



NEW EMPLOYEE ORIENTATION

University of Minnesota

Driven to Discover™

New Employee Orientation at the University of Minnesota has changed. No longer is the central OHR orientation (NEO) session a single shot of benefits and retirement information that employees attend once and then forget about for the rest of their time at the U. Central OHR has created a year-long NEO that helps get employees engaged with the University right from the start. It is intended to help you retain your employees, get them up to speed as quickly as possible, and provide them a sense of community with the larger organization. This sort of orientation is something beyond the traditional — it's onboarding.

Onboarding is a business term used to describe the process of orienting, socializing, training, and retaining an employee during his or her first year of employment. Comprehensive onboarding programs have been shown to have dramatic and lasting positive effects on retention and engagement rates of new employees. The University of Minnesota's NEO is on the leading edge of comprehensive onboarding. And the NEO team is here to provide you with any support you need to align and grow your unit- or department-level onboarding to make it as efficient and effective as possible.

To that end we created this toolkit to help you begin, enhance, or expand an onboarding program for your unit or department. The toolkit is intended to give you all you need to start a comprehensive onboarding program from scratch, but if you already have a great thing going — you can use the toolkit to find new ideas, best practices, or additional resources that may make your great thing even better.

Inside you will find:

- A table of contents that will let you find what you need quickly
- Information on onboarding and how it provides a high return on investment
- Detailed information on the central OHR's onboarding program so you can align your program to avoid duplication
- Best practices and ideas for building and enhancing your unit- or department-level onboarding
- An appendix that includes
 - Visuals of central OHR's onboarding program for your use or to help explain things to others
 - A best practice New Employee Checklist for you to adapt and use with your new employees
 - A best practice template agenda for you to adapt and use when planning unit or departmental meetings for a group of new employees
 - A Supervisors' Toolkit for you to go over with the supervisors in your unit or department to explain their critical part in the onboarding process and give them tools they need to do that job well

And you can always contact me. I would be happy to help you work on building or enhancing your onboarding process in whatever way I can. You can contact me at 612-624-5866 or via email at doepn002@umn.edu. These documents are all available on the OHR Manager's Toolkit as well. They can be downloaded and adapted for your particular needs. As you go through these things, let me know if you have ideas for changes. The process of building a great onboarding program is ever changing and the NEO team would welcome your suggestions.

We hope you find this toolkit useful and look forward to helping you welcome our newest colleagues to this great institution.

Stacy Doepner-Hove Onboarding Program Director University of Minnesota Office of Human Resources

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The University of Minnesota aims to provide both a supportive and welcoming environment to its new staff and faculty. As an employer, the University of Minnesota takes pride in its employees, seeking to recruit and retain top-notch people from around the world.

The Onboarding Program at the University of Minnesota Twin Cities campus is designed to bring the University's newest employees up to speed, while actively involving them and engaging them with campus culture.

"I appreciate the program and commitment to making employees feel like they belong."

– U of M Employee

This program will help ensure that those who are "New to the U" feel as much a part of the University culture as those who have been employed here for years.

What Is Onboarding?

Onboarding at the University of Minnesota is an initiative targeting new employees, which seeks to help them perform better in their jobs sooner, with a closer connection to the University of Minnesota's own unique culture and way of doing things.

Extending beyond the new employee orientation which continues to be housed at the departmental level, the onboarding program is run by the central Office of Human Resources and will work to develop those new employees on a more macro-level.

"I really appreciated the whole series; thanks for your hard work in development and implementation."

- U of M Employee

The onboarding program will encompass a full series of trainings and seminars over an employee's first year, aiming to bring your newest employees up to speed efficiently at the University of Minnesota.

Connection Between Onboarding and Employee Engagement

Are employees who participate in an onboarding program more engaged with their employer? Most definitely! Research shows that employees make the critical decision to stay or leave within the first six months and that having the newest talent participate in an onboarding program can "maximize retention, engagement, and productivity" (HCI White Paper, 2008).

Since the University works very hard to recruit a top-notch workforce to help achieve its overall mission, it is in the best interest of all University managers to do their best to retain their talented workforce and keep those workers engaged with the University's mission.

How You and Your Department Will Benefit

Onboarding is designed for the whole employee, keeping them connected to the organization, and maintaining awareness of their needs in context of their new work environment. It has a focus of retention, but also development. The University's onboarding program will set the foundation for a well-engaged employee, who is a champion of the University's mission, goals, and initiatives.

The University's onboarding program aims to:

- Increase new employee productivity, by training them about the University's culture and how to navigate the University system.
- Improve retention rates of new employees within all employee groups. By providing the wide array of information that employees need in order to feel engaged, successful, and connected to the University community, this program will reduce your time spent rehiring and retraining, leading to a reduction in your downtime costs and an increase in your overall productivity.
- Provide audience-specific, in-depth, timely information over an extended period of time, so that the information is useful and memorable for the new employee.
- Reduce redundant programs within colleges and OHR, thereby saving costs while guaranteeing the delivery of high-quality, consistent, and accurate information systematically to all University employees.

"It all helped me feel a part of the bigger U environment and got me out and around campus."

- U of M Employee

"Thank you for hosting these sessions – they've been very interesting and fun – nice way to learn about the U and meet people from different departments."

- U of M Employee

Your Professional Needs	What the Onboarding Program Provides
Increase new employee productivity	Trains new employees about the University's culture and system, allowing them to navigate the University faster and more efficiently.
Increase retention of new employees	By providing the wide array of information that employees need in order to feel engaged, successful, and connected to the University community, this program will reduce your time spent rehiring and retraining, leading to a reduction in your downtime costs and an increase in your overall productivity.
Assistance with specialized, job-specific training	Provides large group structured trainings which are job specific, leading to a reduction in training costs, increase in productivity, and opportunity for the new employees to meet others in their job category to help in building their network and ultimately, engagement.
Help with training on centralized knowledge, critical to the U's culture	Provides audience-specific, in-depth, up-to-date and timely information over an extended period of time, so that the information is useful and memorable for the new employee.
Help with engaging your new employees into the U's culture	Offers opportunities for new employees to meet other new employees at a variety of venues and times, thereby involving new employees in the culture of the University from an early date. This fosters early engagement and will reduce the chance of attrition and early turnover.
Engage your new employees with different departments throughout the University	Offers an approved and systematic method for introducing your new employees to different departments throughout the University, so you can focus on more job-specific tasks and training needs. Provides a contextual structure for your newest staff members, allowing them to get up to speed more quickly about the University's business processes and organizational infrastructure.

University of Minnesota – Twin Cities Onboarding: Why Participate Research

The Importance of Onboarding

Much research supports the concept of onboarding, which is well beyond the "traditional orientation". As confirmed by the Human Capital Institute (2008) that, "Best-in-class onboarding programs go beyond orientation, and include, for example, socialization into the company culture to assure new hires that they have made the right decision" (p. 2).

