



SHARED
BUSINESS SERVICES
STRENGTH IN NUMBERS

ONBOARDING TOOL BOX

EVERYTHING YOU NEED FOR
ONBOARDING NEW STAFF



Strengthening **Jewish Cincinnati**





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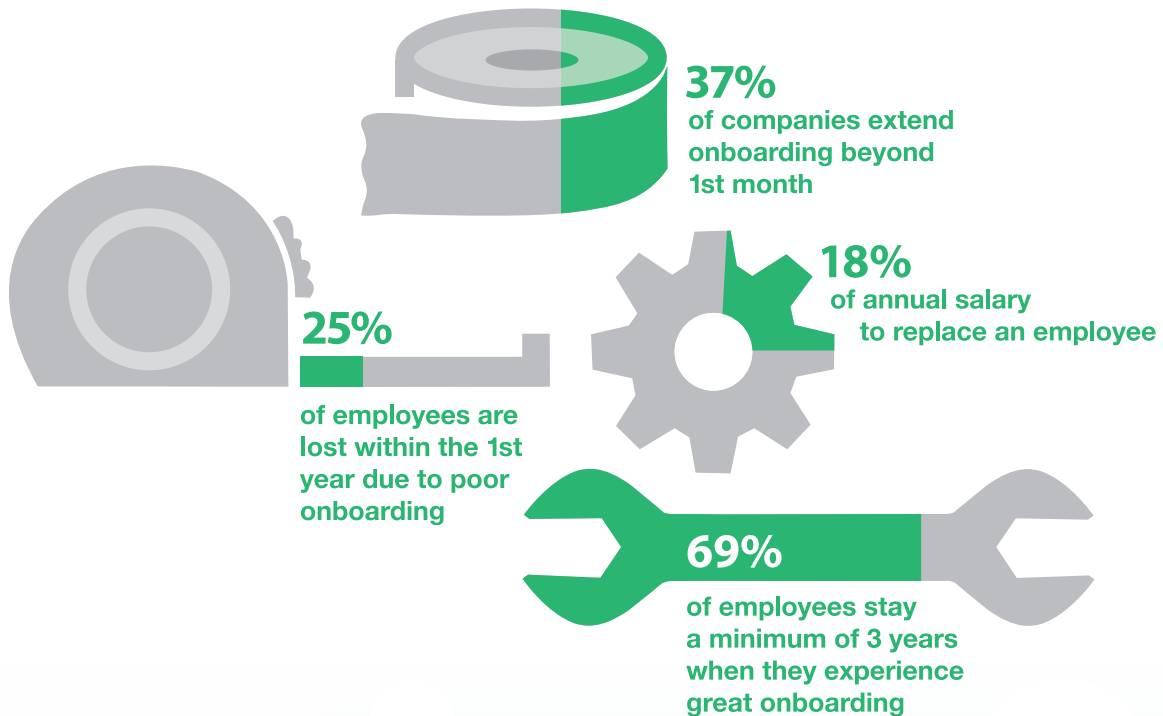
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Why is this important?



When we bring someone into our organization it is our hope to provide a supportive environment, build loyalty, create emotional attachment, and encourage commitment.

Remember



It's important to remember that onboarding is the responsibility of the entire organization, not just HR or the hiring manager. The hiring manager is, however, responsible for making sure it happens.

The entire organization is impacted when new employees arrive, so many people need to be involved in onboarding efforts. **Onboarding, integration, and orientation are NOT the same.** Orientation might occur on the first day or during the first week, to introduce new hires to policies and procedures. Onboarding is a process that socializes new employees to the organization and ensures they have the necessary skills and knowledge to become effective members of the organization. Integration is doing what it takes to make a new person a fully functioning member of the team as quickly and smoothly as possible.

This tool box will guide you through the critical steps and provide you with the information and tools to help you by:

- **Setting up a thorough onboarding schedule**
- **Making a great first impression**
- **Giving ideas for documents to include in your orientation**
- **Suggesting steps you can take to give your new employee some small wins right away**
- **Building strategies for ongoing supervision**

We want our staff to:

- **Connect emotionally**
- **Understand company values – what matters here**
- **Feel welcome**
- **Understand how they fit in**
- **Understand their impact on the big picture**
- **Know they are valued**
- **Feel productive quickly**

Who does what?

Orientation vs Onboarding vs Integration

Orientation will occur on the first day or during the first week, to introduce new hires to policies and procedures. Onboarding is the process that socializes new employees to ensure they have the necessary skills and knowledge to become effective team members. These are the things we do to bring a person safely on board. Integration, especially for those in leadership and key positions, is a collection of activities that help the new staff member to navigate the internal/external networks and gain insight into organizational and team dynamics.



