

Manager's Resource Guide

For On-boarding New Employees



PORTLAND PUBLIC SCHOOLS DISTRICT

Human Resources Department

501 N. Dixon

Portland Oregon 97227

HIRING MANAGER'S ON-BOARDING INFORMATION PACKAGE

While much emphasis is placed on the recruitment and selection process, many organizations fail to nurture the employer/employee relationship once the job offer has been accepted. Because first impressions are so significant, the failure to properly onboard new employees can be detrimental to your new employee's future performance, and can result in your new hire quickly becoming disillusioned in his/her new position or even leaving for another opportunity.

How *you* treat impressionable new employees is critical. Creating conditions that make them feel like a welcome part of your team immediately, will increase the likelihood that they will stay with the company. This package contains suggestions and guidelines on what you can do in the first few weeks of a new employee's service, to help him or her succeed and make a smooth transition into the District. Here is the link to Human Resources New Employee Webpage where you will find helpful information to assist with the on-boarding process: <http://www.pps.k12.or.us/departments/hr/8576.htm>

Employee Name: _____

Department/Position: _____

Direct Manager: _____

Start Date: _____ **90 Day Review Date:** _____

Assigned On-boarding Partner: _____

Check off all resources used:

- On-boarding Checklist
- The On-boarding Partner Program
- Partner Handout: Nomination Form
- Partner Handout: Getting Started
- Partner Handout: Evaluation Form
- 90 Day New Employee Survey

MANAGER'S ON-BOARDING CHECKLIST

PRE-EMPLOYMENT – IMPORTANT STEPS TO TAKE BEFORE YOUR NEW HIRE ARRIVES

- Identify an on-boarding partner for the new hire within your department and meet with him/her to discuss their role and some background on the new hire.
- Arrange for a box of office start-up supplies for new employee to be delivered to their desk, if applicable (stapler, staples, paper, pens, paperclips, etc.).
- Prepare an orientation agenda/1st week schedule for new hire based on the following checklist.
- Ensure workspace is set-up and workspace is clean.
- Order basic office furniture and supplies (desk, chair, bookshelf etc.)
- Send out an e-mail to everyone in the office so they are prepared to welcome the new employee.
- Get the new worker a security badge, keys or anything else they will need to enter the building each day, assuming the background check has been cleared.
- Provide a nameplate on his or her desk or office door as a tangible sign that you've prepared the space.
- Set up the computer.
- Consider software needs of the job such as: Daily software needs Printer connections
- Configure the new employee's email accounts.
- Provide guides and/or for any necessary software he or she will be using.
- Set up his or her phone system, and provide instructions for using voicemail.
- Make a list of key contacts that the new hire will be working with, set up staggered, short meet, and greet meetings.
- Put up a list of key documents in the new hires cubicle or office (organizational chart, contact list, office map, etc.).
- Verify that the employee's workspace is prepared.

DAY 1- IMPORTANT STEPS TO TAKE ON YOUR NEW HIRE'S FIRST DAY

Do not make day one all about paperwork. Instead, prioritize interpersonal relationships with key colleagues.

- Introduce the new employee to the rest of department (Best practice: organically walk around and meet; Alternative: call a quick meeting) and show employee where they will be sitting.
- Show the new employee their work area and provide a tour of the facilities (kitchens, bathrooms, photocopiers, supplies, emergency exits).
- Order business cards (if applicable).
- Introduce them to their assigned "on-boarding partner" (a co-worker who has mastered important skills and is also very knowledgeable on the company) and explain the On-boarding Partner Program. The on-boarding partner can take him to lunch the first day, give him/her a guided tour, help train him/her, help him/her get to know others, and answer questions on all sorts of little things that come up.
- Provide the new employee with temporary access pass/keys and prepare paperwork to get them permanent pass/keys.
- Review emergency procedures, what to do in case of an accident, and other safety issues and guidelines.
- Review the late or absence procedures, department process for requesting time off and leave accrual usage guidelines.
- Provide employee listing with titles and phone numbers (organizational charts for the District and Department/Unit, if applicable).
- If they don't come up naturally, here's a list of questions you should answer for your new employee voluntarily:

What should he or she bring? (Telling them to bring two forms of ID to verify paperwork is a good idea.)

