

| | TEMPLATE!!! | | | | |
|--------------------------|--------------------|---|-----------------|----------|--|
| ☑ | AREA | TASK | RESPONSIBLE | DEADLINE | NOTES |
| | PRE-TASKS | | | | |
| <input type="checkbox"/> | PRACTICALITIES | Sort contract | Relevant worker | | |
| <input type="checkbox"/> | | Agree job description | Relevant worker | | |
| <input type="checkbox"/> | | Agree worker buddy pairing | Team | | |
| <input type="checkbox"/> | | Sort a welcome card etc. | Buddy | | If PAYE: post with computer equipment/stationery/treats etc. |
| <input type="checkbox"/> | | Organise a social | Buddy | | |
| <input type="checkbox"/> | HR & WORKPLAN | Develop a workplan | Relevant worker | | |
| <input type="checkbox"/> | | - Induction workplan for first X weeks/month in role | Relevant worker | | |
| <input type="checkbox"/> | | - Include a discrete list of activities to come back to | Relevant worker | | |
| <input type="checkbox"/> | | - Send to core team for review & input | Relevant worker | | |
| <input type="checkbox"/> | | Integrate with meeting cycle | Relevant worker | | |
| <input type="checkbox"/> | | Setup payroll & banking access | Relevant worker | | |
| <input type="checkbox"/> | TECH & RESOURCES | Set up Google Workspace account | Relevant worker | | |
| <input type="checkbox"/> | | - Setup Drive & share Google Drive folders | Relevant worker | | |
| <input type="checkbox"/> | | - Add to Chat spaces | Relevant worker | | |
| <input type="checkbox"/> | | - Share Calendars & check (including 'Meetings & Reminders' calendar) | Relevant worker | | |
| <input type="checkbox"/> | | - Set up default Google Doc formatting > | Relevant worker | | #link |
| <input type="checkbox"/> | | - Change mail settings & add signature | Relevant worker | | |
| <input type="checkbox"/> | | - Update team@ group with newest member email | Relevant worker | | |
| <input type="checkbox"/> | | - Add their birthday to the calendar | Relevant worker | | |
| <input type="checkbox"/> | | Add Quickfile/finance account | Relevant worker | | |
| <input type="checkbox"/> | READING LIST | Update reading list | Relevant worker | | #link |
| | FIRST DAY | | | | |
| <input type="checkbox"/> | WELCOME | Send Intro email, inc. Reading List / Key dates / Working hours etc. | Buddy | | Template #link |
| <input type="checkbox"/> | | Meet the team: some kind of welcome call/celebration/shared lunch | Buddy | | |
| <input type="checkbox"/> | | Buddy check-in: Overview & distil core needs, intro to buddy system! | Buddy | | |
| <input type="checkbox"/> | | Tech & systems intro: email, calendar, Drive, Chat... | Relevant worker | | |
| | FIRST 3 WEEKS | | | | |
| <input type="checkbox"/> | TECH | Logins & Accounts: Support new starter to find their way around these! | Relevant worker | | |
| <input type="checkbox"/> | TEAM | 1:1 with Team Member 1 | Member 1 | | date/time tbc |
| <input type="checkbox"/> | | 1:1 with Team Member 2 | Member 2 | | date/time tbc |
| <input type="checkbox"/> | | 1:1 with Team Member # | Member # | | date/time tbc |
| <input type="checkbox"/> | WORKPLAN & SUPPORT | Buddie meets: agreed frequency | Relevant worker | | |
| <input type="checkbox"/> | INTERNAL WORK | Structure: Overview, systems & ways of working, culture, trouble-shooting | Relevant worker | | |
| <input type="checkbox"/> | | Policies: Overview of internal policies, signed-off & in-development | Relevant worker | | |
| <input type="checkbox"/> | | Fundraising: Overview | Relevant worker | | |
| | FIRST 8 WEEKS | | | | |
| <input type="checkbox"/> | WORKPLAN & SUPPORT | Buddie meets | Buddy | | |
| <input type="checkbox"/> | | Induction oversight, updating, chasing tasks | Relevant worker | | |

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|-------------------------------------|---------------|---|------------------|----------|-------|
| <input checked="" type="checkbox"/> | AREA | TASK | RESPONSIBLE | DEADLINE | NOTES |
| <input type="checkbox"/> | | Workplan: Co-develop longer-term workplan with new worker | Relevant worker | | |
| <input type="checkbox"/> | EXTERNAL WORK | Work Overview: Roles/Areas, Strategy & Workplan intros | Relevant worker | | |
| <input type="checkbox"/> | | Work-specific 121 with Team Member 1 | Member 1 | | |
| <input type="checkbox"/> | | Work-specific 121 with Team Member 2 | Member 2 | | |
| <input type="checkbox"/> | | Work-specific 121 with Team Member # | Member # | | |
| <input type="checkbox"/> | | Comms: Newsletter & Social Media etc. | Relevant worker | | |
| <input type="checkbox"/> | COMMS | Ask for their bio & photo | Relevant worker | | |
| <input type="checkbox"/> | | Add bio & photo to website | Relevant worker | | |
| <input type="checkbox"/> | | Add website user & give permissions | Relevant worker | | |
| <input type="checkbox"/> | | Add to forum & make moderator | Relevant worker | | |
| <input type="checkbox"/> | | Introduce to funders (as appropriate) | Relevant workers | | |
| <input type="checkbox"/> | | Introduce to partners (as appropriate) | Relevant workers | | |
| | LATER | | | | |
| <input type="checkbox"/> | | Mid-Provisional check-in (3 months) | Relevant worker | | |
| <input type="checkbox"/> | | Provisional review (6 months) | Relevant worker | | |