

## **Day 9 of the 12 Days of TRIO Essential Onboarding Checklists for New TRIO Staff\***

If yesterday was all about grounding your team in the *core* documents every TRIO professional should have, today goes one step further. Day 9 delivers something many programs know they need but rarely have time to build well, solid onboarding checklists for each staff role.

These checklists walk a new hire through their first month, from pre-start prep to compliance training to technology setup. When done right, they keep your team aligned, your data clean, and your APR predictable, which makes everyone's life a whole lot easier.

Today's downloadable "gifts" come straight from the SSS world, but don't let that stop you. You can revise and adapt every one of these checklists for **Talent Search, Upward Bound, EOC, McNair, and VUB**. The structure works for all TRIO programs. Here are the four role-based onboarding checklists included in today's gifts.

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### **1. Project Director New Hire Onboarding Checklist**

This outlines exactly what an incoming Director needs to do and learn, from reviewing the GAN to understanding EDGAR, the Uniform Guidance, and the project's allowable services. It covers meetings with leadership, APR responsibilities, supervision, budget oversight, and data integrity. In short, it helps a new Director avoid trial and error and jump straight into compliant management.

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### **2. Project Advisor New Hire Onboarding Checklist**

A strong Advisor is the backbone of any SSS project, and this checklist provides a structured start, covering student intake procedures, advising expectations, financial aid guidance, database training, and APR awareness. New Advisors often feel overwhelmed, so providing a roadmap helps them stay focused and confident.

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### **3. Project Tutor New Hire Onboarding Checklist**

This checklist gives your Tutors the structure they need to start strong, especially since they are often the first line of academic support for your students. It guides them through eligibility verification, professionalism expectations, FERPA boundaries, tutoring strategies, documentation requirements, and technology tools. It also includes training on high-risk courses, study skills development, and when to escalate concerns to Advisors or the Director.

#### **4. Project Peer Mentor New Hire Onboarding Checklist**

This checklist outlines academic eligibility, expectations, training, FERPA boundaries, communication procedures, and weekly reporting. It also guides them through the skills needed to build rapport, support new students, and connect participants with campus resources.

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##### **\*A quick reminder**

These are SSS-specific versions, but the structure easily adapts to any TRIO program. Swap in the services and regulations for UB, UBMS, TS, EOC, VUB, or McNair, and you suddenly have a full-onboarding suite that meets federal expectations and keeps your internal operations sharp.

And yes, you can absolutely tackle this on your own. Many programs do. But if you want NEC to develop polished, customized onboarding documents for every staff role in your TRIO project, we handle this every week for programs across the country. Sometimes, having a team handle the building for you saves significant time and reduces guesswork.

More onboarding resources are coming in the next few days, so stay tuned, keep organizing, and keep training your team well. Tradition teaches us that a well-prepared staff is the best insurance policy a TRIO project can have.

See you tomorrow for Day 10.