PLAN THE ASSIGNMENT

New Hire Readiness Checklist Nonprofit program coordinators

Ready means the coordinator's required conditions for a named program activity are supported by current evidence and the receiving supervisor's specified confirmation. Completing orientation, accepting a handoff and delivering the activity are separate facts.

Adapt to the program, participant population, jurisdiction and funding. Screening, safeguarding, regulated duties and specialist decisions stay with their authorized owners.

Person reference / assignment ID

Program / participants / activity / location

Receiving owner / backup

Original work-needed date and time / time zone

Current work-needed date and time / change reason

Separate milestones: Employment start / First supported activity / First independent activity

Milestone dates / limits on duties at each stage

Use: Agree the applicable conditions, proof, owner and needed time. Keep medical, screening, participant or patient details in controlled source systems. The shared checklist holds only necessary operational status and source references.

CHECKLIST 1-3

Nonprofit program coordinators

Assignment ID: _____ Reviewed by: _____

01 Name the program work and the date it is needed.

Specify the program, participant group, location or delivery channel, first activity and expected workload. Separate the employment start date from the date the coordinator will handle intake, lead a session or own a reporting deadline. Identify what requires supervision and who can authorize independent work.

Enough evidence: A dated assignment accepted by the receiving manager, with first duties and limits on authority.

Owner: Program manager with HR
Needed: Before promising delivery capacity.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

02 Make the program boundaries usable. [1]

Walk through who the program serves, its intended result, current eligibility and referral rules, and what the coordinator may promise. Identify the current forms, service commitments and partner contacts. Use an example to check how the coordinator handles a request outside the program's scope. NCVO induction guidance.

Enough evidence: Current program brief and an accurate explanation of one routine request and one out-of-scope request.

Owner: Program manager
Needed: Before answering participant or partner inquiries.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

03 Confirm the prerequisites for these duties.

Have the authorized owner identify employment prerequisites, required screening, training, credentials and any restrictions for the actual assignment. Confirm their status at the applicable deadlines. A check submitted or course booked remains pending. Keep sensitive screening details with the responsible source; record only the clearance status and work limits needed here.

Enough evidence: Dated status from the authorized owner, tied to the activity and any limits.

Owner: HR and the designated compliance or safeguarding owner
Needed: Before the activity or access each prerequisite controls.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

Next action / owner / due time

CHECKLIST 4-6

Nonprofit program coordinators

Assignment ID: _____ Reviewed by: _____

04 Practice the safeguarding and concern-reporting route. [2]

Identify the conduct boundaries, safeguarding contact and backup, and the current internal and external reporting routes that apply. Use a short scenario to check the coordinator knows what to do and when. Internal escalation must not replace any required external report. For youth-serving programs, screening is one part of a broader prevention approach. CDC youth-serving organization framework.

Enough evidence: Completed relevant preparation and an accurate scenario response, checked against current local procedures.

Owner: Designated safeguarding or compliance lead
Needed: Before relevant participant contact.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

05 Establish how participant information may be used. [3]

Identify the approved record system, minimum information needed, permission or consent rules for each use, and who may receive it. Keep service participation, referral sharing, photography and publicity permissions distinct where the program requires them. Explain how to handle a correction, accidental disclosure or uncertain request. Store sensitive information in the controlled record system. FTC security guidance.

Enough evidence: Approved handling instructions and a checked example of permitted sharing and escalation.

Owner: Program data or privacy owner
Needed: Before accessing, collecting or sharing participant information.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

06 Test the actual system permissions.

Confirm the coordinator's own account, required authentication, device and access to the specific program records and functions. Test a routine task with approved fictional data: create a sample intake, save it, locate it and route it for review. A successful login does not establish permission to perform the work. Keep access limited to the assigned duties.

Enough evidence: Successful task test and the system owner's confirmation of the intended access scope.

Owner: System owner with the coordinator
Needed: Before relying on the account for live work.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

CHECKLIST 7-9

Nonprofit program coordinators

Assignment ID: _____ Reviewed by: _____

07 Accept the existing work handoff.

Review active commitments, upcoming contacts, unresolved referrals, waiting lists and deadlines with the outgoing owner or manager. Identify who owns each open action now. Confirm partner contacts and the approved way to share information. An introduction email does not establish that a referral was accepted or that a service is available.