Research shows that retention is a major theme to any onboarding program. By retaining the great employees an organization has worked so hard to recruit and hire, an organization can reduce their overall costs and work on developing those new employees further:

"Three significant talent management challenges companies face in today's economy are engaging and retaining new hires beyond the orientation phase of employment, maximizing their productivity as quickly as possible, and maximizing the return on investment in the hiring process. Many companies find comprehensive onboarding programs to be a key component in successfully meeting these challenges... Onboarding can make a considerable difference in a company's brand, its ability to attract and retain new employees, and decrease the cost of recruitment." (HCI White Paper, 2008, p. 2)

According to the Society of Human Resource Management, "The difference between employee orientation and onboarding is the amount of time spent connecting the new employee to the job, to the team and to the company's values. The payoff is better retention and a more fully engaged employee" (Overman, 2005, p. 1).

Additional research supports onboarding, in many different organizational frameworks and types.

Background Research Supporting Employee Engagement at the U

In 2006-2007, the University of Minnesota's Presidential Emerging Leaders program focused on employee engagement of the University of Minnesota employees. In their findings, they cite the importance of having employees who are engaged with their organization and committed to its mission:

Research has established a strong connection between staff engagement and the productivity and sense of community found in an organization or business, thus leading to an improved and more effective organization. Engaged staff members are willing to take extra initiative and put extra effort into work roles, and have the perception that their work matters to the success of the enterprise's mission. Engaged staff will be an integral component as the University moves forward in realizing its goal of becoming one of the top three research universities in the world. (PEL program, 2006, p. 1-2)

The 2006-2007 PEL program report goes on to cite that an engaged employee:

- "uses discretionary effort,
- is motivated to do his or her best work,
- is connected to the University's community,
- contributes to the overall success of the University's mission, and
- functions as an engaged ambassador on behalf of the University to coworkers, students, potential employees, and the citizens of Minnesota" (p. 1).

Best Practices

The Human Capital Institute (2008), a membership organization designed for professionals in management, HR/OD, and recruiting, summarized research by the Aberdeen Group on the topic of onboarding, ranked organizations as "best-in-class" for their orientation and onboarding programs. They found that:

- "Best-in-class companies also demonstrated increased organizational awareness of the benefits of onboarding"
- "Ninety-four percent of the best-in-class companies provided new hires with socialization into the company culture"
- "Best-in-class companies...have learned to begin onboarding in the last stages of recruiting"
- "Best-in-class companies have proven the importance of assessing onboarding performance and employee attitude at three, six, and nine months"

Return on Investment

Recruiting and training new employees can be costly, but the cost of replacing them is even higher. Determine your attrition costs for replacing an employee by using the following tool:

To determine the separation, vacancy, replacement, and training costs of an employee, use the following percentages to calculate the costs:

Non-exempt employee: 25-30% of salary

Exempt employee: 100-150% of salary

Executive employee: 3-5 times salary and benefits

Regardless of the employee level, replacement costs are high. Enroll your new employees and align your orientation efforts with the central onboarding program, so that they:

- Feel more engaged and like a vital member of the University community,
- Are more productive earlier in their position,
- Can increase their chance to succeed while reducing their level of frustration often experienced in starting a new position, and
- Can improve their productivity, engagement, morale, and overall success.

"Investing in the success of our employees is key to achieving the institution's long-term objectives."

– Transforming the U for the 21st Century, Strategic Positioning Report to the Board of Regents from President Robert H. Bruininks, September 2007

University of Minnesota – Twin Cities Onboarding Program Description and Overview

Program Description and Overview

The University of Minnesota aims to provide both a supportive and welcoming environment to its new staff and faculty, with the goal of gradually bringing them into the unique culture of the University.

The new Onboarding Program at the University of Minnesota Twin Cities campus is designed to bring the University's newest employees up to speed, while actively involving and engaging them with campus culture. As an employer, the University of Minnesota takes pride in its employees, seeking to recruit and retain top-notch faculty and staff. The on-boarding program will help ensure that those who are "New to the U" feel as much a part of the University culture as those who have been employed here for years.

Designed for the employee who is unfamiliar with the culture of the University, this program consists of a series of courses which will provide different facets to an employee's understanding of the University, how we do business here, our policies and procedures, but also those fun and exciting elements which make this place home to so many students, staff, and faculty.

The training sessions and modules are held throughout an employee's first year on the job and are designed with the employee's overall development and engagement in mind.

Each training activity covers a new topic, opening up a new opportunity for learning for the employee. Different components of the year-long program include: a focus and history on the University, diversity training, professional and personal development opportunities, job-specific trainings, and communications trainings.

"I appreciate the opportunity to meet and get involved with other individuals. This may not happen if we don't reach outside our own units."

 $-\ Uof M\ Employee$

Who is involved?

The University's onboarding program is set up and conducted by the Office of Human Resources (OHR). However, numerous professionals from throughout the University are featured throughout the different areas in onboarding program, giving your newest employees an opportunity to learn from different subject matter experts from various departments around the University.

Departments used throughout the full, year-long onboarding program include:

- Office of Human Resources and New Employee Orientation Staff (OHR)
- Council of Academic Professionals and Administrators (CAPA)
- Civil Service Committee (CSC)
- Office of Equity and Diversity
- Wellness Collaborative
- Organizational Effectiveness (OE) from Office of Human Resources (OHR)
- Office for Public Engagement
- Office of Information Technology (OIT)
- Center for Teaching and Learning (CTL)
- University Relations (UR)
- Union group representatives (AFSCME)
- University of Minnesota Libraries

"I really appreciated the blend between resources for work and life outside of work in each presentation."

- U of M Employee

University of Minnesota – Twin Cities Onboarding Program Timeline and Details

Schedule and Timeline

Working in tandem with the unit-level traditional new employee orientation, the central onboarding program is comprised of sessions, job trainings, and social modules. The full timing of the program is an employee's first year in their new position, starting with the first program occurring in their first month of employment.

See Appendix A for a generic, full timeline on the central onboarding program, based on a new employee start date.

Central OHR Onboarding Sessions

The main sessions are designed to give the employees baseline knowledge to help them in functioning in their jobs. Starting at the first few months of employment and continuing throughout the first year, these formalized training programs offer a wealth of knowledge and exposure to critical elements of the University as an employer.

• Discover the U: Who We Are, Where We're Going

Takes place within the first three (3) months of employment start date. The focus of this session provides a quick introduction to the University, giving an overview of the mission and strategic vision of the University as a whole, as well as providing a warm-up to the culture found here and equipping new employees with basic University knowledge, which is not typically learned on the job or at the departmental level.

• Discover Community: Building our Diverse Community

Takes place after six (6) months of employment at the University. The focus of this session is on diversity, equality in the workplace, access to everyone, and inclusiveness. Conducted primarily by the Office of Equity & Diversity, this session discusses the University's position on diversity, beliefs on diversity, and provides resources available to employees.