Where should he or she park?

Whom should he or she ask for in the lobby?

Where are the restrooms?

Where is the copy machine? (In addition, how does it work?)

Where is the cafeteria?

A new employee's immediate supervisor should also be present on the first day. "The worst thing you can do is have new hires show up when their immediate supervisor isn't there for three or four days

DAYS 2-5- IMPORTANT STEPS TO TAKE WITHIN THE FIRST FEW DAYS

- Review the following policies (from the Employee Handbook that was mailed beforehand or is accessible online) with each new employee to ensure understanding, answer any questions and explain how each policy is observed within your department's work/team:
 - Conflict of interest
 - Respect in the workplace
 - Client relations
 - Dress code
 - Punctuality and absenteeism
 - Scheduling vacation
 - Online timesheet (if applicable)
 - Confidentiality & personal information
 - Probationary period (if applicable)
 - Standards of conduct
 - Hours of work
 - IT policies – back-ups, security, etc.
 - Any other relevant policies

Define the job accurately and completely, and be sure the employee understands their responsibilities. Although the employee may have seen a job description during the hiring process, it is time to go over it in detail. What does it *mean* and how does their position affect others?

- Assign a manageable task within the first week to ensure they are not left doing nothing when there are gaps in the orientation. Make the job as manageable as possible, and make conditions as predictable and as controllable as you can, until the new employee gets the rhythm of his or her work in your company. Be prepared to help the new hire sort priorities, at first.
- Help the new employee understand the company's unique culture. What's the dress code? When and how do people take lunch and other breaks? When and how do they get together to meet or solve problems? How strict are policies? How involved are employees in company-sponsored teams and events? Do people go out together after work?
- Introduce the new hire to any additional people he or she will be working with—inside and outside of the organization.
- Review the departmental reporting structure with the employee and how the team communicates (i.e. meetings, company portal, etc.).
- Explain the new employee's role in your department and in the company at large. Why is his/her work so important? What special contribution will he/she be making?
- Explain what training and development will be available to help him or her master skills. (Then be sure the new hire *gets* that training, as soon as possible, and be prepared to do some coaching)

afterward, to confirm correct performance and correct what needs to be improved.)

- Make performance standards clear, and let the employee's know how his or her performance will be measured. Discuss any probationary review timing. Give feedback immediately on how he or she is doing: Better or faster than you expected? Good enough for now? When will the quantity or quality need to match that of other employees? Be observant, so you can "catch" the new employee doing something right and comment on it, specifically! Positive feedback is a very powerful tool to motivate and reinforce; it trains the employee to give you *more* of the behavior you're looking for.



THE ON-BOARDING PARTNER PROGRAM

WHAT IS THE ON-BOARDING PARTNER PROGRAM?

The On-boarding Partner Program matches new employees with experienced staff members for their first few months of employment. This relationship is intended to:

- Provide the new employee with a point of contact for general inquiries regarding day to day issues—both formal and informal. *This includes information about policies, dress code, work rules, and other workplace issues in which the new employee might experience uncertainty.*
- Foster a comfortable relationship in which the new employee can access someone who is familiar with the corporate culture, norms, and expectations of the company.

WHAT IS AN ON-BOARDING PARTNER?

New employees often experience confusion and uncertainty as they strive to learn the “ins-and-outs” of a new workplace. An on-boarding partner is someone who offers advice and guidance throughout this introductory period and by doing so, helps the new employee integrate into the workplace with ease and confidence. These efforts help reduce the “outsider” feeling that a new employee may experience while also adding value to the on-boarding process of an organization.

WHAT ARE THE ROLES AND RESPONSIBILITIES OF AN ON-BOARDING PARTNER?