Enough evidence: Dated handoff of open work, accepted ownership, and confirmation from partners where their capacity is needed.

Owner: Outgoing owner or program manager and receiving coordinator
Needed: Before taking responsibility for existing commitments.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

08 Confirm the place, equipment and participant instructions.

Check the room or virtual platform, booking, entry arrangements, equipment, materials and setup time. Confirm who sends joining instructions, location changes and cancellations. For off-site work or travel, check the applicable arrangements and contact route. Keep arrival-only checks open until someone performs them.

Enough evidence: Confirmed booking and availability, tested equipment or platform, and approved participant instructions.

Owner: Coordinator with facilities, host or technology owner
Needed: Before invitations or arrangements become difficult to change.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

09 Arrange the access and communication support people need. [4]

Confirm how participants request support and who arranges it. Check relevant venue access, accessible materials, communication aids and language assistance with the responsible owners. Obtain confirmation of the specific support needed for the activity. For covered US entities, DOJ guidance addresses effective communication with people with communication disabilities. DOJ effective communication guidance.

Enough evidence: Agreed support arrangements, provider availability where needed, and a usable route for new requests.

Owner: Program manager and designated accessibility or language-support owner
Needed: Before participants need the support.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

CHECKLIST 10-12

Nonprofit program coordinators

Assignment ID: _____ Reviewed by: _____

10 Confirm staff and volunteer coverage.

Name who will attend, what each person may do, and who covers an absence. Check relevant preparation, supervision and locally required staffing arrangements. Make the coordinator's authority to direct volunteers explicit. A full signup sheet does not establish that the required people are prepared and available.

Enough evidence: Accepted duty roster with preparation status, supervision and backup arrangements.

Owner: Program manager and volunteer coordinator
Needed: Before counting the activity as staffed.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

11 Confirm spending and resource authority. [5]

Identify the available budget, applicable funding restrictions, purchasing approvals, reimbursement process and controls for cash, cards or supplies. Work through a small purchase request with the responsible owner. Access to a budget spreadsheet does not confer authority to spend. Nonprofit internal-control guidance.

Enough evidence: Confirmed spending limits and approval route, with the example request handled correctly.

Owner: Budget owner with finance
Needed: Before committing funds or resources.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

12 Set up records and reporting before data is needed. [6]

Identify the current reporting template, required fields, definitions, deadlines and reviewer. Confirm how attendance, services delivered, follow-up and outcomes are recorded without double counting. Test a fictional entry. A count of people attending is an output; it does not by itself establish the intended participant outcome. Nonprofit outcome-measurement guidance.

Enough evidence: Checked sample entry or report, agreed definitions, and a named reviewer and due time.

Owner: Program reporting or evaluation owner; grants lead where applicable
Needed: Before collecting the first reporting-period data.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

Next action / owner / due time

CHECKLIST 13-15

Nonprofit program coordinators

Assignment ID: _____ Reviewed by: _____

13 Walk through disruptions and emergencies. [7]

Locate emergency contacts, exits and the applicable response procedures. Clarify who contacts emergency services, accounts for people, and decides to pause, relocate or cancel an activity. Include lone or off-site work where relevant. Establish the coordinator's role and limits; a contact list alone is not a practiced response. OSHA emergency-planning guidance.

Enough evidence: Site briefing and a checked walkthrough of one plausible disruption or emergency.

Owner: Site or safety lead with the program manager
Needed: Before working at the location or leading the activity.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

14 Confirm the supervisor has capacity to receive the coordinator.

Reserve time for questions, observation and review. Set a realistic first workload, name a backup, and explain how to resolve competing requests from program, grants and operations staff. Confirm the supervisor's actual availability for the first activity, including an evening or weekend session where applicable.

Enough evidence: Accepted support plan, scheduled check-in, available backup and first-workload agreement.

Owner: Receiving program manager
Needed: Before allocating the coordinator's independent capacity.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

15 Observe a small end-to-end rehearsal.

Use fictional participant details to rehearse the assigned work: receive an inquiry, apply the relevant rules, prepare the activity, record delivery and route a follow-up. Include one exception, such as an uncertain referral or an absent volunteer. Observe only the duties that matter for the first assignment; record any further practice needed.

Enough evidence: Dated observation of the named tasks against agreed criteria, including unresolved gaps.