• Discover You: Personal and Professional Development Opportunities

This is the final session in the series of three (3) sessions, conducted at the end of the first year an employee has been with the University. With a reception style and flair, this final session focuses on the employee's professional and personal development, as well as provides recognition for the employees who have completed the full training series during their first year of employment at the University. Topics covered in this session include professional development, technology, public engagement, and wellness.

Job Trainings

Job trainings are generalized sessions which offer your newest employees an opportunity for a greater understanding about their job, resources available to them, and communication within a higher educational setting. There are three kinds of job trainings, detailed below.

New employees are encouraged to participate in all three:

• Job-Specific Trainings

Job trainings vary by an employee's position and are typically held throughout the year, depending on the overall need. Content for selected trainings is developed and delivered by the specific department, with marketing assistance from central human resources. Employees sign up for the module which is most relevant to their job category/classification.

Examples of these are human resources, communications, research, teaching, and information technology. Other sessions are conducted either by central HR staff or appointed subject matter experts, on behalf of central HR.

The Libraries and U

This module – open to all interested employees, not just new employees – is to provide a working knowledge of the University's extensive library system, including its resources and search engines, such that the employees gain an understanding of what is at their disposal in terms of resources for their job positions (if required) or their own edification.

Communicating at the U (New!)

This is a new, three-part series, which focus on communication at the University, including the hidden dynamics between communications of different levels of employees. The three parts include topics such as communication differences, communicating with stakeholders, and general communication at the University.

Social Modules

As many people know, the University can be an exciting place to work, boasting an atmosphere of arts, culture, sports, and education. The onboarding program's social modules aim to engage the newest working members of the University community by encouraging this aspect of the University culture.

Brown Bag Fun Lunches

Held on a monthly basis and over the lunch hour, these sessions aim to give the employee a structured opportunity to socialize with others outside of their department. Each lunch time has a different focus, often with a lecture followed by a relevant tour to a yet-to-be explored area of the University.

Culture Crawls

Held monthly during the school year, these sessions highlight the University's cultural side, by focusing on the University's arts, theater, and more. Employees can bring guests to these events, as the timing varies depending on the venue.

• Gopher Go

No Big Ten school is complete without athletics! The Gopher Go session allows the newest employees discounted rates to see sporting events and hear from different people affiliated with the University's athletic teams. The timing for this session varies by event and availability.

"This was the most helpful diversity presentation I've ever attended."

- U of M Employee

"The first main session was very helpful to see the larger views of the University system."

- U of M Employee

"Culture crawls are great – repeat them often so I can attend the ones that were full or when I had conflicts."

- U of M Employee

Enrollment Process

Enrolling your new employees in the central onboarding program is automatic, once they have signed up for "New Employee Orientation" at this page:

http://www1.umn.edu/ohr/newemployee/index.html

They will need their X.500 and their password to log in at this site. Please make sure that your employees have this information readily available.

Once they have signed up for their first session, invitations to subsequent sessions will be automatically sent by the Office of Human Resources. Their job-specific trainings will be arranged accordingly, as will their initial introduction to their union representatives, if applicable.

The only accommodations for the onboarding program you will need to make is to allow your employee the time to attend the events, encouraging them to do so.

Role of Office of Human Resources (OHR)

The Office of Human Resources will set up all of the sessions and modules. Once your employees have signed up for their first New Employee Orientation, their names and contact information will be collected and follow-up with be made directly with them via email from OHR. Invitations to participate in subsequent sessions will be sent out based on the month when the employee attended the first NEO session.

Please encourage your employees to attend the sessions and modules, allowing them the time from their jobs to do so. Employees who are discouraged to attend may start to disengage from the University and their department. Additionally, the content missed in the training sessions and modules will need to be picked up from other means 'on the job', often on an as-needed basis.

University of Minnesota – Twin Cities **Support and Collaboration**Enhancing Your Unit Level Orientation

The Office of Human Resources is working in collaboration with you to create a successful environment for your employees. By working together, your newest employees will benefit not only from the programming offered at the central level, but from the expertise at your unit level.

This section outlines support provided to you as a professional, which you can use to enhance your own unit level orientations.

Enhancing Your Unit Level Orientations

As you already know, orientation at the unit level is critical to employee success. It is a detailed process with many facets, with each step and element as crucial as the next.

Even if you have a successful new employee unit-level orientation program, you may find that the enclosed templates and checklists will enhance your efforts for even greater success. Content included in these documents comprise the industry's "best practices," but were put together specifically for the University of Minnesota and your convenience from the Office of Human Resources (and are included in this packet as appendices):

- New Employee Checklist:
 Use this for your initial, 1:1 meeting with your new employee(s)
- Unit Level Group Meeting Agenda:
 Group meeting agenda and discussion topics to orient the employee

These checklists are not meant as a substitute for the central onboarding program. They are designed to help you streamline your business process and workflow, within your department. These are enclosed in this packet, but are also available online, at the Manager's Toolkit on the OHR Web site.

If you have any questions, please contact Stacy Doepner-Hove (doepn002@umn.edu).

Additional Support

Additional support is always available to you and your supervisory/managerial staff. Following are resources you can take advantage of at any time, at no cost to your unit:

New Employee Orientation Web Site
 Detailed information on the New Employee Orientation http://www1.umn.edu/ohr/newemployee/index.html

• Training: Keys to Supervision

Attend "Keys to Supervision" training, even if you are not a supervisor or manager, so that you have an understanding of what messages are given to them. Encourage your supervisors attend this training as well.

This interactive session teaches about fostering a positive climate for new hires and highlights the best practices for bringing them on-board successfully. Training schedule for "Keys to Supervision" is found here: http://www1.umn.edu/ohr/supervisors/keys/index.html

Circulate the "Onboarding Toolkit for Managers", which will educate managers/supervisors on what they need to do with their newest employees (enclosed as an appendix).

Consultation

Need a consultation about onboarding or want to develop of unit-level new employee orientation?

Stacy Doepner-Hove
Onboarding Program Director
Office of Human Resources – Communication
doepn002@umn.edu
612-624-5866

University of Minnesota – Twin Cities Questions and Resources For Additional Information

Questions?

