Managers/Supervisors Guide for Onboarding New Employees

MESSAGE FOR MANAGERS/SUPERVISORS

Congratulations on your new employee!

This guide has been developed for managers/supervisors to support an effective and successful onboarding process for employees that are new to the institution(s) or that have recently been promoted to a new role. The manager's/supervisor's importance in onboarding cannot be overstated. As a supervisor, it is your privilege and responsibility to welcome your employees to The Ohio State University at Newark and/or Central Ohio Technical College and introduce them to the culture and values of your campus/college.

> *A successful onboarding program makes a positive impression on a new employee and creates a welcome feeling, which confirms their decision to work for Central Ohio Technical College and/or The Ohio State University at Newark.*

This guide provides an overview of onboarding. It contains information, resources and tools which can be used as a starting point for successfully acclimating and developing new or recently promoted employees.

Central Ohio Technical College (COTC) and The Ohio State University at Newark strive to create a positive working experience where employees are informed and engaged and have strong working relationships with their manager/supervisor and colleagues. The foundation for this environment can be created through onboarding.

If you have any questions regarding new employee orientation and onboarding, please contact the Newark campus Office of Human Resources.

Contents

WHAT IS ONBOARDING?

Onboarding is more than completing new hire paperwork or attending an orientation. Onboarding is a collaborative, strategic approach that provides *new employees and/or recently promoted employees with the needed information, tools, and resources to effectively meet institutional goals.*

Onboarding aims to:

- *Increase* new employee *productivity* by providing information about the institution(s) and their respective cultures.

- *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.

- *Provide audience-specific, in-depth, and timely information* over an extended period of time so that information is useful and memorable for the new employee.

- *Streamline processes* and provide best practice information to enable managers/supervisors to deliver high-quality, consistent, and accurate information systematically to all new employees.

- *Foster* an environment of *employee engagement* where employees feel that the COTC and Ohio State Newark are great places to work.

Onboarding Model

Below is COTC's and Ohio State Newark's model for onboarding new employees. Offices may choose to expand on the model, adding more acute and relevant position/work-related information. The time periods may occur differently for you and your new employee, at your discretion within the 12-month period.

PRINCIPLES				
Align to Mission & Vision	**Connect** to culture, strategic goals & priorities		**Integrate** across owners	**Apply** to all employees

PROCESS PHASES AND KEY ACTIVITIES				
BEFORE FIRST DAY	**FIRST DAY**	**FIRST WEEK**	**FIRST MONTH**	**6-MONTH/YEAR**
• Confirm position information verbally and in writing • Connect with employee to review logistics regarding First Day • Refer employee to New Hire paperwork • Prepare for employee	• Welcome by team • Incorporate senior leadership • Focus on sharing the mission and values • Meet immediate requirements for employment • Communicate resources or networks required for work	• Ensure direct supervisor/ managerial involvement • Orient employee to institution and office norms • Assign meaningful work • Introduce employee to Sponsor (if new employee desires) or Mentor (faculty) • Provide resources and training	• Monitor performance and provide regular feedback • Set performance expectations as well as Performance and Development Goals • Provide essential training	• Recognize positive employee contributions • Provide formal and informal feedback on performance • Set future performance and development goals • Seek professional and personal development opportunities

OUTCOMES			
High **Job Satisfaction**	**Retention** of high performers	**Employee Engagement** and commitment	**Efficiency and productivity**

Adapted from San Mateo County Strategic Onboarding Model

Onboarding Roles and Responsibilities

Successful onboarding is a collaborative effort across the entire college/campus. Each office, department, director, manager/supervisor and new employee has a responsibility to ensure that our new employees' first days, weeks, and months on the job provide a successful beginning to their careers. Employees who have been promoted to a new role should also be onboarded. It is critically important that we provide them with the foundation, tools, resources, and organizational perspective that ensure their rapid integration within our workforce and our culture. The goal of this partnership is to establish a long-term relationship with the employee that begins even before the employee is hired.

OFFICE/DEPARTMENT HEADS

- Set the strategic direction for the office/department.
- Share and live the institutional values.