What will HR do? Orient.

What will the hiring manager do? Onboard and Integrate.

Before they arrive you will work with HR to coordinate the following:

- **Communicate the game plan via welcome email** (see sample)
- **Provide necessary paperwork**
- **Get them excited**
- **Provide arrival logistics**
- **Share the plan with the employee**
- **Send out the Welcome email to staff** (see sample)



Employee welcoming tools

New employee introduction email

Dear *(new employee's name)*,

We're so excited that you will be joining our team at *(organization name)*. We know you will be an excellent addition to the *(department name)* and we're looking forward to your official start on *(date)*.

Over the next *(time frame)*, we will be in touch with some information and paperwork to make your first day as smooth as possible.

If you have any questions/concerns in the meantime, don't hesitate to reach out! I'm looking forward to seeing you soon.

(name of sender)

Note: Think about your audience carefully before sending your internal welcome email.

Internal welcome email

Dear Team,

We have a fantastic new team member joining us on *(date)*. *(new employee's name)* will be working in *(department)* and will report to *(supervisor's name)*. Everyone who was involved in the hiring process is confident *(new employee's name)* will be a great fit, and we are eager for *(her/him)* to get started.

(Names of lunch dates) will be taking *(new employee's name)* to lunch on *(day of the week)* and everyone else should feel free to drop by to say hello.

Let's give *(new employee's name)* a warm welcome!
her/his success is our success.

Get excited to greet *(new employee's name)* on *(day of the week)*!

(name of sender)

What HR does

- Complete all necessary HR new hire forms (tax, I-9, policy acknowledgements, etc)
- Complete JCC membership agreement with employee
- Get employee's photo for HRIS/Payroll system
- Get employee's key fob/badge from JCC operations team
- Give employee a parking diagram and review JCC campus employee parking policy
- Review process to requesting paid time off
- Give employee the "Jewish Cincinnati" acronym list
- Give employee the "Guide to Jewish Holidays" document
- Give employees the agency Organizational Chart
- Give employees instructions on how to reserve a huddle room
- Give employees a copy of the agencies' handbook and review key aspects of the handbook at a high level
- Give employees a list of Holiday hours
- Give employees an internal phone extension list
- Give employees instructions on how to use their phone if they're assigned one
- Give employees "Emergency Preparedness Quick Guide" and "Phone Threat Sheet"
- Give employees the dates for the two required trainings:
 - **HR New Hire Orientation:** A required monthly one-hour training given by HR which reviews housekeeping items such as what agencies are on campus, Paycor, IT, Membership, HR policy etc. Employees and Managers must ensure new hires attend this orientation within two months of hire
 - **Quarterly Emergency Preparedness Training:** The Mayerson JCC requires all new hires attend a quarterly new hire emergency preparedness training within three months of hire. This training is typically held on Sunday evenings.
- Review all aspects of benefits programs with new employees that are eligible for benefits
- Inform employees that most all forms mentioned above are available online via Paycor
- Give employees a tour of upstairs if they'll be working in the upper-level. Explain where each agencies' department "lives"
- Explain what SBS (Shared Business Services) is and how it impacts them (i.e. payroll, mileage reimbursement)

JFC

2 Day JFC New Employee Department Orientation Overview: All JFC hires are asked to attend a 2 day (held over two afternoons) to meet with all Directors at the JFC for a presentation on what their department is responsible for. These are held quarterly for all new hires

- Give employees "JFC Orientation Memo" written by Shep, which reviews who the JFC is and what we do
- Give employees the desk "Fundamentals" flip chart and review what the fundamentals are

Now it's up to you—

Take the time to make a lasting positive impression on your new team member with a thoughtful and intentional onboarding experience.

Keep in mind that this is a guide. It will require customization to your agency, department, job requirements and the skills, abilities and knowledge of your new person.



Don't be afraid to experiment and make this an enjoyable experience for everyone.



Helpful checklists

Think about what new hires need at their desks, but first consider adding something special. A desk plant? A welcome sign? A signed card? A box of candy? A personalized mug with the organization's logo?