New Employee Orientation:

Phone (General) 612-626-3490

E-mail <u>newemployee@umn.edu</u>

NEO Ning Networking Site http://newumnemployee.ning.com

Office of Human Resources (Communication):

Stacy Doepner-Hove
Onboarding Program Director
Office of Human Resources, Communication
doepn002@umn.edu
612-624-5866

Website Resources

New Employee Orientation New Employee Orientation Ning Site Supervisory Development http://www1.umn.edu/ohr/newemployee/index.html http://newumnemployee.ning.com

http://www1.umn.edu/ohr/supervisors/index.html

- Keys to Supervision Training
- Core Supervisory Skills Training

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Thank you to the workgroup

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For Further Reading

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Transformational Leadership Project, New Employee Orientation Redesign, University of Minnesota

University of Minnesota – Twin Cities Appendix Templates, Timelines and Checklists

To be enclosed as appendices or put within the pages of this document:

Appendix: Onboarding Program

- Timeline for the onboarding program
- Pie chart

Appendix: Unit Level Orientation

- New Employee Checklist
- Unit Level Group Meeting Agenda
- Onboarding Toolkit for Managers
 - Appendix: Manager's Checklist



Onboarding Toolkit for HR Professionals - Appendix





NEW EMPLOYEE ORIENTATION

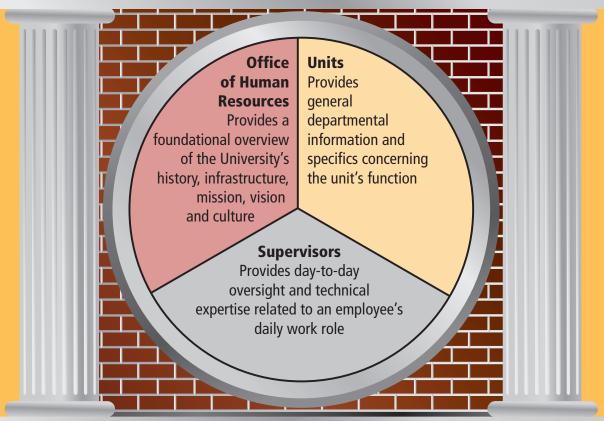
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Driven to Discover

MISSION:

EXTRORDINARY EDUCATION
BREAKTHROUGH RESEARCH
DYNAMIC PUBLIC ENGAGEMENT

NEW EMPLOYEE ORIENTATION



EXCEPTIONAL FACULTY AND STAFF: RECRUIT, MENTOR, REWARD, AND RETAIN WORLD-CLASS FACULTY AND STAFF WHO ARE INNOVATIVE, ENERGETIC, AND DEDICATED TO THE HIGHEST STANDARDS OF EXCELLENCE.

University of Minnesota

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New Employee Orientation at a Glance

Month by Month Timeline, Based on New Employee Start Date

	Ι											
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Individual Orientation	(Unit L	evel)										
First day orientation at the unit and department level												
Weekly meetings for new employee with supervisor												
Unit level orientation for a group of new employees												
Check in with new employee from unit-level HR												
Mid-year review for new employee by supervisor												
Central OHR On-Boarding Sessions	(Centra	al OHR)										
Discover the U: Who We Are, Where We're Going												
Discover Community: Building Our Diverse Community												
Discover You: Personal & Professional Development Opportunities												
Job Trainings	(Centra	al OHR)										
Job-Specific: offered periodically throughout the year												
The Libraries and U												
Communicating at the U: offered twice beginning November 2009												
Online trainings offered on: benefits, retirement, parking and transportation, phones/e-mail/Web/etc.												
Social Modules	(Centra	al OHR)										
Brown Bag Fun Lunches												
Culture Crawls												
Gopher Go												

New Employee Checklist

Employee Name:	Employee I.D. Number:			
Room Number:	Position Title:			
Phone Number:	Department:			
E-mail Address:	Supervisor:			
Human Resources:	Payroll			
 □ AFSCME □ Building Hours □ Campus Layout and Maps □ Civil Service □ Customer Service Standards and Philosophy □ Department Purpose, Program, Mission □ Employee Handbooks/Contracts (Refer to University Web Sites) □ Employee Recognition Programs □ Faculty □ Navigation of University and Dept. Web Site □ Org Chart □ Office of Student Affairs, People and Location □ P & A □ Parking and Transportation □ Policies and Procedures □ Position description and expectations □ Student Development Outcomes □ Teamster □ Tour of people, places, and services 	 □ Absences □ Employee Benefits □ Holidays □ Payday Calendar and Direct Deposit Option □ Sick child or other emergency □ University Overtime and Comp Time Policies □ University Probation Period □ Vacation and Sick Leave □ When and whom to call Personal □ Address, Telephone, Name Changes □ Employee Assistance Program 			
	 □ Online Directory - One stop for changes and/or privacy settings □ Order Business Cards □ School Closings □ Security Protocols □ U Employee Wellness Program 			
 □ U-Card □ University Academic Calendar/Holidays □ University New Employee Orientation Session - Date: 	Training and Development ☐ Customer Service Training ☐ Performance/Attendance Reviews ☐ Probationary/Tenure Period Explained			
Administration	☐ Regent's Scholarship			
 □ Calendar – UMCal, Meeting Maker, etc. □ Direct Deposit □ E-mail □ Emergency Contact Information □ I-9 □ Office Communications □ W-4 	☐ Training Opportunities, Job Specific			

New Employee Checklist (Page 2)

Supervisor	
☐ Access to Department Computer Network	Employee Name:
 □ Access to University Computer Systems □ Breaks and Break Areas □ Department Portal Site (if Applicable) 	Employee Signature:
☐ Dress Codes	Supervisor:
 □ Emergency Procedure Manual □ Equipment and Supplies Location, Usage, & Codes □ Introduction to Co-workers 	Human Resources:
☐ Location of University/Department Handbooks	Work Setting
 □ Office Hours, Work & Meeting Schedules □ Office Space and Keys □ Performance Development & External Activities Request □ Purchasing Card (if applicable) □ Schedule Meetings with Other Staff (if applicable) □ Title, Job Description & Reporting Lines Other	 □ Assignment of Mentor or Buddy □ Building Layout, Restrooms, Lockers, Vending Machines, Equipment Areas, Supply Areas, Break Areas □ Campus Maps, Restaurants, Recreation Facilities, Banks, Post Offices, ATM Machines □ Data Privacy and HIPAA Online Training Information and Schedule □ Department Policy on Celebrations □ Department Traditions and recognition
	E (B
	_ Ergonomics Worksite Consultation
	D Dansand Dhana Calla and Dhana Dallar
	☐ Supply Ordering Policies
	University Vehicle and Travel Policy



Template Agenda for Unit Level New Employee Orientation

Networking

- Food
- Depending on the time of day and the length of the program, provide a snack and beverages or a small meal.
- Nametags
- Tables
 - Try to have tables where new employees can sit around in groups. Classrooms don't provide much chance for the new employees to talk with each other, which should be a main goal of this large session.
- Ice-breakers (5-10 min)
 - At least one game or activity to help people feel comfortable with each other and in their surroundings.
 - It also can help to have table tents on the tables you will have the new employees sit around with suggested discussion topics so they can talk with each other about the topics as they are waiting for things to start.

Welcome

- Dean or member of Executive Committee (10-15 min)
 - Important to have a key unit individual to show the importance we place on welcoming our new employees and helping them to adapt to their new positions.
- University of Minnesota Overview, Mission, Vision (5 min)
 - Should just be a quick overview to lead into the unit overview because new employees learned about the entire University at length in their initial new employee orientation.
- Unit Overview, Mission, Vision, Culture (10-15 min)
 - Define and explain the mission and vision of your specific unit and how your group of employees lives up to those duties and aspirations.
 - Explain to the employees our commitment to excellence, teamwork, diversity, personal responsibility, etc.

