

PROFESSIONAL & ORGANIZATIONAL DEVELOPMENT

UNIVERSITY *of* WASHINGTON

ONBOARDING TOOLKIT



FOR UW MANAGERS





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Dear Manager,

Congratulations on the successful hire of your new employee! We hope to be part of their onboarding process through the in-person New Employee Orientation workshop.

This is an exciting time for you and your new employee, but it is only the beginning. Research shows that providing onboarding throughout an employee's first 90 days greatly increases employee retention and productivity. In addition to New Employee Orientation, there are many activities and processes that your employee needs to feel welcomed and supported.

A successful relationship could be the difference between retaining your employee and starting a new search for their replacement. This Onboarding Toolkit provides checklists for you and your employee, as well as suggestions for how to develop and maintain a successful relationship with your new employee. It also provides a few suggestions for developing your internal onboarding process.

Feel free to connect with us for any help in your onboarding process. You may call us at 206.543.1957 or email pod@uw.edu.

Happy Onboarding,

Professional & Organizational Development

► WHAT IS ONBOARDING?

- Brings your newly hired talent up to speed with the policies, processes, culture, expectations, and day-to-day responsibilities of your department/unit.
- Ensures new employees feel welcome and excited, confirming why they joined your department/unit and the University of Washington.

► WHY IS ONBOARDING IMPORTANT?

- Builds UW and your unit/department's reputation for being a thoughtful employer, with great training, clear leadership, and a strong organization.
- Helps you retain your staff members.
- Reduces high turnover costs.
- Gets new staff members to efficient productivity levels quickly.
- Builds a cohesive team, therefore raising everyone's productivity.

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▶ **Setting the Stage**

This checklist provides suggestions and ideas for you to set the stage for success and begin building a strong connection with your new employee.

▶ **New Employee Checklist**

This is your go-to list for the initial information new employees should receive. It's recommend that you and your employee sign the checklist to confirm that necessary information has been shared; keeping the signed copy on file provides an excellent record.

▶ **Mentor Checklist**

Delegate some onboarding tasks by assigning the new employee a mentor—someone who knows the ropes and can be a positive role model. Having a mentor also provides new employees with a “safe” person to go to with questions they don't want to bother you with or want to ask without jeopardizing your confidence.

▶ **Manager's Onboarding To-Do List**

Although some items can be delegated to a new employee's colleague or mentor, there are a number of tasks that you as a manager should accomplish over the employee's first 90 days.

▶ **New Employee Check-In Meeting Questions**

It's strongly recommended that you meet regularly with your new employee and allow time for questions, information sessions, and training. These sample questions give you a good starting point for what to ask as you continue to meet with your new employee and ensure their success.

▶ **New Employee Success Profile**

Success is sometimes hard to gauge, especially from a new employee's perspective. Use this profile to identify and share your expectations and vision of success for a new employee's first 30, 60, and 90 days. Talking about what success looks like helps your new employee set goals and priorities and can determine what on-the-job training may be needed.

▶ **Recognition Profile**

This tool allows you to solicit information so that you can ensure any recognition given is on target—meaningful, comfortable, and personal for the new employee. Sharing this tool also communicates that recognition is important to your work group and the UW.

▶ **Top Ways to Turn Off New Employees**

The “don't do” list to remind you of your role in the onboarding process.

SETTING THE STAGE

Consider the following steps to build a positive relationship with your new employee. The ideas below will ensure that the connection you build with your new employee is strong from the start.