Physical space checklist

- Desk and chair
- Computer or laptop
- Phone and extension list/staff directory/phone threat sheet
- Setting up voicemail
- Calling out and long distance codes
- How to transfer call and set up conference call
- Keys for building, office, and/or filing cabinet
- Name badge and holder, business cards
- Office supplies (e.g., pens, paper, stapler, etc.)
- Forms, time sheets, expense reports and budget codes
- Handbooks, directories and important materials
- Schwag (e.g., water bottle, t-shirt, pen, journal, etc.)
- Physical mailbox
- Restrooms
- Snacks/coffee

Bonus points

- Set a budget and let them order any other office supplies they may want on the first day
- Put a gift certificate to a local restaurant or coffee shop in their top drawer for a fun surprise!
- Assign a buddy/colleague
- Chat a bit about email/office etiquette

Virtual space checklist

- Email– Setting up email signature. Caution: Do not overwhelm their inbox
- Access to network/logging in
- Access to any shared (on the cloud) folders, documents, etc.
- Access to printers, copier codes, faxes, scanners, etc.
- Help with adding Outlook and Password Manger app to phone for company business (if they wish)
- How to request HELP
- Make sure they are added to all appropriate distribution lists
- Make sure they are given access to any relevant accounts (Paycorp, Blackbaud, and ?)



Best boss ever: Checklist

Set up for success

- Review job role and responsibilities
- Discuss manager style & expectations
- Review performance goals
- Schedule meetings with the key “players” working with the new hire
- Overview of common programs & useful websites
- Explain conference room reservations
- Provide employee directory
- Explain desk setup and how the hire can request needed items
- Schedule weekly 1:1s
- Add new hire to regular team meetings
- Confirm that employee has received and reviewed policies and procedures
- Review holiday lists provided by HR

Map the lay of the land

- Break rooms; refrigerators, microwaves, and Kosher options
- Bathrooms
- Conference rooms
- Photocopy and fax machines
- Supplies and purchasing policies
- Transportation & parking
- First aid kit & emergency supplies

Create a warm welcome

- Prepare a week one agenda
- Make lunch plans for their first day
- Have team sign a welcome card
- Give employee company schwag: tshirts, notebooks, thermos, mug, etc.
- Send welcome email to staff
- Introduce employee to co-workers
- Introduce to department leads and executive teams
- Take a walking meeting outside the office to learn more about the employee’s life outside of work
- Suggest a welcome get together in a meeting room with an planned ice-breaker

Show investment

- Identify the training and development activities new hire needs in the next 6 months
- Sign up for classes
- Suggest influencers to follow
- Identify and access immediate development opportunities
- Identify and set measurable career goals

Help ensure integration

- Help develop an “Elevator Speech”– Who I am, why I’m here, and my role
- Make list of stakeholders to meet both internal and external
- Prioritize that list
- Explain how to best approach stakeholders
- Ask yourself and your team– WHAT IS MOST IMPORTANT FOR NEW HIRES TO KNOW ABOUT OUR ORGANIZATIONAL CULTURE AND POLITICS? – Then share this with your new hire not just once, but regularly
- Help facilitate



Sample schedules

Elements of a successful first day

These might not happen on day one, but try to fit them into the first week.

- 1 Greet new hires at the door**
A friendly face at the door will put them at ease.
- 2 Go over schedule for the day**
Take them to a comfortable space to look over their schedule for the day and answer any questions they may have.
- 3 Introduce new hires to their buddies**
If your new hire has been assigned a buddy, introduce them and give them an opportunity to spend some time together. Consider having the buddy give the new hire a tour. If you have a mentorship program, the mentor can take the place of a buddy.
- 4 Give them a tour**
Show them around, point out the functional areas in the space, show them the office layout, and introduce them to people as you walk around. This is a good time to let them know about any security procedures and protocols, where to find the bathrooms, lunchtime hangouts, and coffee, etc.
- 5 Show them their space**
Take them to their workspace, show them the setup, provide them the logins, and give them some time to settle in. Allow new hires time to complete their paperwork as they familiarize themselves with their workspace.
- 6 Ensure welcome from senior leadership**
Have senior leaders welcome the new hires. Even if it is only a brief meeting, this can make a very positive impression on new employees.
- 7 Give them an overview of the organization**
Go over the mission, vision, and values of the organization. Explain how the organization is structured, what each department does, and how they interact. Give them an idea of how their roles fit into their departments and the organization.
- 8 Take them out to lunch**
Have one person or a small group take them out to lunch. At lunch, the group can share what they wish they knew on their first day, and the best parts of working there, as well as provide information about the neighborhood (where to eat, closest pharmacy, etc.).

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9 Schedule a meeting with human resources

Discuss work hours, overtime, use of paid time off, and the benefits package. Also, go over all policies and procedures related to safety at work, including harassment prevention. Specifically, those coming into jobs that are at a higher risk for harassment (e.g., development roles, leadership roles, manager roles, etc.) should be briefed on the organization's written policies and procedures for reporting and addressing any potential issues. Remind all new hires of when they are scheduled to participate in harassment prevention training.

10 Arrange a check-in with the supervisor

At the end of the day, schedule a check-in with each new hire's direct supervisor. Use this meeting to go over the schedule for the first week, discuss working relationships, and debrief the first day. This is a good time to solicit feedback from new employees about their experiences that day so that supervisors can make sure to meet their needs moving forward.

