rate	# Asks / # Major Gifts		
Accurate Ask Estimate	Ask Amount / Gift Amount		

Source: EAB interviews and analysis.

Performance Goals Discussion Guide

Description: This discussion guide equips managers to discuss performance goals with new hires. Questions are grouped by check-in milestones to ensure relevance within the onboarding process.

Instructions: Managers should complete appropriate sections of the Performance Goals List (page 19) before engaging in a performance goals discussion with the new hire. The discussion should enable the new hire to understand performance goals, while giving feedback about the goals assigned to them.

First Week: Determining Acclimation Metrics

With the new hire, explain how performance is evaluated within the department. Considering the new hire's role, experience, and current skill gaps, determine performance goals for the next 30 days.

1. Do these goals sound realistic?
2. Do you have the tools you need to start meeting these goals?
3. Do you have any questions about how performance will be evaluated?

First 30 Days: Assessing Acclimation Metrics

Assess how acclimation goals were met. Introduce activity metrics and interim revenue metrics. Give examples of how they are used in your department.

1. Which were the most challenging acclimatization goals to meet?
2. Were there any goals which you did not understand, or activities which you felt unqualified to do?
3. Do you understand how these goals can align with future revenue metrics?

60-90 Days: Determining Activity Metrics and Interim Revenue Metrics

Review activity metrics and interim revenue metrics with the new hire. Note that final revenue-focused metrics will be implemented after the next check-in.

1. Do you understand the new activity and interim revenue goals?
2. Do these goals sound realistic?
3. What do you need in order to attain your next set of goals during the next 30-60 days?
4. Are you worried about any specific metrics?

90+ Days: Determining Revenue-Focused Metrics

Assess attainment of all previous goals. Review revenue-focused metrics with the new hire and describe how they contribute to career progression and incentive compensation. Determine an evaluation plan for the next 6-12 months.

1. Do you understand the revenue-focused metrics?
2. Are you worried about any specific metrics?
3. Do you feel qualified to meet or exceed these goals?
4. Do you understand how the metrics contribute to the potential for career progression?
5. What do you need in order to attain these goals during the next 6-12 months?

Source: EAB interviews and analysis.

90-Day Onboarding Checklist

SECTION 3

- 90-Day Onboarding Checklist Template
- First Check-In Discussion Guide
- Milestone Check-In Discussion Guide

90-Day Onboarding Checklist Template

Description: A checklist of onboarding activities to be completed by both the manager and new hire. Spanning from pre-employment through the first 90 days, use the checklist as an advancement-specific addendum to existing general university onboarding checklists provided by human resources (HR).

Instructions: The new hire's manager and team's HR liaison should begin using the checklist before the start date. Place a check mark in the box once the task is complete.

Employee Name: ____ **Start Date:** ______________

30-Day Check-In Date:	60-Day Check-In Date:	90-Day Check-In Date:	Probationary Period End Date:
____________________	____________________	____________________	____________________
❑ Completed	❑ Completed	❑ Completed	❑ Completed

Pre-Employment

Manager Tasks:

- ❑ Send a personal welcome note prior to their start date
- ❑ Communicate to HR and to development staff the new hire's start date, background, key responsibilities, and contact information
- ❑ Work with appropriate department to select new hire's workspace
- ❑ Ensure necessary resources are scheduled to be in place upon their arrival including:
  - ❑ Computer
  - ❑ Phone
  - ❑ Development database access
- ❑ Identify someone to greet them on their first day and give them a tour
- ❑ Assign a peer coach or "buddy" to guide them through the first few weeks of employment
- ❑ Create the new hire's portfolio by reviewing the existing prospect portfolio for the position and reassigning prospect assignments with development services team
- ❑ Create the schedule for the new hire's first week including:
  - ❑ Week one check-in with manager
  - ❑ Meetings with members of the development team for acculturation and learning
  - ❑ Team standing meetings– include the meeting title and recurring dates
- ❑ Create a welcome packet including:
  - ❑ Self-directed learning opportunities
  - ❑ How to set up an eab.com login by contacting your relationship manager
  - ❑ Key contact list
  - ❑ Training and reading materials
  - ❑ Skill Gaps Self-Assessment
- ❑ Identify university allies that the new hire should meet; meetings should be targeted to take place after the first 30 days
- ❑ Identify shadowing opportunities for new hire to attend with direct manager or other development team members

Download the 90-Day Onboarding Checklist template, and customize it for your institution at **eab.com**

Source: EAB interviews and analysis.