MANAGERS/SUPERVISORS

- Create an engaging environment, coordinate with office/ department staff to arrange work place.
- Connect employees to colleagues.
- Clarify your expectations up front, in writing.
- Conduct regular "one-on-one" meetings.
- Provide timely, information-specific, issue-focused coaching and feedback.
- Set office and job-related context and share technical job-related expertise.
- Inform employees about institutional and departmental goals and culture.

> **33%**
> Of respondents in a 2014 HR Survey conducted by BambooHR said that managers/supervisors have the greatest influence on whether a new-hire onboarding is effective.

HUMAN RESOURCES OFFICE

- Gather essential new hire paperwork (e.g., I-9, tax forms, direct deposit, etc.).
- Ensure required documentation is received and reflected in the appropriate system / file.
- Inform about benefit options and host benefit workshops.
- Provide institution-wide training.
- Conduct New Employee Orientation.
- Share institutional information and context.

INFORMATION TECHNOLOGY SERVICES (ITS) OFFICE

- Upon request, set-up software / applications/ equipment (e.g., network access, email, etc.).

NEW EMPLOYEE/EMPLOYEE RECENTLY PROMOTED TO A NEW ROLE

- Actively participate in their own onboarding.
- Be engaged and ready to embrace new ways of doing work and adapt to new office norms and work styles.
- Complete all required paperwork, attend any required training, and work proactively to develop relationships and seek the resources and information needed to do their job.

Before the First Day

Retention starts at recruitment. Hiring the right candidate is the first step in the onboarding process. Once the candidate accepts the position, the manager/supervisor should begin planning for the new employee's first day/week. A great deal of the work necessary to successfully onboard a new employee is done before the employee's first day. Some of the suggested actions to "prepare" for a new employee are listed below.

Prepare for the Employee's First Day/Week

First impressions matter. It is important for managers/supervisors to adequately plan the essential activities for the new employee's first day (and weeks) by coordinating and/or scheduling critical appointments and meetings [e.g., team members, department heads, subject matter experts (SME), system administrators, committee and team meetings, etc.].

While in many instances the majority of on-the-job training and development will be provided by the employee's direct manager/supervisor, SME's can also be valuable resources in the onboarding experience. SME's can provide training on specialized, department, industry, or job-specific software applications, program and policies, as well as position and operational functions.

In addition to scheduling appointments and job-specific training, managers/supervisors should gather links to important websites, as well as resource manuals, handbooks and guides which may assist the new employee in understanding their work and understanding essential information required to perform their job.

New regular faculty members are assigned a faculty mentor. Managers/supervisors must ensure that a mentor is assigned. For staff, managers/supervisors may want to consider assigning a sponsor to a new employee. A sponsor is someone who partners with the new employee during the first six months/year of employment to offer advice, guidance, knowledge, and resources regarding the day-to-day aspects of working for COTC, Ohio State Newark and/or the new employee's immediate work environment.

> *The assignment of a sponsor is not mandatory and should only be provided if the new employee chooses to have one assigned. Ask your new employee if she/he is interested in having a sponsor.*

A sponsor should be a superior performer with strong people skills and should be someone who the new employee can trust. Part of this role is to create a comfortable, more informal environment in which the employee can ask and receive information about the institution's culture and norms, including those everyday (mostly unwritten) processes that help to explain how things really work.

Finally, a major goal of the sponsor is to establish a sense of belonging for the new employee. With an effective sponsor, each new employee will quickly become a contributing member of his or her new department.

Organize and Prepare the Workspace, Equipment, and Tools

A clean and organized workspace, with properly functioning equipment, is an important element in ensuring the employee can be productive, efficient, and effective as quickly as possible. Gathering basic office and/or desk supplies, collecting physical keys to cabinets, office, and/or building, as well as verifying a working phone, computer, and/or other equipment can create a smooth first day and make a good first impression.

Equally important is ensuring the employee has access, including User IDs/account numbers, temporary password

information to voicemail, essential directories, systems, and applications. If the equipment is unavailable, or needs replacement or repair, coordinate with the appropriate parties as quickly as possible (see the ITS New Employee Orientation Packet located on the portal).

Put together Welcome Packet

In order to organize you and the new employee, you may wish to put together a Welcome Packet. A Welcome Packet can contain useful information for the employee to review, and can serve as an organizing tool for the manager/supervisor about what fundamental material should be covered with/by a new employee. Suggestions on what can be included in a Welcome Packet are provided on the [Manager's New Employee Onboarding Checklist](#).

