

**Succeed@USFSP: A Personalized
Onboarding Program for New Employees**



**Managers' Guide: Tools, Templates and
Checklists**

USFSP Mission: Inspire scholars to lead lives of impact



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Getting Onboard

Congratulations on your new hire! The new employee's first days, weeks, and months are filled with new information and lots of questions. To help with their learning and build connections, we have put together what we think the new employee may need or want to know. To that end, the onboarding program is a collaborative effort of many to accelerate the success of the new employee. The purpose of the onboarding program is to welcome staff to USF St. Petersburg and provide them with the resources and learning they need to excel. Big things like a formal onboarding program and the little things like greeting a new employee warmly, taking him or her to lunch, and providing a functioning workstation on Day 1—matter. An effective onboarding program is critical for the following reason:

- ◆ To help new hires feel that they are part of a larger organization and they are integral to the success of the academic mission of USFSP and the USF System
- ◆ To communicate the culture of the organization so that the actions and decisions of new employees are more in alignment with University practices and help the organization function more smoothly
- ◆ To expedite learning and getting new hires up to speed so they have a strong start in the unit and at USFSP

Objectives

This program provides a six-month plan to help new employees onboard successfully. It includes information about USFSP & the USF System, links to key documents and websites, as well as roles and responsibilities for the supervisor, new employee, and the onboarding partner. As a result, the new employee:

- ◆ Feels welcomed upon arrival and is introduced to an organized and friendly environment
- ◆ Has a consistent learning experience - more than just information sharing
- ◆ Understands expectations (job, unit and manager) and develops a good working relationship with his or her manager
- ◆ Feels connected to the larger organization, experiences a sense of "community" and builds strong working relationships
- ◆ Learns the mission, vision, and values of the of USFSP and the USF System
- ◆ Completes goal-setting and development plan, and establishes regularity for coaching, insights, and feedback

Objectives for Successful Onboarding

The Onboarding Plan - An Overview

Before the First Day

The key success factor is to:

- Prepare for new employee's arrival

The manager is to ensure that the following have been completed

- Send offer letter to Human Resources
- Confirm with employee start date, work place, start time, 1st day contact person/number
- Ensure new employee has completed background check and new hire paperwork
- Office set up and request for computer, phone, keys, etc.
- Identify mandatory trainings
- Assign onboarding partner
- Initiate 90-day onboarding plan
- Create an internal announcement—see [sample announcement](#)

Within the First Week

The key success factors are for the employee to:

- Learn way around
- Get to know colleagues
- Learn about the department's mission, vision, values, and culture
- Begin plan for success

Highlights include:

- Clarifying first week's schedule and complete new hire paperwork
- Having the necessary tools for work, space set-up
- Reviewing job description, outline duties, and expectations
- Attending mandatory trainings
- Utilizing onboarding partner to learn about the department and the University
- Beginning regular 1:1 meeting with supervisor.

Within First Three Months

The success factors for the employee are

- Continue to get to know colleagues
- Continue plan for success
- Learn about USFSP's mission, vision, values, and culture

Highlights include:

- Integration into the team
- Learning about USFSP's mission, vision, values, and culture
- Establishing performance goals and expectations with supervisor and understanding the staff performance management process
- Continuing to work with onboarding partner to identify other network partners and key stakeholders in the organization

Within First Six Months

The supervisor, new employee and onboarding partner wrap up any left over items in the onboarding plan which includes:

- Meeting with supervisor for reality check
- Attending a new employee orientation group session
- Continuing meeting with stakeholders
- Beginning to work independently
- Having a development plan in place
- Reviewing performance review process and probationary period
- Filling out onboarding survey

Onboarding Team Roles: An Overview

An onboarding team should consist of the Hiring Leader, a carefully selected Onboarding Partner and the New Employee. Department Administrative Contact and Human Resources also play support roles by providing templates and offering and offering consultation. This chart documents the role that each plays.