School/Unit History

- School/Unit (10 min)
 - Incorporate fun facts, school accomplishments, important events, special buildings, notable transformations, etc.
- Deans/Leaders and their accomplishments (5 min)
 - Describe a few key deans or important figures that made positive changes in your unit
- Notable Alumni (5 min) (if applicable)
- Current Statistics and Rankings (5 min) (if applicable)

Template Agenda for Unit Level New Employee Orientation

Unit Strategic Plan (15-20 min)

- Overview
 - Where are you as a unit and where do you want to be in 3, 5, 10 years? How can your employees get involved in the follow through of this plan?
- Unit strategies
- Department strategies
- How strategies in both are supported
 - Who plays what role? Where can employees go for advice or assistance to carry our their strategic duties

Organization Structure

- Overview of department and programs (5-10 min)
- Overview of what services each department offers (5-10 min)
- Current research (5-10 min)
 - What current research is being done to improve your unit or the services your unit provides?
- Information on Department Heads or Directors (3 min)
 - Dean/VP
 - Associate/Assistant Deans or Directors
 - Department Chairs and Area Managers
 - Give handout of photo directory with short bios so new employees have something to take away and refer to again when they have questions or provide this online
- Panel of recent hires to discuss why it's great to work here and what they wish they would have known (15-25 min)
 - Q & A
 - Are people formal or informal
 - Where are a few good places to eat lunch
 - Who should I go to with questions
- Tour of the facilities
 - This may be difficult if the unit is spread across many buildings, perhaps a virtual tour with pictures of the buildings and a vocal tour guide

Human Resources

- Employee Handbook (5 min)
 - Code of Conduct
 - Sexual Harassment
 - Drug-Free Workplace
 - Vacation Policies for each employee group
 - Briefly reiterate your department's policies on these topics. Employees were introduced to the University's policies on these topics at their initial orientation. Offer handouts if necessary.
- Performance Reviews (3 min)
 - How often are reviews given, what is the criteria used, how are the results scored and used after that

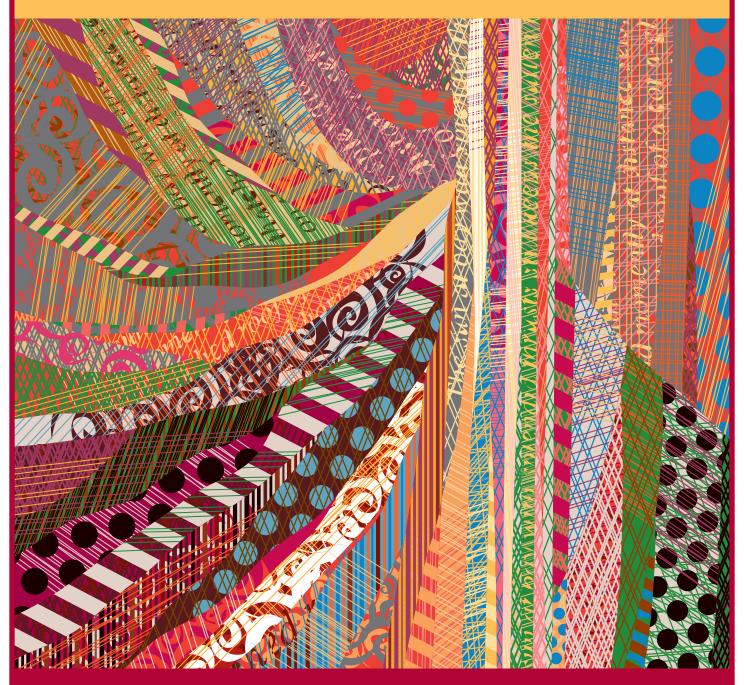
Template Agenda for Unit Level New Employee Orientation

- Recruiting Policies (3 min)
 - Do you welcome employee referrals? How often do new employees enter this unit and it what positions?
- Professional Development (5 min)
 - Establish career goals with your new employees and the paths they can take to reach those goals. How will you help them? Where can they go for guidance?
- Employee Assistance (3 min)
 - Who should employees contact when professional or personal issues and conflicts arise?
- Employee Resources (3 min)
 - Give contact information for all of the resources employees have access to because they are a party of your unit.
- Workplace Safety (5 min)
 - Specific instructions on what to do and where to go in the event of an emergency, also what they can do to stay safe during everyday working situations
- Diversity Training (3 min)
 - Go over the importance of diversity in our University and your department's views
- Conflict Management Training (3 min)
 - Where should employees go if they have a problem? What are normal situations that arise in your unit and how should employees solve them?
- Leadership Training (2-3 min)

Training

- Continued Education/Regents Scholarship (5 min)
 - Explain how the scholarship provides eligible employees tuition dollars for University of Minnesota credit-bearing courses. Explain policies, restrictions, and how to begin the process. Also, give details on how more education and higher degrees will help your new employees advance their careers in your unit.
- Unit specific trainings (5 min)
 - There are many unit-specific trainings listed on unit websites that are, many times, free for employees to take. Give the employees a list of trainings that your unit offers and contact information to get started.
 - Discuss your unit's professional development policy and how new employees can take advantage of getting more training for their position
- Other available training and workshop opportunities (5 min)
 - New Employee Orientation
 - Year-long program that consists of many different trainings
 - Professional Development
 - There are MANY general trainings that are open to University employees in several units throughout the University







NEW EMPLOYEE ORIENTATION

University of Minnesota

Driven to Discover™

Overview of Contents

Description of Onboarding

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- Connection Between Onboarding and Employee Engagement
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- Description and Overview
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- Role of Office of Human Resources (OHR)
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- Support Provided to You
- Questions?
- Web Site Resources

References and Resources

- References Cited
- For Further Reading

Appendix: Manager's Checklist

The University of Minnesota aims to provide both a supportive and welcoming environment to its new staff and faculty. As an employer, the University of Minnesota takes pride in its employees, seeking to recruit and retain top-notch people from around the world.

The Onboarding Program at the University of Minnesota Twin Cities campus is designed to bring the University's newest employees up to speed, while actively involving them and engaging them with campus culture.

This program will help ensure that those who are "New to the U" feel as much a part of the University culture as those who have been employed here for years.

"I appreciate the program and commitment to making employees feel like they belong."

- U of M Employee

"Investing in the success of our employees is key to achieving the institution's long-term objectives."

– Transforming the U for the 21st Century, Strategic Positioning Report to the Board of Regents from President Robert H. Bruininks, September 2007

What Is Onboarding?

Onboarding at the University of Minnesota is a new initiative targeting new employees, which seeks to help them perform better in their jobs sooner, with a closer connection to the University of Minnesota's own unique culture and way of doing things.