- ❑ Send an official appointment letter outlining the specifics of the employee's position, including reporting relationship, salary, etc. For a sample letter go to: hr.uw.edu/wp-content/uploads/sites/4/2016/07/new_to_prof.doc
- ❑ If there is a long period of time between the offer and the start date, stay in regular communication with your employee. Send a packet of introductory information about your department and the University.
- ❑ Send an informal announcement to your department about their new team member and their background.
- ❑ Meet with department/unit HR or your payroll coordinator to know what paperwork a new hire needs to complete.
- ❑ Shortly before the start date, send your new employee an email or letter that includes the following:
 - ❑ Date and time to arrive the first day
 - ❑ What to bring on the first day (to complete the I-9 and W-4 forms, see: www.uw.edu/admin/payroll/pcguide)
 - ❑ Where to report and who to ask for upon arrival
 - ❑ Transportation and/or parking information
 - ❑ What to expect during the first days on the job (include a schedule of the first few days if possible)
 - ❑ What to wear
 - ❑ Options for lunch (better yet, arrange to take them out to lunch with you and/or a group of colleagues)
- ❑ Select one of your staff members to be a "mentor" for your new hire's first few months.
- ❑ Encourage the staff to send welcome emails to your new hire.
- ❑ Set up appointments with individuals that your new employee should meet.

► CONTINUED

- ❑ Set aside time in your calendar to make sure you're available for your new employee's first days and weeks.
- ❑ Set up new employee's workstation, including their desk and/or office computer. Provide your employee with a clean desk in a cubical or office that is in "move-in" condition.
- ❑ Include a welcome sign on the new staff member's door or workstation.
- ❑ Set up phone(s): Determine if your new employee will need a new phone, or have an existing one reconfigured. Also be sure that their [new voicemail box](#) is set up on the employee's first work day.
- ❑ Have building keys or other access methods ready.
- ❑ Make sure necessary supplies are available: Plan ahead to ensure that new employees have all the required office supplies on their first day, including pens, paper, post-its, message pads, office keys, etc.
- ❑ Order business cards if necessary/possible. UW Creative Communications has a [web-based ordering process](#).
- ❑ Make sure new staff members are added to appropriate email lists and calendaring systems.
- ❑ Create a first-week schedule for new employees so that they have something to do that is meaningful and helps them hit the ground running. The schedule should include a balance of time with others, down time, and time on their own to read orientation materials or complete other orientation-related tasks. Consider including some or all of the following:
 - ❑ One-on-one or small group meetings with other team members. During these meetings, team members might describe their work and how it integrates with the work the new team member does.
 - ❑ One-on-one meetings with you to discuss job description, performance expectations, appropriate attire, time and leave, etc.
 - ❑ Designated times for the new employee to review the [Online New Employee Orientation](#) and the [Benefits Orientation](#).
 - ❑ Time alone at their workstation so they can digest all the new information and make notes about what they've learned in meetings.
 - ❑ Tour of campus or larger work environment.

NEW EMPLOYEE CHECKLIST

TO BE FILED IN YOUR DEPARTMENTAL PERSONNEL FILE

EMPLOYEE _____ SCHOOL/VP AREA _____

SUPERVISOR _____ DEPARTMENT _____

▶ ACTION ITEMS FOR EMPLOYEE

- Find out your Employee Identification Number (EID): _____
- Find out your Employment Program: _____
- Complete Affirmative Action Data form: ap.washington.edu/eoaa/forms/aadf
- Sign up for New Employee Orientation and Benefits Orientation:
hr.uw.edu/ops/hiring/new-employee-onboarding
- Benefits Orientation scheduled for _____ (enroll in benefits within 31 days of start date)
- New Employee Orientation scheduled for _____
- Register for Sexual Harassment Prevention class:
ucs.admin.uw.edu/pod/Course/Details/PSH00
- Order University business cards (if applicable)

▶ INFORMATION COVERED IN NEW EMPLOYEE ORIENTATION

- UW organizational overview, including mission, vision, and culture
- Key policies and procedures, including working for a state university, and computer, email, and internet usage
- Workplace health and safety
- Human Resources, including WorkLife and Professional & Organizational Development
- UW amenities and events

▶ CONTINUED

▶ TOPICS TO BE COVERED BY DEPARTMENT/SUPERVISOR

SUPERVISORS: Check off items as you address them with your new employee. For a comprehensive list of items that you/your department are responsible for, visit this web page: hr.uw.edu/wp-content/uploads/sites/4/2016/07/V1_Newly-Hired-Classified-Professional-Staff-Checklist_2016.docx.