Week One

Manager Tasks:

- ❑ Review first week schedule and standing meetings with new hire
- ❑ Assign a designated development team member to give the new hire a tour of the department and institution–highlight meeting spaces, common areas, and restrooms
- ❑ Schedule one-on-one introductory meetings with key development team members
- ❑ Ensure all HR materials are complete and filed appropriately
- ❑ Assign key reading assignments for new hire to learn development team facts and figures, and policies and procedures
- ❑ Ask peer coach or "buddy" to invite new hire for an introductory meeting
- ❑ Manager and new hire complete first week check-in
  - ❑ Outline plan for remainder of the first 30 days
    - ❑ Discuss Skill Gaps Self-Assessment to identify current strengths and areas for improvement to create onboarding program
  - ❑ Review performance accountabilities for the position as they relate to the first 30 days
    - ❑ Learn the advancement shop
    - ❑ Acclimatize to the university system
    - ❑ Review placement within academic department or program

New Hire Tasks:

- ❑ Attend university orientation
- ❑ Meet with database services team for preliminary training on the advancement system
- ❑ Become familiar with names and titles of senior university leadership
- ❑ Complete Skill Gaps Self-Assessment before first week check-in with manager
- ❑ Attend first week check-in with manager

Source: EAB interviews and analysis.

Remainder of First 30 Days

Manager Tasks:

- ❑ Monitor progress of new hire in completion of their assignments
- ❑ Ensure that shadowing opportunities are provided
- ❑ Observe the new hire during a simulation or role-playing activity
- ❑ Manager and new hire complete 30 day check-in
  - ❑ Outline plan for next 30 to 60 days
  - ❑ Review performance accountabilities for the position as they relate to the next 60 days:
    - ❑ Continue shadowing experiences with peer coach and manager
    - ❑ Begin being shadowed on alumni visits
    - ❑ Begin to build key relationships with university allies

New Hire Tasks:

- ❑ Learn the advancement shop
  - ❑ Complete meetings with identified key development colleagues
  - ❑ Complete full development database training–if no formal training provided, schedule a one-hour Q&A session with a peer MGO or database services team member
- ❑ Prepare for prospect meetings
  - ❑ Shadow manager or peer on donor discovery visit
  - ❑ Shadow manager or peer on donor visit
  - ❑ Conduct a donor discovery visit with manager
  - ❑ Conduct a donor visit with manager
- ❑ Identify opportunities to get in front of alumni and other donors
  - ❑ Review prospect and donor files
  - ❑ Work with manager to outline which visits should occur when
  - ❑ Review prospect pool and start discovery visits with identified prospects
  - ❑ Begin actively tracking and creating strategy for prospects in the development database
  - ❑ Identify potential gift requests (of any size, including renewing an annual gift) that can be made over the next two months
  - ❑ Close a first gift, regardless of size
- ❑ Acclimatize to the university
  - ❑ Demonstrate a basic understanding of the university and a deeper understanding of the department with which the MGO is affiliated
  - ❑ Gain familiarity with key allies from university administration, board of trustees, or other volunteers
  - ❑ Review assigned administrative and faculty allies with manager
  - ❑ Determine a plan for meeting key allies, understanding which meetings can be scheduled by the MGO and which are more appropriately scheduled by the manager
  - ❑ Acquire university apparel
- ❑ Attend 30-day check-in with manager

Source: EAB interviews and analysis.

Second Month: First 60 Days

Manager Tasks:

- ❑ Observe new hire complete the following:
  - ❑ Donor discovery visit
  - ❑ Donor visit
- ❑ Support the new hire on the appropriate outstanding introductory visits
- ❑ Review all potential gift requests (of any size, including renewing an annual gift) that can be made by the new hire over the next two months
- ❑ Complete 60-day check-in
  - ❑ Outline plan for next 30 days
  - ❑ Discuss successes and opportunities for growth
  - ❑ Identify skills and competencies to build over the next 120 days

New Hire Tasks:

- ❑ Continue shadowing experiences (including being shadowed by peer coach and manager)
  - ❑ Conduct a donor discovery visit with manager or peer
  - ❑ Conduct a donor visit with a manager or peer
- ❑ Continue building relationships with university allies
  - ❑ Complete any unfinished introductory visits
- ❑ Continue conducting discovery visits with identified prospects
- ❑ Identify potential gift requests (of any size, including renewing an annual gift) that can be made over the next two months
- ❑ Begin actively participating in prospect meetings and other development team meetings
- ❑ Continue to identify opportunities to get in front of prospects and donors
  - ❑ Review prospect and donor files
  - ❑ Work with manager to outline which visits should occur when
- ❑ Attend 60-day check-in with manager
- ❑ Manager and new hire complete 60-day check-in
  - ❑ Outline plan for next 30 days
  - ❑ Discuss successes and opportunities for growth
  - ❑ Identify skills and competencies to build over the next 120 days

Source: EAB interviews and analysis.

