**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