- Terms of employment (employment program/probationary period/salary)
- Job duties and performance expectations
- Performance appraisals
- Work schedules, breaks, and overtime
- Time and leave reporting
- Labor contract/dues obligation (if applicable) or Professional Staff Program for professional staff
- Paydays and how to arrange direct deposit
- Types of leave and accrual rates
- Requesting time off
- Function of department/organizational chart
- Interrelationships with other departments
- Building use and access/security
- Departmental Safety Plan
- Equipment use and access
- Reference Station Location
- Telephone use/etiquette/ voicemail/directory
- Email account and usage tips
- Emergency contact information
- Inclement weather procedures/polices

EMPLOYEE SIGNATURE

DATE

SUPERVISOR SIGNATURE

DATE

MENTOR CHECKLIST

▶ BEFORE NEW TEAM MEMBER STARTS

- Make sure work space is clean and complete, including computer, phone, trash can, etc.
- Obtain email address from payroll coordinator
- Set up mailbox
- Get copy of departmental handbook (if applicable)
- Arrange for any welcoming items or events (door sign, welcome reception, etc.)

▶ WEEK ONE

- Meet, greet on day one
- Walk around and tour key areas of facility
- Show work space/desk
- Introduce new hire to Employee Self Service and MyUW
- Introduce new staff member at meetings, breaks, lunch, etc.
- Review UW communication avenues
- Explain regular hours, break times
- Paydays are 10th and 25th of each month; direct deposit is encouraged
- Show how to check email
- Show how to use phones and check voicemail
- Have lunch with new staff member on day one
- Explain use of refrigerator, oven, microwave, dishwasher; we all clean up after ourselves; recycling
- Fire alarm and evacuation procedure
- Review and clarify all appropriate safety procedures
- Review the "Table of Contents" of department handbook (if applicable); encourage new member to read at later time
- Review all office equipment (copier, fax machine, etc.) and ordering of supplies
- Provide a list of acronyms typically used in your department.

▶ CONTINUED

▶ DURING THE REMAINDER OF MONTH ONE

- Schedule a 15-minute meeting once a week with new staff member to check in
- Review what has already been covered in the above checklist

▶ MONTH TWO

- Continue to hold weekly meetings, reviewing what has already been covered and adding new topics if needed
- Inform staff member of department business and social events; make sure staff member knows if family is welcome
- Remind staff member of advantages of working at UW, such as discounts/perks, IMA membership, cultural events

▶ MONTH THREE

- Continue to hold meetings—at least every other week. Review all that has been covered

▶ AT THE END OF SIX MONTHS (EVALUATION/TRIAL PERIOD, IF APPLICABLE)

- If/when the new staff member successfully completes trial period, ensure that this gets announced at the next staff meeting
- Buddy relationship may continue informally as desired or needed

MANAGER'S ONBOARDING TO-DO LIST

▶ DURING THE FIRST 30–60 DAYS

- ❑ Ensure that you have arranged for proper training for your new staff member
 - Topics include:
 - ❑ Phones
 - ❑ Computer hardware and software
 - ❑ Administrative computing systems
 - ❑ Departmental processes for getting work done
- ❑ Schedule regular meetings throughout the first several months
- ❑ Include meetings to check-in on employee separate from day-to-day work

▶ DURING THE FIRST SIX MONTHS TO ONE YEAR

- ❑ Regularly meet with new employees:
 - ❑ Set goals
 - ❑ Review performance
 - ❑ Give feedback
 - ❑ Ask for feedback
- ❑ Discuss professional development opportunities
- ❑ Conduct evaluation period/trial period formal review, if applicable
- ❑ Encourage your new team member to get involved with the UW community. Suggest that they talk to colleagues about campus groups, publications, and other professional activities and resources that are available and might be of interest.

NEW EMPLOYEE CHECK-IN MEETING QUESTIONS

NAME _____ TODAY'S DATE _____

POSITION _____ START DATE _____

How is your job going?