In addition to being a direct point of contact, an element of the on-boarding partner’s responsibility is to help establish a sense of belonging for the new employee. With an effective on-boarding partner, a new employee will quickly become a contributing member to his or her new department and team. To help accomplish this quick growth, the on-boarding partner’s responsibility is to:

- Act as an informational resource for the new employee on policies, procedures, work rules, norms, etc.
- Help socialize and involve the new employee in workplace activities
- Assist with instruction and training
- Act as an “office tour guide”
- Identify resources and explain important details about the workplace, corporate culture, and organization
- Introduce the new employee to other staff members

When acting as an on-boarding partner, it is important to remember that the individual is not the new employee’s manager or supervisor. As an on-boarding partner, the individual is also not responsible for the performance of a new employee. If questions arise regarding performance, or policy matters, the on-boarding partner should direct the new employee to their appropriate manager or supervisor.

HOW TO SELECT AN ON-BOARDING PARTNER

When selecting an on-boarding partner, he or she should:

- Have a personal presence that will impress and persuade the new employee that he or she is someone who can be trusted
- Be a superior performer in his or her own right
- Possess good communication and people skills
- Support and demonstrate commitment to the company's vision and values
- Be an effective source of advice and encouragement
- Have been employed more than one year (preferably)
- Be familiar with the new hire's role and responsibilities

WHAT A NEW EMPLOYEE EXPECTS FROM HIS OR HER ON-BOARDING PARTNER

- General advice
- Guidance
- Encouragement
- Positive attitude
- Confidentiality of shared information
- Honest feedback
- Clear information
- Help in understanding the culture of an organization and finding out how to get things done
- Assistance in building networks and insight into how to make them effective and productive
- Establishment of the best form of communication - email, telephone, in-person

ON-BOARDING PARTNER NOMINATION FORM / AGREEMENT

You have been nominated by your supervisor to act as an On-boarding Partner to assist with the orientation process of:

Name: _____

Job Title: _____

Start Date: _____

WHAT IS THE ON-BOARDING PARTNER PROGRAM?

The On-boarding Partner Program matches new employees with experienced staff members for their first 3 months of employment. This relationship is intended to:

- Provide the new employee with a point of contact for general inquiries regarding day-to-day issues—both formal and informal. *This includes information about policies, dress code, work rules, and other workplace issues in which the new employee experiences uncertainty.*
- Foster a comfortable relationship in which the new employee can access someone who is familiar with the corporate culture, norms, and expectations of the company.

WHAT IS AN ON-BOARDING PARTNER?

New employees often experience confusion and uncertainty as they strive to learn the “ins-and-outs” of a new workplace. An on-boarding partner is someone who offers advice and guidance throughout this introductory period and by doing so, helps the new employee integrate into the workplace with ease and confidence.

WHAT ARE THE ROLES AND RESPONSIBILITIES OF AN ON-BOARDING PARTNER?

In addition to being a direct point of contact, an element of the on-boarding partner’s responsibility is to help establish a sense of belonging for the new employee by:

- Acting as an informational resource for the new employee on policies, procedures, work rules, norms, etc.
- Helping socialize and involve the new employee in workplace activities
- Assisting with instructing and training
- Acting as an “office tour guide”
- Identifying resources and explaining important details about the organization
- Introducing the new employee to other staff members

When acting as an on-boarding partner, it is important to remember that you are not the new employee's manager or supervisor. As an on-boarding partner, you are not responsible for the new employee's performance. If questions arise regarding performance, disciplinary, or policy matters, you should direct the individual to their appropriate manager or supervisor.

WHAT DOES A NEW EMPLOYEE EXPECT FROM YOU?

- General advice
- Guidance
- Encouragement
- Positive attitude from the partner
- Shared information is kept confidential
- Honest feedback
- Clear information
- Help in understanding the culture of an organization and finding out how to get things done
- Assistance in building networks and insight into how to make them effective and productive
- Establishment of the best form of communication – e-mail, telephone, in-person

BENEFITS

- Give something back to your department.
- Share accumulated knowledge and experience.
- Gain a better understanding of yourself through helping others.
- Maintain or create a fresh perspective.