| Department Administrative Contact and HR Support | Hiring Leaders | Onboarding Partner | New Employee |
|---|---|---|--|
| Department Manager - Provide tools; assist hiring leader to create the onboarding plan | Create a personalized onboarding plan (i.e., identify onboarding partner, valuable onboarding activities, events and key stakeholders.) | Work with the Hiring Leader on creation of personalized onboarding plan (i.e., identify valuable onboarding activities, events and key stakeholders). | Listen and brainstorm ideas that you think will help you learn your new role. |
| Work with Hiring Leader to ensure office space and system access are provided, as well as other logistics | Coordinate Pre-Arrival contact for first or second day of new team member | Serve as onboarding partner for new team member for 1— months | Build relationships. |
| Dept/College HR - Provide consultation and tools; and facilitate process | Ensure office space and system access and provided Day One. Oversee other pre-arrival logistics. | Help the new team member navigate the organization. | Be open to learning about the culture. |
| USFSP HR—Provide consultation, tools and training | Check in with new employees to make sure they have what they need on their first day as well as again when new questions arise | Provide insight about the culture and how the organization works. | Ask questions to ensure and understanding of charge and role. |
| | Assist new team member with integration into peer group | Connect the new team member to peers and key stakeholders. | Work with Hiring Leader and colleagues to determine and clarify performance measures. |
| | Establish time-based milestones to check in with new employees to see how things are going. For e.g., 30, 60, 90, and 180 day milestones are good markers to consider | Meet regularly to touch base and check progress. | Proactively participate in the onboarding process by supporting the creation and execution of the onboarding plan. |
| | Review Performance management process and expectations. | Ensure new team member has necessary resources; provide contacts. | Seek multiple points of view. |
| | Maintain open lines of communication and collect feedback about the onboarding process. | Provide support on systems and process questions until training is completed. | Learn about Vision 2020 Strategic Plan and the goals and objectives |

Onboarding Partner Guide

Characteristics of an Onboarding Partner:

- Open, friendly and trustworthy personality
- At least one year at USF St. Petersburg
- Successful in performing his or her own responsibilities
- Compatible work schedule and location with the new employee

Responsibilities of the Onboarding Partner:

- Partner with the hiring leader in the creation of the onboarding plan
- Have a First Week lunch/meal break with the new team member
- Establish and build rapport with the new employee
- Have a check-in meeting with the new team member weekly for the first month
- Check in every other week, Months 2-3 - determine frequency
- Make introductions to peers and colleagues
- Help the new employee understand and adapt to college and unit/department culture
- Participate in/lead activities as described in the onboarding plan (tours , meeting introductions, shadowing, information sharing, etc.)
- Act as an informational resource and answer questions as needed

Onboarding Partner Events - Content/Discussion Guide

Initial Lunch Meeting - Week One

This is an opportunity to build a relationship with the new team member. The content should be comfortable and relational. Use this opportunity to get to know each other and build rapport.

- Ask questions to learn about new employee's life and career
- Identify point of connection
- Describe your role
- Discuss process/schedule for future meeting:
 - Meeting frequency and times
 - Determine where future meetings should take place
 - Establish who initiates future unscheduled meetings; let him or her know that he or she is welcome to schedule meetings when needed
 - Discuss communication preferences for both of you: phone, e-mail, face-to-face, shorter more-frequent "check-ins" or longer less-frequent formal meetings, etc.

Onboarding Partner Guide Cont'd

Subsequent Check-in Meetings

Topics could include:

- Navigating the organization
- Training gaps - is there something the new team member would like more information on? Something that you can support him or her in working on or learning? Training class suggestions? Can you point him or her in the right direction? - Check in on whatever is identified in future conversations.
- Policy/procedure questions
- Hidden benefits at USFSP & the USF System - do you know of the great things going on that the new employee may not know about?
- What is working and what isn't?
- Is he or she meeting the right people to be successful
- General listening

Tips for Onboarding Partners

Do:

- Listen
- Share lessons learned and mistakes made
- Be patient: It takes time to develop a relationship
- Act as a sounding board
- Model good time management and organizational skills
- Accept the differences in people
- Offer non-judgmental feedback
- Be positive
- Empathize
- Remain flexible
- Try to identify the new leader's personality and communication style and adapt accordingly
- Ask for help from the hiring leader if you need to

Don't

- Worry about being perceived as the expert. Focus your attention on the new employee and be a resource where you can be
- Talk negatively about the new employee to anyone or about anyone else to the new team member

Thank you for your investment in the success of this new employee!