Extending beyond the new employee orientation which continues to be housed at the departmental level, the onboarding program is run by the central Office of Human Resources and will work to develop those new employees on a more macro-level.

The onboarding program will encompass a full series of trainings and seminars over an employee's first year, aiming to bring your newest employees up to speed efficiently at the University of Minnesota.

"It all helped me feel a part of the bigger U environment and got me out and around campus."

- U of M Employee

The Connection Between Onboarding and Employee Engagement

Are employees who participate in an onboarding program more engaged with their employer? Most definitely!

Since the University works very hard to recruit a topnotch workforce to help achieve its overall mission, it is in the best interest of all University managers to do their best to retain their talented workforce and keep those workers engaged with the University's mission.

How You and Your Department Will Benefit

The onboarding program has a focus of retention and employee development.

It is designed for the whole employee, keeping them connected to the organization, and maintaining awareness of their needs in context of their new work environment. The University's onboarding program will set the foundation for a well-engaged employee, who is a champion of the University's mission, goals, and initiatives.

The University's onboarding program aims to:

- **Increase new employee productivity**, by training them about the University's culture and how to navigate the University system.
- **Improve retention rates** of new employees within all employee groups. By providing the wide array of information that employees need in order to feel engaged, successful, and connected to the University community, this program will reduce your time spent rehiring and retraining, leading to a reduction in your downtime costs and an increase in your overall productivity.
- **Provide audience-specific, in-depth, timely information** over an extended period of time, so that the information is useful and memorable for the new employee.
- **Reduce redundant programs** within colleges and OHR, thereby saving costs while guaranteeing the delivery of high-quality, consistent, and accurate information systematically to all University employees.

"Thank you for hosting these sessions – they've been very interesting and fun – nice way to learn about the U and meet people from different departments."

- U of M Employee

"I really appreciated the whole series; thanks for your hard work in development and implementation."

- U of M Employee

Your Professional Needs	What the Onboarding Program Provides
Increase new employee productivity	Trains new employees about the University's culture and system, allowing them to navigate the University faster and more efficiently.
Increase retention of new employees	By providing the wide array of information that employees need in order to feel engaged, successful, and connected to the University community, this program will reduce your time spent rehiring and retraining, leading to a reduction in your downtime costs and an increase in your overall productivity.
Assistance with specialized, job-specific training	Provides large group structured trainings which are job specific, leading to a reduction in training costs, increase in productivity, and opportunity for the new employees to meet others in their job category to help in building their network and ultimately, engagement.
Help with training on centralized knowledge, critical to the U's culture	Provides audience-specific, in-depth, up-to-date and timely information over an extended period of time, so that the information is useful and memorable for the new employee.
Help with engaging your new employees into the U's culture	Offers opportunities for new employees to meet other new employees at a variety of venues and times, thereby involving new employees in the culture of the University from an early date. This fosters early engagement and will reduce the chance of attrition and early turnover.
Engage your new employees with different departments throughout the University	Offers an approved and systematic method for introducing your new employees to different departments throughout the University, so you can focus on more job-specific tasks and training needs. Provides a contextual structure for your newest staff members, allowing them to get up to speed more quickly about the University's business processes and organizational infrastructure.

University of Minnesota – Twin Cities Onboarding Program Description and Overview

Program Description and Overview

The new onboarding program at the University of Minnesota Twin Cities campus is designed to bring the University's newest employees up to speed, while actively involving and engaging them with campus culture.

The on-boarding program will help ensure that those who are "New to the U" feel as much a part of the University culture as those who have been employed here for years. The program aims to develop an employee's:

- understanding of the University,
- how we do business here,
- our policies and procedures, and
- fun and exciting elements which make this place home to so many students, staff, and faculty.

Designed with development and engagement in mind, training sessions and modules are held throughout an employee's first year on the job. Each training activity covers a new topic, opening up a new opportunity for learning for the employee.

As an employer, the University of Minnesota takes pride in its employees, seeking to recruit and retain top-notch faculty and staff.

The University of Minnesota aims to provide both a supportive and welcoming environment to its new staff and faculty, with the goal of gradually bringing them into the unique culture of the University.

Different components of the year-long program include:

- a focus and history on the University,
- diversity training,
- professional and personal development opportunities,
- job-specific trainings, and
- communications trainings.

"I appreciate the opportunity to meet and get involved with other individuals. This may not happen if we don't reach outside our own units."

- U of M Employee

Who is Involved?

The University's onboarding program is set up and conducted by the Office of Human Resources (OHR). However, numerous professionals from throughout the University are featured throughout the different areas in onboarding program, giving your newest employees an opportunity to learn from different subject matter experts from various departments around the University.

Departments used throughout the full, year-long onboarding program include:

- Office of Human Resources and New Employee Orientation Staff (OHR)
- Council of Academic Professionals and Administrators (CAPA)
- Civil Service Committee (CSC)
- Office of Equity and Diversity
- Wellness Collaborative
- Organizational Effectiveness (OE) from Office of Human Resources (OHR)
- Office for Public Engagement
- Office of Information Technology (OIT)
- Center for Teaching and Learning (CTL)
- University Relations (UR)
- Union group representatives (AFSCME)
- University of Minnesota Libraries

"I really appreciated the blend between resources for work and life outside of work in each presentation."

 $-\ U\ of\ M\ Employee$

University of Minnesota – Twin Cities Onboarding Program Timeline and Details

Schedule and Timeline

Working in tandem with the unit-level traditional new employee orientation, the central onboarding program is comprised of sessions, job trainings, and social modules. The full timing of the program is an employee's first year in their new position, starting with the first program occurring in their first month of employment.

Central OHR Onboarding Sessions

The main sessions are designed to give the employees baseline knowledge to help them in functioning in their jobs. Starting at the first few months of employment and continuing throughout the first year, these are formalized training programs offer a wealth of knowledge and exposure to critical elements of the University as an employer.

• Discover the U: Who We Are, Where We're Going

Takes place within the first three (3) months of employment start date. The focus of this session provides a quick introduction to the University, giving an overview of the mission and strategic vision of the University as providing a gentle warm-up to the culture found here and equipping new employees with basic University knowledge, which is not typically learned on the job or at the departmental level.

• Discover Community: Building our Diverse Community

Takes place after six (6) months of employment at the University. The focus of this session is on diversity, equality in the workplace, access to everyone, and inclusiveness. Conducted primarily by the Office of Equity & Diversity, this session discusses the University's position on diversity, beliefs on diversity, and provides resources available to employees.

"The first main session was very helpful to see the larger views of the University system."

- U of M Employee

"This was the most helpful diversity presentation I've ever attended."

- U of M Employee

• Discover You: Personal and Professional Development Opportunities

This is the final session in the series of three (3) sessions, conducted at the end of the first year an employee has been with the University. With a reception style and flair, this final session focuses on the employee's professional and personal development, as well as provides recognition for the employees who have completed the full training series during their first year of employment at the University. Topics covered in this session include professional development, technology, public engagement, and wellness.