If you agree to participate as a partner in the “On-boarding Partner Program” please sign below. This signature confirms your commitment to the Program:

Printed Name	Date	Signature

PARTNER HANDOUT: GETTING STARTED

STEP 1: SET UP AN INTRODUCTORY MEETING

Your first meeting with the new employee should be introductory in nature and used to clarify your role as an On-boarding Partner and the purpose of the On-boarding Partner Program. You may also take this opportunity to show the new employee around the office, make introductions with co-workers, and ensure he or she has all the necessary equipment/materials to get started.

STEP 2: SET UP REGULAR MEETINGS

Following the initial meeting, ensure that you set up regular meetings with the new employee to provide them with a specific time slot to discuss any non-urgent questions and/or concerns. These meetings should occur every week and be long enough to provide you with an opportunity to follow-up on the progress of the employee (roughly 30 minutes).

STEP 3: PROVIDE ON-GOING SUPPORT

As the new employee begins to work independently, communicate your availability for extra help and questions. Mention that you are available for immediate issues, which prevent or affect work performance but that non-urgent questions and concerns should be left for weekly update meetings. As the new employee becomes more familiar with the workplace and his or her job tasks and responsibilities, you can expect to receive fewer inquiries. As part of your supporting role, be sure to inform and involve the new employee in any workplace/staff activities.

TIPS

- Do not worry about being perceived as the "expert." Your experience is important to the new employee.
- Be patient and positive. It takes time to develop a relationship. Do not try to cover everything right away. New employees need to allow enough time for growth.
- Do not try to force a relationship.
- Look for a preferred style of communication and/or cultural identification
- Do not try to turn the new employee into your clone. That person may have a different style from yours. Let the new employee develop.
- Listening may be more important than giving advice.
- Do not be judgmental.
- Do not lose heart because of a new employee's failures. You cannot always ensure success, but you can help that person to begin again more intelligently. You can help them see a failed experience as valuable by honestly identifying where it went wrong. On-boarding partners can often prevent failure from happening to a new employee a second time.
- Keep a good attitude and stay in a teaching spirit.

PARTNER HANDOUT: EVALUATION FORM

To ensure the ongoing development of our Orientation Program, we ask that you complete the following Evaluation in regards to your On-boarding Partner assignment and submit electronically to the manager of the department and Human Resources.

Please use the following rating scale:

- 1 - Strongly disagree
- 2 - Disagree
- 3 - Neither agree nor disagree
- 4 - Agree
- 5 - Strongly agree

Question	Rating
I was adequately briefed from my manager regarding my role and responsibilities as an On-boarding Partner	
The content of my discussions with the new employee were appropriate	
The frequency of my meetings with the new employee was adequate	
I feel this program has helped the new employee feel welcomed, valued and comfortable within the company	
I feel that we were able to meet the objectives of the On-boarding Partner Program i.e. covered everything necessary	
Overall, I feel this program is a valuable service to new employees	

1) The following are my suggestions for how the On-boarding Partner Program or new employee orientation in general could be **improved**.

2) The following are my comments on the **strengths** of the On-boarding Partner Program or new employee orientation in general.



90-DAY NEW EMPLOYEE SURVEY

Please take a few minutes to complete this survey about your first few months of employment. Please be constructive in your feedback, whether it is positive or negative. We strive to make continuous improvements to our orientation process and your information plays an important part in achieving this goal!

ORIENTATION

1) Prior to your first day of employment, did you receive all the information needed for a successful first day?

YES

NO

2) Please explain what was most helpful and if any information was missing.

3) Please indicate whether your supervisor or team leader met your expectations in the following areas:

	Exceeded Expectations	Satisfied Expectations	Did not meet expectations
Performing introductions to co-workers			
Providing valuable information regarding the workplace and company			
Discussing job responsibilities and tasks			
Answering questions and providing ongoing assistance			
Creating a comfortable and friendly work environment			
Facilitating workplace integration			

4) If applicable, please describe the ways in which your supervisor or team leader could have further assisted with the areas above:

5) Please indicate whether the following components of the orientation process met your expectations:

	Exceeded Expectations	Satisfied Expectations	Did not meet expectations
Orientation documents (New employee package)			
Communication of benefits and compensation			
Review of HR manual and policies			
Support from HR Manager and/or Department			
Support from supervisor or team leader			
On-boarding Partner Program (if applicable)			
Overall orientation process			

6) If applicable, please describe the ways in which the orientation process could be improved:

RESOURCES

7) After the orientation program, were the following set up within 5 working days?

