

Making Connections

UNIVERSITY OF WASHINGTON



explore



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ON-BOARDING TOOLKIT

for UW Managers

Dear Manager,

Congratulations on the successful hire of your new employee. We were honored to welcome them to the University culture at the “Making Connections” session (the UW's in-person new employee orientation).

We understand that this is the beginning for both you and your new employee; excitement is high and potential is endless! Key to carrying this momentum forward and optimizing your new employee's success is providing a suitable on-boarding experience. Research shows that providing on-boarding throughout an employee's first 90 days greatly increases employee retention and productivity.

We are certain that you have already completed a number of orientation activities for your new employee. In addition to those, we would like to give you a few more tools to help you successfully welcome, orient, and retain your new employee.

In about a month or so, we'll send you an additional tool to help you stay connected with your new employee and ensure his or her continued success.

Happy On-Boarding,

Professional & Organizational Development

■ **What is On-Boarding? On-Boarding is ...**

Getting your newly hired talent up to speed with the policies, processes, culture, expectations, and day-to-day responsibilities of your department/unit.

Making new employees feel welcome and excited, confirming why they joined your department/unit and the University of Washington.

■ **Why is On-Boarding Important? On-Boarding ...**

Builds UW's and your unit's/department's reputation for being a thoughtful employer, with great training, clear leadership, and a strong organization.

Helps to 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 for success for both you and your new employee is critical. This checklist provides some suggestions and ideas for you to begin building a strong connection with your new employee before their first day of work.

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This checklist outlines the initial information each new employee should receive. Having both you and your new employee sign the checklist, once everything has been covered, helps both of you feel confident that necessary information has been shared. In addition, keeping the signed copy on file provides an excellent record of what information was covered.

CHECKLIST FOR NEW EMPLOYEE'S BUDDY **4**

Orienting a new team member can be time consuming, but you can delegate some tasks by assigning the new employee a buddy or mentor—someone who knows the ropes and can be a positive role model. Having a mentor or buddy also provides new employees with a “safe” person to go to with questions that they either don’t want to bother you with or want to ask without jeopardizing your confidence.

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While delegating some things to a new employee's colleague works, there are some things that over the employee's first 90 days you should do.

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It's strongly recommend 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 his or her success.

NEW EMPLOYEE SUCCESS PROFILE **10**

Success for new employees is sometimes hard to gauge, especially from their perspective. This profile gives you the opportunity to determine and then share your expectations and vision of success for a new employee's first 30, 60, and 90 days. Having a conversation about what success looks like helps your new employee set goals and priorities and can help determine what on-the-job training, coaching, or mentoring may be needed.

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This tool allows you to solicit information from your new employee 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 **13**

This is definitely the “don't do” list. The list not only reinforces what on-boarding is all about, it provides a tongue-in-cheek way to remind you of your role in the on-boarding process.

The following indicator appears at the top of various documents in this kit. It shows when to use a specific tool — prior to the new employee's arrival, during the first 30, 60, or 90 days, or beyond the 90-day period.

NEW EMPLOYEE DAYS	< 0	0–30	30–60	60–90	90 +
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Setting the Stage

NEW EMPLOYEE DAYS

< 0

0–30

30–60

60–90

90 +

Accepting the offer to join your organization was likely a big decision for your new employee. Once an employee accepts a position, the days or weeks leading up to that first day are critical in building a positive impression and relationship. The ideas below will help 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 new position, including reporting relationship, salary, etc. For a sample letter go to:
<http://www.washington.edu/admin/hr/forms/index.html#hiring>
- If there is a long period of time between the offer and the start date, stay in regular communication with your new employee via e-mail. Send a packet of introductory information, about their position, your department and the university. You can also collect brochures and information about University programs and services to send to your new employee to review on his or her own time (for example, the IMA, the UW Club, UW Carelink, Husky Sports, the Burke Museum, the Henry Art Gallery, etc.).
- Send an informal announcement to your department about new hire's and their background.
- Meet with department/unit HR or payroll coordinator to ensure you know what paperwork a new hire needs to complete.
- Shortly before the start date, send your new employee an e-mail 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:
<http://www.washington.edu/admin/payroll/pcguide.html>)
 - Location to report to 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 the new employee out to lunch with you and/or a group of colleagues)
- Select one of your new employee's colleagues to be the new employee's "buddy" for the first few months on the job (see the buddy checklist in this toolkit). Send the new employee the name and contact information of the buddy so that they can be in touch.
- Set up appointments with individuals that your new employee should meet early on (colleagues within your organization and individuals that they will interact and work with).