Hiring Leader Conversation Guide

Building an early connection to a new team member and spending time to develop a strong relationship will help build trust that is required for long-term effectiveness. As a hiring leader, you cast an important shadow over all of those who report up to you. Your level of attention and involvement in the onboarding process of new employees in your area will help to shape their level of engagement and investment in the organization. A combination approach of formal/scheduled meetings and informal conversations should be implemented. Checking on the status of a new employee on a regular basis is a proactive way to uncover potential barriers to successful onboarding and improve their experience.

Plan on scheduling your first formal meeting during Week One. The following guide offers suggested talking points for meetings and rounding questions. Choose from these suggestions to create a plan that works best for you and the new employee.

Note: Formal one-on-one meetings are suggested as a best practice to occur on an ongoing basis

Introduction Day: Day 1/Week 1 - Talking Points

The **topics/objectives** of the first meeting throughout Week 1 are to

- Welcome the new employee to the department
- Begin to build a positive working relationships
- Reinforce the new employee's strengths (confirm why he or she was selected)
- Collect feedback on the process thus far (pre-employment process, orientation, introductions, initial impressions)
- Discuss the onboarding approach, introduce onboarding team and onboarding plan
- Provide a clear picture of job/performance expectations including why the responsibilities are important to the organization and how they relate to the success of the role
- Share expected timeline to job proficiency
- Discuss expectations (both theirs and yours) related to:
 - ◇ *Day-to-day operations - written and unwritten including leadership style*
 - ◇ *Teamwork, cooperation and communication*
 - ◇ *Work flow - typical time frames and headlines for work completion*
- Enhance organizational connection
- Reduce new employee anxiety
- Promote communication
- Provide introductions to the correct resources/training
- Answer questions

Subsequent Meetings: Post Week 1

There are many topics that will need to be visited and revisited over the first few months with new employees. Some of the meeting content listed below can be delivered by the hiring leader, the Onboarding Partner and the team.

Multiple meetings may be needed over several weeks. Trying to load the first few days with information can make it difficult for the new employee to retain the information. Consider prioritizing key information and spreading out the delivery over the first month to 90 days. The onboarding process should continue through the first year.

An informational packet will also help new team members learn processes/procedures and will provide good content for hiring leader and Onboarding Partner meetings.

Hiring Leader Meeting Conversation Guide Cont'd

Integration: Month 1 Topics to Review

Suggested **topics** to cover throughout month one include:

- Background: department/college history, mission, vision, values
- Discuss unit strategic goals
- Leadership style (communication)
- Distribute department organizational charts (or confirm that one was received in orientation) and discuss
- Distribute and review department/unit norms, codes of conduct, values
- Discuss department/unit culture-sharing information that may help the new team member succeed within it
- Review how to access policies and review key policies

The **objectives** of the first month are to:

- Strengthen the bond between new employee, the hiring leader and the team
- Allow the employee the opportunity to share outside perspective of the organization that may help us grow
- Develop an effective network that will help the new employee to succeed

Remember to be open to feedback and assume a non-defensive approach during these discussions.

Growing Competence

The **objectives** of the second and third months are to:

- Make sure the new employee has developed a clear progression of increased responsibilities
- Review the performance management process
- Identify any early transition issues
- Encourage increased independence (more questions will arise as new employee works independently)
- Check in with both the new team member and the Onboarding Partner to be sure the relationship is established and strong
- Assess the level of employee engagement
 - Appropriate level of interaction with Onboarding Partner/buddy/mentor
 - Support from all teammates
 - Support from you
 - Ask: How do you feel when you leave at the end of the day?
- Provide performance feedback
- Survey the new employee to make sure his or her onboarding is successful process

New Hire Announcement

New hire announcements should be sent on or before the new employee's start date. The announcement should make the team and key colleagues aware of the new team member while at the same time making the new employee feel welcomed and valued.

Whenever possible, announcements should include:

- Job title and starting date
- Primary responsibilities/ a brief summary of new team member
- If applicable, whom the new employee is replacing
- Supervisory duties and reporting structure (if applicable)
- Professional background
- Educational background
- Physical location of new employee's office

A couple of things to consider:

- **How** the new hire announcement should be made. Does the department rely on e-mail for announcements and news? Is there a monthly update or monthly newsletter that goes to your department? Does your department have an announcement board?
- **Share** the announcement with the new team member ahead of time, ensuring he or she is comfortable with the communication and that all details are accurate.