Workstation	YES	NO
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Phone	YES	NO
Computer, ID, Passwords	YES	NO
Workstation Furniture	YES	NO

8) Please list any suggestions that you feel could enhance this process:

9) Did your new team members welcome you, and were they a good resource for obtaining additional information?

YES NO

Please explain.

JOB RESPONSIBILITIES

10) In your opinion, have you received adequate support and training to do your job effectively?

YES NO

11) Please explain what has been most useful and what further support is needed.

12) How would you compare the job described during the interview process to what you are actually doing?

13) How would you describe the pace of the work you are doing? Would you describe the amount of work as reasonable?

14) Now that you have been with the company for 90 days, how do you feel about your career decision? Please explain.

15) Please use this space to make any other comments or suggestions regarding your hiring process, new hire orientation, job specific training, and your overall company experience.

Thank you for your time and assistance with this survey. Your input is greatly appreciated and will help to continuously improve our employment and orientation process.

Please return your completed survey to _____ by _____

Manager's Onboarding Checklist: Before the Start Date	
	Assigned to:
Work Schedule and Job Duties	
<input type="checkbox"/> Call your new employee	
<input type="checkbox"/> Work Place Start Time: Click here to enter text.	
<input type="checkbox"/> First day contact person: Click here to enter text.	
<input type="checkbox"/> Provide Transportation and Parking information:	
<input type="checkbox"/> Review dress expectations and department cultures:	
Create action plan/task for the employee's first day	Assigned to: Click here to enter text.
Put together a welcome packet from the department and include:	
<input type="checkbox"/> Job description and Job Specs	
<input type="checkbox"/> Leave accrual and reporting guidelines, department procedures for requesting sick/vacation time	
<input type="checkbox"/> Department/unit organization chart	
<input type="checkbox"/> Contact information for co-workers in the department,	
<input type="checkbox"/> Mission/Vision and guiding polices for the District	
<input type="checkbox"/> Mission/Vision for the department/unit and how the employee's work supports the mission/vision	
<input type="checkbox"/> Contact information for co-workers in the department; map of district, map of the department with building(s) highlighted	
<input type="checkbox"/> Confidentiality Information	
<input type="checkbox"/> HIPPA and FERPA information (if appropriate) IT Acceptable Use Policy	
Making the Connections	
<input type="checkbox"/> Notify colleagues in your department of the new hire (include start date, what their job will be and employee bio)	
<input type="checkbox"/> Identify a coworker to be a resource for the new employee	
<input type="checkbox"/> Arrange a campus tour sometime in the first week or two	
<input type="checkbox"/> Set up meetings with critical people for the employee's first weeks	
Work Space	Assigned to:
<input type="checkbox"/> Order basic office furniture and supplies (desk, chair, bookshelf etc.)	
<input type="checkbox"/> Order computer if needed and have all relevant software installed	
<input type="checkbox"/> Order business cards, name tag, and name plate is prepared	
<input type="checkbox"/> Clean the work area	
<input type="checkbox"/> Schedule phone installation and assign a phone number	
<input type="checkbox"/> Verify that the employee's workspace is prepared	
Technology and Access	
<input type="checkbox"/> Computer	
<input type="checkbox"/> Consider software needs of the job such as: daily software needs, printer connections	
<input type="checkbox"/> Departmental portal and network access	