Notify others of the new hire

Because onboarding is a collaborative effort, it is important that the manager/supervisor contact departmental and other staff to notify them of a new hire, and determine what information, if any, is needed. This is also an opportunity to discuss how and what they will be communicating to the new hire.

In addition, colleagues are more likely to assist in onboarding if they are informed of a new hire. Sending an email to colleagues and partners (and campus-wide, if appropriate based upon the level of the position) regarding a new hire not only lets them know who is starting and when, it also welcomes the new employee.

Some useful tips for drafting a new hire announcement to staff and faculty are:

> **Be Upbeat** – share your excitement for the new hire.

> **Be Brief** – provide background, such as the employee's name, position, start date, what their job/role and responsibilities will be, where the employee will be located (and contact information, if known), as well as a brief employee bio.

> **Be Collaborative** – encourage colleagues to say, "hello," and welcome the new employee to the team, and acclimate them to their role.

Connect with the new employee before their first day

Before the employee's first day it is important to touch base to confirm first day details and answer any questions they may have. Some of the important information to convey is included in the [Onboarding Checklist](#).

The First Day

The focus of the first day(s) and week(s) is primarily to introduce the new employee to the people, processes, and systems they will interact with and the physical environment and organizational structure in which they will work. Make the first day a compelling and valuable experience. Every supervisor and manager orients new employees differently, but all are encouraged to include the following elements in onboarding during the first day on the job.

Welcome them upon arrival, provide tour and an overview of what to expect

One of the most crucial aspects of employee onboarding is welcoming them upon arrival. The first minutes of the new hire's first day can set the tone for the entire day. It is essential to make sure someone (ideally the manager/supervisor) is there to greet the new employee upon arrival, to acquaint them to the environment, review what to expect in the first day and week, and where to find resources and information. You may want to consider involving all department members in the welcome and taking the new employee to lunch on the first day.

Managers/supervisors typically have a comprehensive amount of information to share with an employee on the first day. Creating a Welcome Packet (see page 5) can ensure that the majority of the information is available, in printed form, for the employee to review during their first day and week on the job. Managers/ supervisors can also direct new Ohio State Newark employees to the New Employee Website and COTC employees to New Hire Resources for important and relevant information for new hires.

Review operations, organizational structure, associated goals, programs and services

New employees need to understand the operations in their immediate environment and the organizational structure of the institution, department, and office/team. It is also important that employees know the goals of each of these areas. Knowing the structure provides guidance on "the big picture" by introducing how departments work together toward a common purpose. Also, it identifies the people, positions and programs involved in achieving the mission, vision, and goals.

In addition, providing the employee with a list of current department projects and cyclical programs, and highlighting their role and the roles of other department members are additional tools that enable the new employee to see "the big picture." Associating the projects with work plans/timelines can also be helpful to enable the employee to understand deliverables.

Onboarding is also about connecting new hires with employee work life benefits, programs and services [e.g., Your Plan for Health (YP4H), educational assistance program, employee assistance program (EAP), and deferred compensation programs.]

Schedule regular one-on-one meetings, starting with day one

At the end of the first day and each day in the first week, schedule time to check in with the employee to inquire how the day went. Encourage the employee to ask questions, and allocate sufficient time to listen and address questions. Use this time to get to know the employee better (e.g., explore work styles and how the work style will complement each other and the work of the team.)

Regular meetings with employees should continue. The frequency of meetings may decrease as the employee becomes more accustomed to the environment and familiar with their role; however, managers/supervisors are encouraged to meet with their staff at least every two weeks.

The First Week

During the first week on the job, the employee should be given information that will assist them in feeling comfortable with their responsibilities, the environment, team members, and you—their manager/supervisor. Having the right information will make the employee feel equipped and able to make meaningful contributions as quickly as possible.

Review first week schedule

At the start of the first week, it is important that managers/ supervisors review the schedule of appointments, including job-specific training. Managers/supervisors should discuss any timing and/or due dates associated with the training, and set aside time at the end of each day to check-in with the employee.

Ensure that the new employee has meaningful work to do in the first week. The new employee should be able to spend some or all of this week engaging in purposeful work, seeing resources required to perform work, and acclimating to the job and surroundings.