Dear Colleagues,

*I am pleased to welcome (**insert first and last name**) to our team. Beginning (**insert start date**), (**insert first name**) will be responsible for (**brief overview of basic responsibilities**). He/she will have management responsibility for (**units/teams**).*

*Prior to accepting this position, he/she served as (**list titles/responsibilities in one or two previous positions**) at (**previous employer**).*

*(**First name**) graduated from (**university name and location**) with a degree in (**major**) and has a (**graduate degree, if applicable**) from (**university name**).*

*(**First name**) brings experience and a record of success in the (**professional field**), and I believe that he/she will be a valuable addition to our team and to the (**name of department or center**).*

*It is up to all of us to help (**name**) feel like part of the team, so please introduce yourself and make him/her feel welcome.*

*Regards,
(Hiring Leader Name)*

Welcome Letter

A welcome note can be sent to a new team member after he or she accepts an offer. This communication should make the new employee feel valued, create enthusiasm and make him or her more comfortable on the first day to get things started on the right foot.

This example provides a starting place for your welcome note.

Dear (First name),

Welcome to the University Of South Florida St. Petersburg. I am delighted that you will be joining our team!

As (insert role/title), you play a vital role in fulfilling our strategic goals. Your strong background in (highlight past experience and strengths that lead to selection) will be valuable to us as we work toward (highlight specific area goals).

We want to support you as you build the knowledge required for success by helping you learn the processes, people, vision and culture of the (name of department or center). To that end, we are currently putting together a personalized onboarding plan for you that I will review with you during our first meeting.

We look forward to your arrival!

*Sincerely,
(Hiring Leader Name)*

Manager's Onboarding Checklist

BEFORE Start Date

Work Space

Assigned to:

| | |
|--|--|
| | Call your new employee and confirm: start date, work place, start time, first day contact person |
| | Provide Transportation and Parking information |
| | Email follow-up with link to New Employee Onboarding webpage |
| | Inform the employee about the New Employee Onboarding Program |
| | Discuss relocation support provided by the department (if applicable) |

Create Action Plan/Welcome Packet

Assigned to:

| | |
|--|---|
| | Put together welcome packet from the department and include: |
| | Job Description |
| | New Employee Onboarding Checklist |
| | Leave accrual and reporting guidelines, department procedures for requesting sick/vacation time |
| | Procedures handbook (if available) |
| | Schedule for the first week |
| | Department/unit organization chart |
| | Contact information for co-workers in the department |
| | Map of campus with building(s) highlighted |
| | Mission/Vision and guiding principles for USFSP and department/unit and how this employee's work supports our mission |
| | Information on pay statements and direct deposit/Probationary information (if appropriate) |
| | Confidentiality Information |
| | HIPPA and FERPA information (if appropriate) |
| | Campus Computing Acceptable Use Policy |
| | Information on eDisclose and Conflict of Interest Policy |

Making Connections

Assigned to:

| | |
|--|--|
| | Notify colleagues in your department of the new hire (include start date, what their job will be and employee bio) |
| | Identify a coworker to be a resource for the new employee |
| | Arrange a campus tour sometime in the first week or two |
| | Set up meetings with key personnel |

Manager's Onboarding Checklist Cont'd

Human Resources

Assigned to:

| | |
|--|--|
| | Contact your HR Partner and add new employee to onboarding hiring calendar |
| | Confirm with HR that they have received all recruitment paperwork for the new employee |
| | Make sure you have submitted the Letter of Offer |
| | Confirm background check |

Work Space

Assigned to:

| | |
|--|---|
| | Order basic office furniture and supplies (desk, chair, bookshelf etc.) |
| | Order computer if needed and have all relevant software installed |
| | Schedule phone installation and assign a phone number |
| | Clean the work area |
| | Order business cards, name tag, and name plate |
| | Verify that the employee's workspace is prepared |