- ❑ Set aside time in your calendar to make sure you're available for the first days and weeks of your new employee's tenure.
- ❑ Set up new employees' workstations, including their desk and/or office, computer, etc. First impressions count, so providing new employees with a clean desk in a cubical or office that is in "move-in" condition will be a positive step in this valuable and new relationship (see buddy checklist in this toolkit).
- ❑ You may want to include a sign on the new staff member's door or workstation welcoming your new hire to the team, or have flowers or a plant to make the workstation more inviting.
- ❑ 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 voice mailbox](#) is set up on the employee's first work day.
- ❑ Have building keys or other access methods ready.
- ❑ Have mailbox marked (if applicable).
- ❑ Make sure necessary supplies are available: Plan ahead to insure 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. Publication Services has a [web-based ordering process](#).
- ❑ Make sure new staff members are added to appropriate e-mail 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 On-Line New Employee Orientation and the Benefits Orientation.
 - Meetings with other key colleagues.
 - 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.

Manager Checklist for New Employees

NEW EMPLOYEE DAYS

< 0

0-30

30-60

60-90

90 +

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:
<https://prp.admin.washington.edu/AffirmativeAction/UWNETID/AAform.asp>
- Sign up for New Employee Orientation and Benefits Orientation:
<http://www.washington.edu/admin/hr/roles/newee/orient/areas/seattle/staff.html>
Benefits Orientation scheduled for _____ (enroll in benefits within 31 days of start date!)
In-person New Employee Orientation scheduled for _____
- Register for Sexual Harassment Prevention class:
www.washington.edu/admin/hr/roles/newee/orient/sexharassprevent-trng.html
- Sign up for New Employee Coffee Hour (optional): www.washington.edu/admin/hr/pod/newees/coffeehour.html
- Order University business cards (if applicable)

INFORMATION COVERED IN NEW EMPLOYEE ORIENTATION (IN-PERSON AND/OR ONLINE)

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

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 www.washington.edu/admin/hr/forms/employment/chklsts/newee.pdf (bookmark this page or save to your favorites for future reference).

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

Employee's Signature _____ Date _____

Supervisor's Signature _____ Date _____

COPY TO EMPLOYEE

Checklist for New Employee's Buddy

NEW EMPLOYEE DAYS

< 0

0–30

30–60

60–90

90 +

BEFORE NEW TEAM MEMBER STARTS

- Work space clean, including computer, phone, trash can, etc.
- E-mail 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 the 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:
 - Mailbox
 - *UWeek*
 - Department newsletter
 - Other regularly scheduled key meetings
 - E-mail
 - Internet
 - Staff/department/unit meetings
- Explain regular hours, break times
- Paydays are the 10th and 25th of each month; direct deposit is encouraged
- Show how to check e-mail
- 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 welcome/department orientation handbook (if applicable); encourage new staff member to read entire handbook when he or she has time
- Show how to use Employee Self Service and MyUW on the Web
- Review all office equipment (photocopier, fax machines, etc.) and ordering of supplies
- Provide a list of acronyms typically used in your department. You may be surprised how "foreign" UW speak can sound to a new employee.

DURING THE REMAINDER OF MONTH ONE

- Schedule a 15-minute meeting once a week with new staff member to check in on “how it’s going,” etc.
- Review what has already been covered in the above checklist

MONTH TWO

- Continue to hold the weekly meetings, reviewing what has already been covered and adding new topics as needed
- Inform staff member of department business and social events; make sure staff member knows family is welcome if appropriate
- Remind staff member of advantages of working at UW, e.g., employee discounts/perks, IMA and wellness program, educational and cultural events and activities, etc.
- POD conducts New Employee Coffee Hour every other month; employee is strongly encouraged to attend (buddy can attend with the new employee)

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 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

NOTES

Manager's On-Boarding To Do List

NEW EMPLOYEE DAYS

< 0

0-30

30-60

60-90

90 +

DURING THE FIRST 30 TO 60 DAYS:

- ❑ Ensure that you have arranged for proper training for your new staff member (some positions require more than others). Much of the training that is needed will more than likely be done by you or an employee in your department one-on-one with the new employee. Professional & Organizational Development (POD) provides training classes such as *Designing and Delivering Dynamic Training*, *Essential Training and Coaching Skills*, and *Designing Employee Orientations for Your Department* to help individuals become effective on-the-job trainers and on-boarders. Some departmental training topics might include:
 - Phones
 - Computer hardware and software
 - Administrative computing systems
 - Departmental processes for getting work done
- ❑ It may also make sense to have your new employee take training classes through POD or UW Computer Training.
- ❑ Continue meeting with your team member on a regular basis. The first week for a new employee is often full of meetings, information gathering and tours. However, your new employee will still feel "new" for some time, so it's important that you keep in touch with him or her and continue to structure some time for questions, information sessions, and training. We've provided sample questions to ask your new team member at these meetings (see New Employee Check-In Meeting Questions on the next page).

DURING THE FIRST SIX MONTHS TO ONE YEAR:

- ❑ Regularly meet with new employees to set goals, review performance, and give feedback. Also, ask for feedback about how things are going and if they're getting the support they need from you and others.
- ❑ Ask new employees if there are learning and professional development opportunities of interest to them. Discuss which opportunities may be appropriate .
- ❑ Conduct evaluation period/trial period formal review, if applicable.
- ❑ Encourage your new team member to get involved with the 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

NEW EMPLOYEE DAYS

< 0

0-30

30-60

60-90

Name _____ Today's Date _____

Position _____ Start Date _____

How is your job going?

Is it what you expected when hired?

Any surprises? If yes, what...

Has the training been helpful?

What training would you add?

Has your buddy been helpful?

Any changes you would suggest for the buddy program?

Do you have all the work tools you need?

Do you know where you stand in terms of your progress since you started work?

How are your relationships with your co-workers?

Was the in-person New Employee Orientation (Making Connections) helpful?

Was the on-line New Employee Orientation helpful?

Was New Employee Coffee Hour helpful?

Is there room for improvement with the New Employee Orientation and the Coffee Hour?

Is there room for improvement in the department?

Was Benefits Orientation helpful? Everything OK with your benefits?

Any questions/anything unclear?

Is there something we should be providing and we are not?

Is there anything you feel out of the loop about?

Anything you need that you don't have access to?

Any suggestions?

Any needs?

Anything you would like to tell me that I have not asked you?

Schedule time to meet within the next two weeks.

Source: Adapted from "20 Questions With Connie," generously provided by Northeast Delta Dental, winner of Fourth Best Company to Work for in America and Business NH Magazine's Best Company to Work for Hall of Fame.

New Employee Success Profile

NEW EMPLOYEE DAYS

< 0

0-30

30-60

60-90

Name _____ Today's Date _____

Position _____ Start Date _____

POSITION-SPECIFIC COMPETENCIES

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

Use additional pages if there are more than 4 competencies to focus on in the first 90 days.

FIRST 30 DAYS

Success looks like ... (What will the new employee have learned or done?)

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

FIRST 60 DAYS

Success looks like ... (What will the new employee have learned or done?)

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

FIRST 90 DAYS

Success looks like ... (What will the new employee have 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

NEW EMPLOYEE DAYS

< 0

0-30

30-60

60-90

90 +

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

Name _____ Position _____

Today's Date _____ Start Date _____ Birthday (Month/Day) _____

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 or someone I admire
Pet type/breed/name
Collectibles/other ideas

- 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, informal)?
It may help to think about recognition you received in the past that you found particularly meaningful.

- What form of recognition motivates you the most (gift card, time off, chocolate, coffee, tea, meaningful note, more flexibility/opportunity)?

Source: Adapted from www.recognitionworks.net,
Bucket Filling Interview, and Clark Nuber's form

Top Ways to Turn Off a New Employee

by Susan M. Heathfield

NEW EMPLOYEE DAYS

< 0

0–30

30–60

60–90

90 +

You want your new employee to experience his/her new 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 ten 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 him sit in a hall or share a cube.)
- ☒ Schedule the new employee to start work while her 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 him.
- ☒ Leave the new employee at her work station, to manage on her own, while coworkers 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 his office and don't introduce him to coworkers or assign him 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.
- ☒ Assign the employee “busy work” that has nothing to do with her core job description, because you are having a busy week.

Source: <http://www.humanresources.about.com>