So you want to know what new hires really want in the first week?

76% On-the-job training is most important

73% Review of company policies

59% Company tour, equipment setup and procedures
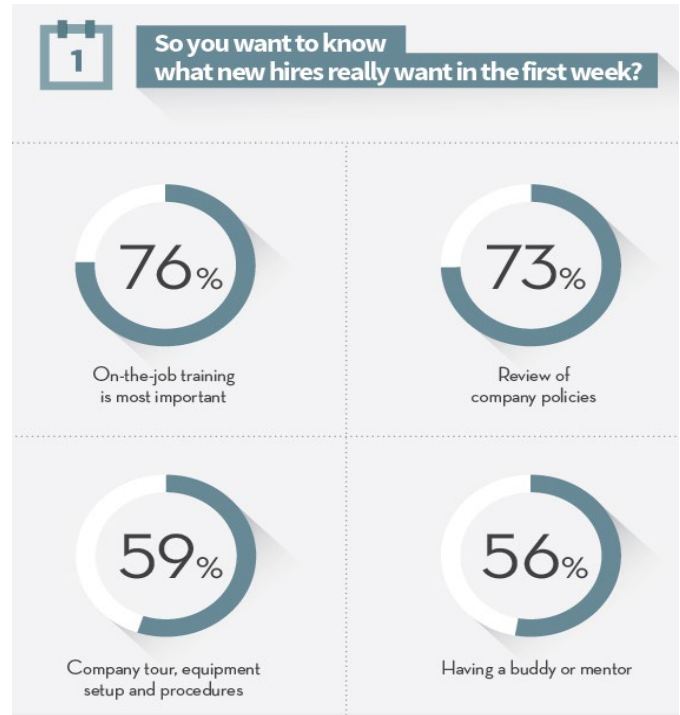
56% Having a buddy or mentor

The first week is a great time to have new hires complete required training and to review institutional policies and procedures. For employees holding supervisory/managerial appointments, provide information on responsibilities as a supervisor for processes such as Family and Medical Leave Act notification, performance management, time approval, and purchasing/budget requests and approvals.

Checking in at the end of each day during the first week allows for the manager/supervisor to provide additional resources and information, as well as answer any questions a new employee might have about their work, environment, and/or expectations. It also allows the employee to keep the manager/supervisor aware of their progress.

Ensure employees have the tools to be successful

During the employee's first week, the manager/supervisor should verify that the new employee has the tools to be successful. Tools can be ensuring the employee is properly connected to the systems and equipment coordinated prior to their arrival, and that they have the information needed to perform work.

In addition, managers/supervisors should ensure the employee is able to: use the email and voicemail system, access information on the various network drives, use the internal portal(s) and external websites, update their information in Workday (Ohio State only), navigate the automated time keeping system, and learning management system (LMS), if appropriate.

The First Month

During the first month employees begin to grow and develop their skill set and knowledge base, and begin to assume a regular workload. This period is critical to forming employee perceptions about the organization and position. Managers/supervisors should use this period of time to establish the foundation for a solid working relationship.

Ensure onboarding tasks are completed

The new hire benefits enrollment period begins immediately after an employee is hired. New employees have a limited time (30 days from date of hire) to elect their benefits. During New Employee Orientation, the Office of Human Resources with assist   employees in deciding which benefits options best meets their needs. Managers/supervisors should encourage new hires to review the [Benefits Overview Website](#).

In addition, within the first week new employees should review and acknowledge the Institutional and HR policies available on the respective websites. Managers/supervisors should ensure that new employees complete these tasks and answer, or direct the new employee to the appropriate party, any questions the employee has regarding the policies.

Hold regular one-on-one meetings

Regular meetings provide dedicated time for manager/supervisor to discuss performance/goals, share informal and formal information, and provide value-added feedback and coaching. One-on-one meetings can also be an opportunity to discuss how the employee can continue to grow and develop by taking advantage of institutional training and development opportunities, such as instructor led and online training. Additionally, for those wishing to further their academic development, the institutions offer tuition reimbursement programs (information available on the HR policy websites).

Managers/supervisors can also promote opportunities for benefits-eligible employees to participate in the Your Plan for Health ([YP4H](#)) wellness program. A full list of Health and Wellness opportunities is available on the [YP4H](#) website.