Technology and Access

Assigned to:

| | |
|--|---|
| | If temporary computer access is needed prior to the start date, request a sponsored account in advance for the employee |
| | Consider software needs of the job such as: Daily software needs, Printer connections, Departmental portal and network access |
| | Submit P-Card and travel card requests (if necessary) |
| | Arrange pertinent trainings required for the job (examples include): Banner, GEMS, etc. |
| | Enroll the employee in the New Employee Briefing program through HRP-card and travel card requests (if necessary) |

Training & Development

Assigned to:

| | |
|--|---|
| | Arrange pertinent trainings required for the job (examples include): Banner, GEMS, FAST, etc. |
| | Enroll the employee in the New Employee Briefing through HRP-card and travel card requests (if necessary) |

Manager's Onboarding Checklist Cont'd

First Day

Department Onboarding

Assigned to:

| | |
|--|--|
| | Welcome them upon arrival. Make the first day special |
| | Arrange to have lunch with the new employee on their first day |
| | Give them the department welcome packet |
| | Review welcome packet and take time to discuss contents (see 'Before Start Date' checklist for contents) |
| | Review work expectations, process for reporting sick leave, sick child, time off requests |
| | Provide overview of the schedule for the first day and work week |
| | Review Onboarding timeline (this document) with employee |
| | Review Trial Service Period (if applicable) |
| | Introduce them to department and team members |
| | Introduce them to a member of their department who can act as a resource |
| | Show them where to find: restrooms, elevators, stairs, exits, kitchen area, lockers/closets, etc. |
| | Confirm they received building access cards/keys |
| | Review FERPA and HIPPA guidelines (if applicable) |
| | Take the new employee to HR to complete their New Hire Paperwork |

Human Resources Onboarding

Assigned to:

| | |
|--|--|
| | Assist the employee in signing up for: |
| | USF Net ID |
| | USFSP Email and USFSP Alias Email |
| | Signing into GEMS self-service |
| | Banner |
| | MoBull |

Manager's Onboarding Checklist Cont'd

First Week

Check In

Assigned to:

| | |
|--|--|
| | Overview of software and other technology, confirm they have to set up email signature |
| | Review phone policy and long distance |
| | Review the Computer Acceptable Use Policy |
| | Introduce them to the office computer network (shared files/drives) |
| | Show them how to use the copier and other relevant office equipment |
| | Review welcome packet and take time to discuss contents (see 'Before Start Date' checklist for contents) |
| | Assist the employee in accessing the appropriate USFSP systems |

First Two Weeks

Check-in

Assigned to:

| | |
|--|---|
| | Inquire how first week went and make time to listen to any questions |
| | Review training schedule |
| | Verify that computer, network systems, printer, email, telephone, voicemail, etc. are working |
| | Discuss work and communication styles |
| | Review organizational chart and discuss information and work flows in the unit and beyond |
| | Discuss USFSP's Vision, Mission and Values |
| | Review key USFSP/Departmental policies |

First Month

Check in

Assigned to:

| | |
|--|--|
| | Establish weekly or bi-weekly meetings |
| | Answer their questions and help foster engagement with organization |
| | Check in about benefits and pay statements to see if they have any questions |
| | Review job description and see if there are any questions |
| | Discuss process for performance reviews; set short-term and long-term goals. |
| | Check in with department resource/mentor for their perspective |
| | Follow up with employee to confirm completion of eDisclose |

Manager's Onboarding Checklist Cont'd

First Three Months

Check-in

| | |
|--|---|
| | Ensure the employee is progressing in the responsibilities |
| | Check to see if employee is making progress in meeting with stakeholders and working with onboarding partner as necessary |
| | Review performance management process |
| | Begin discussion on goals, projects, deliverables, and a development plan |
| | Observe and support employee's integration into team |
| | Engage with employee and answer questions and help foster engagement with the University |
| | Review Hiring Manager Conversation Guide for further ideas |

First Six Months

Check in

| | |
|--|--|
| | If employee is in a Staff position, submit official Performance Review for staff. This is to be completed within the 30 calendar day period prior to the end of their probationary period |
| | Discuss and determine performance goals for the next appraisal period for staff. If new employee is Administration, continue to do performance check-in. Provide coaching, performance feedback, and insights. |
| | Check to see if employee feels supported by team and you |
| | Review Hiring Manager Conversation Guide for further ideas |
| | Fill out New Employee Onboarding Survey for Managers |