Is the job what you expected when you were hired?

What kind of surprises have there been?

Has your training been helpful? What training would you add?

Has the buddy program been helpful? Any changes to the buddy program?

What kinds of tools do you need to complete your work?

Do you understand where you are in terms of progress since you started work?

▶ CONTINUED

How are your relationships with your co-workers?

What kinds of things did you learn from in-person New Employee Orientation? Are there things you would have liked to have learned at New Employee Orientation?

What kind of improvements would you like to see in our department orientation?

Is everything going well with your benefits? Did you find benefits orientation to be helpful?

Are there any tools or resources we should be providing, but are not?

Are there any things you feel "out-of-the-loop" on?

Are there any things you do not have access to?

Is there anything you would like to tell me that I have not asked about?

NEW EMPLOYEE SUCCESS PROFILE

NAME _____ TODAY'S DATE _____

POSITION _____ START DATE _____

▶ POSITION SPECIFIC COMPETENCIES

- 1. _____
- 2. _____
- 3. _____
- 4. _____

(Use additional pages if there are more than four competencies to focus on in the first 90 days.)

▶ FIRST 30 DAYS

Success looks like...(what has employee learned or done?)

I or others will help our new employee achieve success by...

▶ FIRST 60 DAYS

Success looks like...(what has employee learned or done?)

I or others will help our new employee achieve success by...

▶ CONTINUED

▶ FIRST 90 DAYS

Success looks like...(what has employee learned or done?)

I or others will help our new employee achieve success by...

▶ ADDITIONAL GOALS AND TRAINING

Other goals for the new employee include...

I or others will help our new employee achieve success with these goals by...

Specific training needs or action plans to achieve the goals are...

**▶ Both the new employee and manager should initial and date this form.
Keep form in departmental personnel file.**

	30 Days	60 Days	90 Days
Manager's Initials	_____	_____	_____
Employee's Initials	_____	_____	_____
Date	_____	_____	_____

RECOGNITION PROFILE

Please complete this form to tell us about you. Share only what you are comfortable with.

NAME _____ TODAY'S DATE _____

POSITION _____ START DATE _____

BIRTHDAY (M/D) _____

▶ FAVORITES

Beverage _____

Book/Author _____

Color _____

Food _____

Hobby/Sport/Interest _____

Movie _____

Restaurant _____

Salty Munchie _____

Sports Team _____

Sugary Munchie _____

Type of Music/Artist _____

Most Avoided Foods _____

Family _____

My Hero _____

Pets _____

Collectables _____

▶ What are your personal goals (educational, travel, home-related, etc.)?

▶ What type of recognition or praise do you like best (public, private, written, verbal, formal)?
What types of recognition have been most meaningful to you in the past?

▶ What form of recognition motivates you the most (gift card, time off, candy, notes, flexibility)?

TOP WAYS TO TURN OFF A NEW EMPLOYEE

BY SUSAN M. HEATHFIELD

Source: humanresources.about.com

You want your new employee to experience their job as a major turn-on. So, why is it that organizations often act in ways that create the opposite result? Here are the top ways to guarantee your new employee will start off on the wrong foot—possibly forever.

▶ AVOID THESE

- Make sure a work area has not been created or assigned. (Let them sit in a hall or share a cube.)
- Schedule the new employee to start work while their supervisor is on vacation.
- Leave the new employee standing in the company reception area for a half-hour while reception staff try to figure out what to do with them.
- Abandon the new employee at their work station to manage on their own, while co-workers pair up and head out to lunch.
- Provide an hour in a noisy lobby for the new employee to read and sign-off on a 100-page Employee Handbook.
- Show the new employee their office and don't introduce them to co-workers or assign them a mentor.
- Assign the new employee to a staff person who has a major, career-impacting deadline in three days.
- Assign the new employee to _____ (you fill in the blank)—your most unhappy, negative, company-bashing staff member.
- Give the employee “busy work” that has nothing to do with their core job description, because you are having a busy week.