Job Trainings

Job trainings are generalized sessions which offer your newest employees an opportunity for a greater understanding about their job, resources available to them, and communication within a higher educational setting. There are three kinds of job trainings, detailed below.

New employees are encouraged to participate in all three:

Job-Specific Trainings

Job trainings vary by an employee's position and are typically held throughout the year, depending on the overall need. Selected trainings are run by the specific department with the content expertise and sessions are marketed through central human resources. Employees sign up for the module which is most relevant to their job category/classification.

Examples of these are Human Resources, Communications, Research, Teaching, and Information Technology. Other sessions are conducted either by central HR staff or appointed subject matter experts, on behalf of central HR.

• The Libraries and U

This module – open to all interested employees, not just new employees – is to provide a working knowledge of the University's extensive library system, including its resources and search engines, such that the employees gain an understanding of what is at their disposal in terms of resources for their job positions (if required) or their own edification.

Communicating at the U (New!)

This is a new, three-part series, which will focus on communication at the University, including the hidden dynamics between communications of different levels of employees. The three parts include topics such as communication differences, communicating with stakeholders, and general communication at the University.

Social Modules

As many people know, the University can be an exciting place to work, boasting an atmosphere of arts, culture, sports, and education. The onboarding program's social modules aim to engage the newest working members of the University community by encouraging this aspect of the University culture.

• Brown Bag Fun Lunches

Held on a monthly basis and over the lunch hour, these sessions aim to give the employee a structured opportunity to socialize with others outside of their department. Each lunch time has a different focus, often with a lecture followed by a relevant tour to a yet-to-be explored area of the University.

Culture Crawls

Held monthly during the school year, these sessions highlight the University's cultural side, by focusing on the University's arts, theater, and more. Employees can bring guests to these events, as the timing varies depending on the venue.

"Culture crawls are great – repeat them often so I can attend the ones that were full or when I had conflicts."

- U of M Employee

Gopher Go

No Big Ten school is complete without athletics! The Gopher Go session allows the newest employees discounted rates to see sporting events and hear from different people affiliated with the University's athletic teams. The timing for this session varies by event and availability.

Support and Collaboration Enhancing Your Orientation Process

Role of Office of Human Resources (OHR)

The Office of Human Resources will work to set up all of the sessions and modules.

- Once your employees have signed up for their first New Employee Orientation, their names and contact information will be collected and follow-up with be made directly with them via email from OHR.
- Invitations to participate in different events will be sent out per their start date of record and will be timed accordingly.

Please encourage your employees to attend the sessions and modules and allow them the time from their jobs to do so. Employees who are discouraged to attend may start to disengage from the University and their department. Additionally, the content missed in the training sessions and modules will need to be picked up from other means 'on the job', often on an as-needed basis.

Process: Enrolling Your New Staff

Enrollment in the onboarding program is simply a matter of having your employees sign up for "New Employee Orientation".

Have your employees log in at this page: http://www1.umn.edu/ohr/newemployee/index.html

They will need their X.500 and their password to log in at this site. Please make sure that your employees have this information readily available.

Once they have signed up for their first session, enrollment in subsequent sessions will be automatic, as it is organized through the Office of Human Resources. Their job-specific trainings will be arranged accordingly, as will their initial introduction to their union representatives, if applicable.

The only accommodations for the onboarding program you will need to make is to allow your employee the time to attend the events, encouraging them to do so.

Support Provided to You

As a manager, you have many resources available to you. Following are resources which are available to you:

- Explore the New Employee Orientation web site: http://www1.umn.edu/ohr/newemployee/index.html
- Attend a "Keys to Supervision" Training and encourage your supervisors attend this training as well. This
 interactive session teaches about fostering a positive climate for new hires and highlights the best practices
 for bringing them on-board successfully. Training schedule for "Keys to Supervision" is found here:
 http://www1.umn.edu/ohr/supervisors/keys/index.html
- Use the Managers' Checklist included in this toolkit to help you ensure you are getting your new employees off to a great start. (See Appendix A)

University of Minnesota – Twin Cities Questions and Resources For Additional Information

Questions?

New Employee Orientation

Phone (General) 612-626-3490

E-mail <u>newemployee@umn.edu</u>

New Employee Orientation http://www1.umn.edu/ohr/newemployee/index.html

NEO Ning Networking Site http://newumnemployee.ning.com

Office of Human Resources (Communication):

Stacy Doepner-Hove
Onboarding Program Manager
Office of Human Resources, Communication
doepn002@umn.edu
612-624-5866

Website Resources

New Employee Orientation http://www1.umn.edu/ohr/newemployee/index.html

Supervisory Development

Keys to Supervision Training

• Core Supervisory Skills Training

http://www1.umn.edu/ohr/supervisors/index.html

NEO Ning Networking Site http://newumnemployee.ning.com

University of Minnesota – Twin Cities References and Resources For Further Reading

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Transformational Leadership Project, New Employee Orientation Redesign, University of Minnesota

Appendix: New Employee – Manager's Checklist





NEW EMPLOYEE ORIENTATION

University of Minnesota

Driven to Discover

New employees are a tremendous asset to the University community. The University's employees are our most critical investment in achieving our vision, mission, and goals.

Long term retention of any new employee starts at recruitment. Now that you have your new employee recruited with a planned start date, you want to foster their (and your) success. Use this checklist to ensure that you have all of the needed elements to help get your employee off to the best start possible. Some things on the checklist may appear more than once. If you have already completed them, check them off again as you move down the list.

Before the Start Date	
Schedule and Job Duties	
☐ Call employee	 □ Confirm start date, place, time, dress code, parking, etc. □ E-mail follow-up on I-9 (initiates Internet ID), W4, and new employee checklist on the OHR website □ Give new employee their U of M ID number
Set up meetings with critical people for the employees' first few weeks	Add to new employee's calendar
Have a copy of the job classification guidelines/regulations ready	Guidelines may include bargaining unit, civil service, P&A, faculty, etc.
Create action plan/tasks for the employee's first day	If appropriate.
☐ Put together welcome packet from the department and include:	□ Job description □ Welcome letter □ Job manual or employee handbook (if available) □ Job classification guidelines □ Contact names for the department □ Schedule for first week □ Benefits packet □ Information on pay statements and direct deposit □ Department/unit organization chart □ Department/unit phone/email list □ Map of campus with building highlighted □ Parking and transportation information □ Probation information (if appropriate) □ Mission/vision and guiding principles for U and department/unit (if appropriate) □ New Employee Orientation invitation □ HIPAA and FERPA (if appropriate) □ Student development outcomes (if appropriate)

Socialization	
Notify your department of the new hireSend via email to departmentCopy the new employee, if appropriate	☐ Include start date, what their job will be, and employee bio
Assign a mentor or buddy	If appropriate.
☐ Arrange for a campus tour	☐ Provide map and tunnel walking guide map
Benefits	
☐ Contact your HR professional	 □ Obtain benefits packet and information □ Determine needed payroll information □ Submit payroll documentation
Work Space	
Clean the work area	
Pull together basic office and/or desk supplies	Make welcome sign (or card) and have department members sign it.
Have key made/order card access (if appropriate)	If appropriate.
☐ Verify working computer	If appropriate.
Order business cards, name tag, and name plate	If appropriate.
Technology Access and Related	
☐ Order computer	If needed.
☐ Contact computer tech team to have the system set up in advance	Consider software needs of the job such as: Calendaring system (UMCal, Meeting Maker, other) E-mail platform Daily software needs Printer connections Departmental portal and network access
☐ Arrange for phone installation	If appropriate.
Submit requests for access to Enterprise-wise system software	If appropriate.
Submit P-card and travel card requests	If appropriate.

