**President Advancement Onboarding Packet Sample Outline**

* Advancement overview
  + Structure of the university’s Advancement operation including org charts and team descriptions.
  + Overview of the president’s role in fundraising
* Strategic plan/priorities and current progress
  + Including campaign plans/progress if relevant
* Historic fundraising and engagement totals and trends
* Events
  + Overview of typical yearly events
  + Discussion of president’s preferences for event staffing and travel
    - Discussion of first family’s role, if applicable
* Key donors and prospects
  + 30/60/90 day plan for priority calls/visits
  + Show a briefing example and discuss preferences/changes
  + Discuss preferences for visit staffing, scheduling, etc.
* Communication plans
  + Decision announcements to different constituencies
  + Press conference
  + President’s first-day message
* Leadership boards
  + Trustees
  + Alumni Association
* Athletics
* Stewardship
  + Giving societies and events
  + Stewardship practices in president’s name