Discuss performance management process and establish initial performance and development goals

COTC's and Ohio State Newark's performance management philosophy strives to provide each member of the institutions with clear performance objectives, ongoing coaching and feedback, professional development, and recognition for outstanding work. Effective performance management is a shared responsibility between the employee and the manager. The process aims to develop trusting, communicative relationships between managers and employees, to increase productivity and enable employees to reach their full potential.

The performance year for staff runs from May 1 through April 30. Two mid-year check-ins during the performance year are recommended for all staff and are required for CWA bargaining unit members. The form is designed for a year's planning and check-ins to be completed on side one ("performance planning and measures") and that same year's final appraisal to be completed on side two ("overall performance appraisal"). The Performance Planning & Appraisal Form is maintained in your office throughout the year. At the end of the performance cycle, the form is submitted to the Office of Human Resources for inclusion in the employee's personnel file.

The performance management processes for COTC faculty are defined in the [Agreement Between the Central Ohio Technical College and the United Faculty/Central Ohio Technical College, AFT/OFT](#) for regular COTC faculty and the [Faculty Appointments and Review Procedures for The Ohio State University at Newark](#) document for Ohio State Newark faculty. Both of these documents are available on the respective websites.

Check in on the onboarding experience

Once an employee has been working for a while (usually one to three months), it is a good idea to check in on their onboarding experience.

Questions managers/supervisors may want to explore may include:

- Do you feel prepared for and able to do your job? If not, why? What do you need to feel more prepared?
- Do you have all the tools you need to do your job?
- How has the "sponsor" worked for you? (if applicable)
- Is there anything else I can assist you with?

The Third Month

During the first 90 days, new employees should begin to acquire a full workload while managers monitor performance and provide early feedback. Like the first day, this period is critical to forming new employee perceptions about the institution(s) and job. Along with ongoing feedback, the manager/supervisor should meet with the new employee to discuss the employee's performance to date. The meeting should acknowledge an employee's growth and development, as well as indicate areas for additional focus in the coming months. For staff, this meeting serves as one of the mid-cycle performance management "check-ins" or "feedback sessions." During these meetings supervisors should provide coaching and progress reports on established objectives, modify any objectives as needed, and document the meeting for performance management purposes.
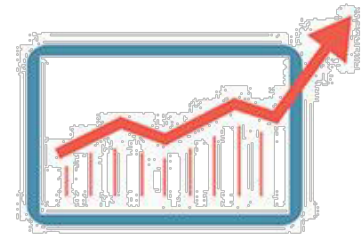
Six Months / Year

Congratulations! Your new employee has hit the six-month mark in their employment. The first six months of employment are crucial to an employee's retention with an organization. Take time to breathe deeply, recognize the accomplishment, reflect on the successes and contributions of the employee, and get ready for the time ahead!

After the first six months, initial excitement about being part of a new institution may wane. Managers/supervisors need to continue to develop employees to ensure they are connected and committed, that their opinions matter, and their contributions are being appreciated and recognized.

Performance Check-In

In addition to providing regular coaching and feedback, managers/ supervisors should conduct a performance check-in during the sixth to eighth month. This is an opportunity for the manager/supervisor and the new employee to take time to assess what they have done well during this period, and what can be improved upon.

Regular evaluations continue for all employees on an annual basis. Annual evaluations allow for collaborative discussions between an employee and their supervisor/manager to: provide coaching and feedback; reflect on previous performance; set future performance and development goals; establish clear expectations; and, acknowledge contributions and address areas for growth.

Effective onboarding *increases* performance by up to **11.3%**

TTI Success Insights (2015)

Set performance and development goals

The completion of the annual performance review also signals the beginning of the next evaluation period. As part of the performance management process, supervisors/managers complete the appraisal of the employee's performance over the course of the year and then establish performance and professional development goals for the next review period. Where the goals for the first year of employment may have focused on learning and new skills, the goals for the next review period may focus on the putting the new skills and information to work.

Check in on the onboarding experience – six months

Once an employee has been with the institution(s) for six months, they should have a good idea of the institution as well as their role and responsibilities.

The six-month mark also serves as an opportunity for managers/supervisors to learn more about how the new employee feels they is doing, understanding the employee's onboarding experience, including what went well and what could be improved.