Third Month: First 90 Days

Manager Tasks:

- ❑ Manager and new hire complete 90-day check-in
  - ❑ Review performance accountabilities for the position as they relate to the next three months to one year (timing can vary based on fiscal year):
    - ❑ Complete the probationary period
    - ❑ Review progress toward interim goals
    - ❑ Clearly outline the end-of-year target goal for the position
    - ❑ Collaboratively set financial and non-financial goals for a 6-12 month time frame based on the fiscal year
  - ❑ Adjust goals as appropriate based on prospect pool and department affiliation
  - ❑ Document goals in the performance management system for the appropriate reporting period
  - ❑ Collaboratively build an individual development plan to guide skill and competency building over the performance evaluation period
- ❑ Schedule recurring check-in meetings
- ❑ Discuss Skill Gaps Self-Assessment to determine skills growth and areas for improvement

New Hire Tasks:

- ❑ Continue building relationships with faculty allies
  - ❑ Complete any unfinished introductory visits
- ❑ Continue conducting discovery visits with identified prospects
- ❑ Close first gift, regardless of size
- ❑ Identify additional potential gift requests (of any size, including renewing annual gift) that can be made over the next two months
- ❑ Continue to identify opportunities to get in front of prospects and donors
  - ❑ Review prospect and donor files
  - ❑ Work with manager to outline which visits should occur when
- ❑ Complete 90-day check-in with manager

Source: EAB interviews and analysis.

First Check-In Discussion Guide

Overview: This discussion guide equips managers to engage in more meaningful conversations with new hires.

Instructions: Managers should schedule and hold the first check-in at the end of the new hire's first week. Use this guide as a conversation framework.

1. Which team members have you met this week?
   - Who on the organization chart for the development team haven't you met with yet?

2. Who on the team made you feel welcome?

3. If you had questions, was someone able to answer them?
   - Who has helped you the most?

4. What did you find particularly enjoyable/informative about your first week?

5. Has there been anything particularly challenging this week?

7. Is there anything we haven't explained fully?

8. Do you have the technology, database access, and other tools necessary to perform your assigned responsibilities?

9. Is there anything you need from me?

10. Let's discuss the Skill Gaps Self Assessment:
    - *Discuss their strengths and weaknesses*
    - *Complete the Onboarding Matrix based on results*
    - *Schedule any necessary training sessions*

11. Lets discuss your schedule for the next two weeks:
    - *Confirm appropriate meetings are on their calendar*
    - *Include recurring one-on-one check-ins as well as 30-, 60-, and 90- day check-ins*
    - *Determine if there are any donor visits or prospect visits available for them to shadow*
    - *Outline/schedule ally meetings that you will attend together*
    - *Begin to develop the list of development team members and additional allies that the new hire can schedule meetings with independently*

Source: EAB interviews and analysis.

Milestone Check-In Discussion Guide

Overview: This discussion guide equips managers to gauge how a new hire is adjusting and surface potential fit and retention risk concerns. Questions are grouped by check-in milestones to ensure relevance to the new hire.

Instructions: Managers should meet formally with each new hire after the first 30, 60 and 90 days of employment. If the new hire's responses signal that they may be a retention risk, managers should consider actions to right-size expectations and monitor progress.

Milestone Discussion Questions:	Signals of Possible Concern:
30 Days 1. Do you have the tools and equipment you need to do your job? 2. Which coworkers have been especially helpful to you? 3. Tell me what you've learned thus far. What outstanding questions do you have about the department? What can I help to explain about the department?	• Unable to provide examples of helpful colleagues • Unable to share any learning • Uninterested in sharing feedback
60 Days 1. What sources have you found useful for information about the department? 2. Describe any frustrations you've experienced so far. 3. Have you done anything to address these frustrations? 4. How can I be helpful to you? 5. If you could change one aspect of your experience in the department thus far what would it be?	• Lists unreliable information sources • Uninterested in personal development • High number of frustrations • Has not tried to resolve problems, or blames others for problems • Is bothered by typical conditions of the development shop
90 Days 1. Has this job met your expectations? In what ways? Where has it fallen short? Where has it exceeded your expectations? 2. In what areas would additional training be helpful for you? 3. Do you have any concerns about your job that I could address? 4. On which aspects of your job performance would you like more feedback or support? 5. Is there anything that you think we should change to help new staff during their first week on the job here? Can you tell me more about why we should make that change?	• Unrealistic expectations about work conditions • No desire to help development shop improve • Answer to primary question is "no" • High number of concerns • Does not share any concerns, but appears dissatisfied or anxious

Source: EAB interviews and analysis.

EAB

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