<input type="checkbox"/> Submit P-card requests (if necessary)	
Training /Development	Assigned to:
<input type="checkbox"/> Arrange pertinent trainings required for the job (examples include):	
Department Onboarding	Assigned to:
<input type="checkbox"/> Welcome them upon arrival – Understand that they may be nervous; try not to overwhelm them Show them to their workspace	
<input type="checkbox"/> Arrange to have lunch with the new employee on their first day Give them the department welcome packet	
<input type="checkbox"/> Review welcome packet and take time to discuss	
<input type="checkbox"/> Review work expectations, and process for reporting sick leave, sick child, and vacation time/requests	
<input type="checkbox"/> Review policies regarding breaks and meal periods	
<input type="checkbox"/> Provide overview of the schedule for the first day and work week Review Onboarding timeline (this document) with the employee Review Trial Service period (if applicable)	
<input type="checkbox"/> Introduce them to department and team members	
<input type="checkbox"/> Introduce them to a member of their department who can act as a resource	
<input type="checkbox"/> Show them where to find: restrooms, elevators, stairs, exits, kitchen area, lockers/closets, etc. Confirm that they receive building access cards/keys	
<input type="checkbox"/> Review FERPA and HIPPA guidelines (if applicable)	
<input type="checkbox"/> Show them where to find recycling and garbage bins	
Human Resources Onboarding	Assigned to:
<input type="checkbox"/> Take the new employee to HR to complete any outstanding new employee paperwork Assist the employee in signing up for these services:	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/> Have the employee sign the Position Description and Letter of Offer, if not done so already	
<input type="checkbox"/>	
Introduce them to work area	Assigned to:
<input type="checkbox"/> Overview of software and other technology, confirm they have set up email signature	
<input type="checkbox"/> Review Phone policy and long distance calls	
<input type="checkbox"/> Review the Computer Acceptable Use Policy	
<input type="checkbox"/> Introduce them to the office computer network (shared files and/ or drives)	
<input type="checkbox"/> Show them how to use the copier and other relevant office equipment	
<input type="checkbox"/> Assist the employee in accessing the appropriate systems:	
<input type="checkbox"/>	

First Week		
Check-in	Assigned to:	
<input type="checkbox"/> Inquire how first week went and make time to listen to any questions		
<input type="checkbox"/> Review training schedule		
<input type="checkbox"/> Verify that computer, network systems, printer, email, telephone, voicemail. etc. are working and ensure that duplex printing is set as default		
<input type="checkbox"/> Explain your work style and discuss how it will fit with the style of the new employee		
<input type="checkbox"/> Provide list of current department projects and cyclical programs		
<input type="checkbox"/> Discuss District and Department/Unit's Mission, Vision and Values		
<input type="checkbox"/> Review key PSS policies: <ul style="list-style-type: none"> • Affirmative Action Policy • Anti-Harassment – 4.30.061-AD • Racial Educational Equity Policy 2.10.010-P • Auto Mileage Allowance for Employees – 5.50.072-P • Child Abuse Reporting – 4.50.050-AD • Child Abuse Reporting Procedures and School Plan • Confidentiality Agreement & Acknowledgement • Complaint Policy 4.50.030-P • Drug Free Workplace Act • Student and Staff Acceptable Use of District Technology Policy (AUP) – 8.60.041-AD • Nondiscrimination Policy – 1.80.020-P • Personnel Records – Procedures for Use – 5.20.111-AD • Prohibition Against Employee Child Abuse and Sexual Conduct with Students - 5.10.063-AD • Sexual Harassment - Staff to Student – Policy – 5.10.062-P • Sexual Harassment Policy and Complaint Procedure – 5.10.060-P / 5.10.061-AD • Tobacco Possession and Use Policy – 3.30.021-P 		
First Month		
Check-in		Assigned to:
<input type="checkbox"/> Establish weekly or bi-weekly meetings with new employee		
<input type="checkbox"/> Answer their questions and help foster engagement with organization		
<input type="checkbox"/> Check in about benefits and pay statement to see if they have any questions		
<input type="checkbox"/> Review job description and see if there are any questions		
<input type="checkbox"/> Discuss process for performance reviews; set short-term and long-term goals		
<input type="checkbox"/> Review performance standards		
<input type="checkbox"/> Check in with onboarding partner for their perspective		