Owner: Qualified supervisor or designated assessor
Needed: Before independent work requiring that demonstration.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

Next action / owner / due time

CHECKLIST 16-18

Nonprofit program coordinators

Assignment ID: _____ Reviewed by: _____

16 Record a readiness decision for the named work.

Review all applicable required conditions and the specified receiving-supervisor confirmation. State which activity is supported by current evidence, the permitted duties and any supervision. Keep open conditions visible. If only shadowing or a different activity is supported, define that separate scope and establish its own prerequisites.

Enough evidence: Dated decision with evidence references, work scope, restrictions and next review trigger.

Owner: Authorized program manager with prerequisite owners
Needed: Before the coordinator takes responsibility for the activity.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

17 Verify what actually happened.

Record whether the coordinator began the named work at the needed time, what was delivered, and any delay or limitation. Check the first records and follow-up handoff. Keep worker readiness, service delivery and participant outcomes separate. If nobody has confirmed delivery, leave the outcome unknown.

Enough evidence: Dated observation or delivery record and acceptance of any next action.

Owner: Receiving supervisor and the relevant record owner
Needed: At the agreed first-activity review.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

18 Recheck only what the change affects.

A new participant group, venue, service, system role, funding condition or supervisor can change the prerequisites. Identify the affected evidence and confirmation, retain unaffected valid evidence, and preserve the earlier decision. Keep original and revised delivery dates and the reason for any move.

Enough evidence: Change record, affected conditions, and renewed evidence or confirmation where required.

Owner: Owner of each changed requirement
Needed: Before relying on the changed arrangement.

State: Met / Unmet / Unknown / N/A Evidence / confirmation reference:

Next action / owner / due time

EVIDENCE AND CONFIRMATION

Record the decision

Keep the condition, human decision and observed outcome separate.

Met: current evidence satisfies the agreed condition. **Unmet:** evidence establishes a gap. **Unknown:** status is not established. **N/A:** the authorized owner records why it does not apply.

Assigned, in progress and reported complete describe action progress. Record stale evidence, conflicts and exceptions separately. An exception does not turn an unmet condition into met or override a legal requirement.

Requirement / evidence reference / authoritative source

Observed or verified by / at / freshness / conflict

Prior state / changed context / new state / reason

Authorized program manager confirmation

Supported work / evidence reviewed / supervision and limits

Open conditions / affected work / next action and owner

Confirmed by / role / date and time / next review trigger

Actual work start / outcome / observer and time

Sources and working notes

Source checks: 02 Oct 2026. Apply current local and role-specific requirements.

Fictional example: Two coordinators can log in but cannot use the referral workflow. One system owner can resolve the shared access issue. Each coordinator still needs their own task test and required observed practice.

Changes: Preserve earlier evidence and decisions. Recheck affected conditions after a change in work, location, dates, equipment or support. Retain valid unaffected evidence. Confirm the actual start separately.

Source references

[1] NCVO: Induction and probation
UK charity-sector practice; page reviewed August 2022. Used for role clarity and supported induction, not US employment law.

[2] CDC: Preventing Child Sexual Abuse Within Youth-serving Organizations
2007 prevention framework, pp. 3-24. Applies to youth-serving settings; not a current statement of local screening or reporting law.

[3] FTC: Start with Security
Practical data-minimization, access-control and training guidance. Used as security practice, not a claim that every nonprofit falls under FTC jurisdiction.

[4] US Department of Justice: Effective Communication
US ADA guidance for covered entities; disability-related communication support. Does not establish every language-access or physical-access requirement.

[5] National Council of Nonprofits: Internal Controls for Nonprofits
Nonprofit practice guidance on spending authority, documentation and separation of duties. Local policies and grant terms determine specific controls.

[6] National Council of Nonprofits: Evaluation and Measurement of Outcomes
Practice guidance distinguishing activities and outputs from outcomes; not a prescribed funder reporting scheme.

[7] OSHA: Emergency Action Plan eTool
US workplace emergency-planning guidance. Formal requirements depend on applicable standards; participant-specific arrangements need their own local plan.

Where SteadySlate fits

This template works with existing records. SteadySlate is being developed as a thin decision-attention layer connecting dated work needs, missing evidence, responsible owners and useful confirmation. People make readiness decisions; source systems retain authority.