Training/Development	
☐ Enroll the employee in the New Employee Orientation program through central OHR.	Look here for a schedule of trainings: www.umn.edu/ohr/newemployee
☐ Arrange pertinent trainings required for the job.	Examples could include: PeopleSoft WebVista HIPAA UTTC/OIT Credit card processing/security Specialized software
Additional:	

Employee's First Day	
☐ Welcome them upon arrival	Understand that they may be nervous; try not to overwhelm them.
Provide overview of the first day and work week	
☐ Introduce them to department and team members	 □ Introduce mentor or "buddy" (if using one) □ Break/lunch areas □ Restrooms □ Building access cards/keys
☐ Provide welcome packet and take time to discuss contents	 □ Review contents of welcome packet and give them time to look through it on their own □ Customer service standards and philosophy □ Discuss how to sign up for benefits and review pay statement □ Onboarding schedule and timeline □ Have them sign up for New Employee Orientation □ HIPAA and FERPA (if applicable) □ Start times/end times and time cards (if appropriate) □ Relevant websites
☐ Introduce them to work area	 □ Supply them with key(s), ID, or other items to gain access to office □ Show them how to order office/desk supplies □ Show them where to obtain U-Card □ Overview of software and other technology use (calendar system, phone/voicemail, computer, email, internet, departmental portal, etc.) □ Provide employee ID number □ Show them X.500 login □ Safety procedures/policies (if applicable) □ Introduce them to email system □ Introduce them to the office computer network (shared files and/or drives) □ Show them how to use the copier
☐ Introduce them to the department/unit	 □ Take them on a tour of the building □ Show them elevators, stairs, exits, restrooms, kitchen area (if available), break room (if available), lockers/closets (if available) □ Show them copy room, office supply area, mail area □ Introduce them to key departmental people, such as mailroom staff, payroll staff, etc. □ Show them how to open/close office (if appropriate) □ Provide tour of different area(s) of campus, as appropriate to their position

Arrange to bring them to lunch on the first day	☐ Include other employees if possible
☐ Review department and/or job classification policies	 □ Process and recording for sick leave, sick child, and vacation time/requests □ University calendar, holidays and religious holidays □ Dress code □ Emergency procedures □ School closings □ Security protocols and building hours □ AFSCME/Teamster/Civil Service/P & A information □ Student development outcomes (if appropriate) □ Overtime and comp time policies (if appropriate) □ Probationary period/tenure period □ Phone and computer use □ Timecard procedures (if appropriate) □ Department traditions and recognition events □ Online resources for additional information, such as New Employee Orientation website □ Percent time for new employee and what hours will be
☐ Discuss transportation and parking	
☐ Review job description	□ Discuss expectations for job□ Review first week schedule
☐ Have them complete any required forms	☐ Computer system access ☐ W4 ☐ I-9 ☐ Direct deposit ☐ Others:
☐ Give them their first assignment	Make it small and doable so they feel like they have already accomplished something
Additional:	

First Week	
☐ Show them training schedule	□ Pre-schedule trainings if possible□ Talk about overall training timing
☐ Show them NEO (onboarding) schedule	☐ Sign them up for first session (this will instigate consecutive sessions and trainings associated with this program)
☐ Technology check-in	 □ Verify working computer □ Departmental access/portal □ Printer hook-up □ Software needs □ E-mail □ Calendar □ Phone/voicemail □ Other requirements
Review org chart for the department	
Meet or touch base with new employee daily to answer questions	 ☐ Inquire how first week went ☐ Make time to listen to any questions ☐ Encourage them to ask questions ☐ Explain your work style and discuss how it will fit with the style of the new employee
 Provide list of current department projects and cyclical programs, highlighting roles of other department members 	
 Inquire if questions on benefit and pay statement (if appropriate) 	
☐ Discuss University employee websites and resources	 □ Employee Online Directory (required for all) and directory suppression function □ U Portal □ Employee Wellness Program □ Employee Assistance Program □ Ergonomics worksite consultation □ Disability Services □ Rec Center □ Libraries □ UTTC/OIT Training □ Training and Organizational Development □ Vehicle and Travel Policy □ Online HIPAA training information and schedule □ Regents Scholarship

☐ Complete required personnel paperwork	 Ensure that employee has completed required paperwork as well I-9 W4 HR Information Form Timecard HIPAA/FERPA data privacy (if appropriate)
☐ Complete other required forms, as needed	□ P-card □ Travel card □ Other
☐ Discuss training policies and procedures	□ Who to contact□ Where to go with questions□ Online options
Additional:	

First Month	
☐ Weekly or bi-weekly meetings with new employee	Answer their questions and help foster engagement with the organization
☐ Check in about benefits and pay statement	 □ Ensure that they have access □ Answer any questions that they have □ Ensure attendance of benefit and retirement tutorial
☐ Ensure participation in the NEO programs	☐ Check on timing of first session, if not yet occurred ☐ Inquire how first session went, if attended
☐ Discuss process for reviews	
☐ Review performance standards	
☐ Review job description	
☐ Discuss job rules and regulations	
☐ Check in on mentor/buddy	☐ Talk with mentor/buddy (if appropriate) ☐ Talk with new employee about mentor/buddy relationship (if appropriate)
Additional:	
First Three (3) Months	
☐ Ensure participation in NEO program	☐ Inquire how first session went, if not yet discussed
☐ Performance appraisal	☐ Can be informal ☐ Check in with employee to let them know how they are doing
☐ Determine performance goals	☐ Both short term and long term
☐ Check in with questions	
Additional:	

First Six (6) Months	
Ensure continued participation in NEO program	Employee should have completed two (2) sessions by this time or be close to completion of two (2) sessions.
☐ Performance appraisal	☐ More formal☐ Document for probation purposes
Determine performance goals (continue)	☐ Both short term and long term
Check in with questions	
Additional:	
After Probationary Period	
Celebrate the end of the probationary status	
Schedule annual performance review	If not already completed.
Check in with questions	
Additional:	