Sample First Day Schedule

Time	Task
9:30 am	Arrival
9:35 am	Review the day's schedule
9:50 am	Meet buddy and take tour
10:35 am	Set up workspace
10:45 am	Organizational overview
12:00–1:00 pm	Lunch
1:00 pm	Meet HR and finish paperwork
2:00 pm	Department head meet-and-greet
3:00 pm	Set up workspace
4:00 pm	Supervisor check-in
5:00 pm	Departure



The first week and beyond

You should schedule most of the first week for your new hires. Provide them with enough structure to help them adjust to their new work environment. Give them the opportunity to get to know the people with whom they will be working, and allow them time to ease into their own daily routine.

1 Cross-departmental meetings

Convene meetings with all collaborating departments. This will provide an opportunity to make introductions to key players.

2 Meetings with other stakeholders

Consider all stakeholders new hires should be aware. Provide a list of people they should meet, and help in setting—or set—a schedule. If face-to-face meetings are not possible, is there someone who can brief them on these stakeholders?

3 Time for check-ins and regular feedback

Ensure the success of a new hire by making weekly check-ins with a direct supervisor a priority. Regular check-ins build a relationship based on trust and transparency. This is also a way to keep track of the onboarding process and make changes as necessary—a best practice for ongoing development and performance management.

Topics to discuss

What can you expect from me?

What do I expect from you?

What worked well this week?

What could have been better?

How can I be helpful to you?

4 Short meetings

Coffee or short meetings with co-workers and stakeholders is an effective way for the new hire to get the lay of the land. Think about sending quick introduction emails to facilitate brief meetings with the right people.

5 Time to set expectations

Having clear expectations for the entire onboarding process will help new hires navigate it better. During the first week, work together to set clear expectations for the first 30/60/90 days.

6 Job shadowing

If an option, it is a great way for new hires to get an idea of what their days may look like. It also provides the opportunity to get to know one person on a deeper level. Think about having them shadow someone of a similar seniority level.

7 Meetings with the supervisor

Is it possible to take new hires to a meeting and have them observe? Watching their supervisor in action helps build a relationship based on trust and respect.

8 Time to observe a program/event

If there is a program or an event coming up, consider having new hires attend or give them a small role. Seeing the work of the organization in action will help them feel connected to the mission.

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9 Performance reviews

Performance reviews should be discussed at the beginning of the onboarding process to ensure full transparency. Although some surprises are fun, surprises related to performance reviews are not. Be open and upfront about the process, timing, and expectations.

10 Organizational calendar

Are there any projects, meetings, training, or events that are scheduled for the organization? Should new hires attend any of them? Will new hires be helping with any of them? Consider what may be helpful for new hires in their onboarding process.

11 Formal training in workplace safety

To demonstrate the importance of workplace safety, provide formal training around harassment policies and safety at work.

12 Something fun and energizing

Get creative! Everyone wants to love what they do, so help new hires feel energized and happy to work for your organization. Consider giving them the opportunity to experience the fun side of your work culture.

Sample first week schedule

Time	Monday
9:00–10:00 am	Arrival, view schedule and tour with buddy
10:00–10:15 am	See workspace
10:15 am–12:00 pm	Organizational overview
12:00–1:00 pm	Lunch with co-workers
1:00–2:00 pm	Meet with HR and finish paperwork
2:00–3:00 pm	Department head meet-and-greet
3:00–4:00 pm	Set up workspace
4:00–5:00 pm	Check-in with supervisor
Time	Tuesday
9:00–10:00 am	Arrive, settle in at desk
10:00 am–12:00 pm	Meet with supervisor (re: portfolio of work, responsibilities, supervision, & performance reviews)
12:00–1:00 pm	Lunch with co-workers
1:00–3:00 pm	At desk review progress thus far (re: project/program/event)
3:00–5:00 pm	Team bonding experience

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Sample first week schedule *(continued)*

Time	Wednesday
9:00–10:00 am	Arrive, settle in at desk
10:00–11:00 am	Coffee with co-workers
11:00 am–12:00 pm	Meeting with marketing team
12:00–1:00 pm	Lunch with co-workers
1:00–2:00 pm	Meet with HR and finish paperwork
2:00–3:00 pm	Department head meet-and-greet
3:00–4:00 pm	Set up workspace
4:00–5:00 pm	Check-in with supervisor
Time	Thursday
9:00–10:00 am	Arrive, settle in at desk
10:00 am–12:00 pm	At desk, work on project/program/event
12:00–1:00 pm	Lunch with co-workers
1:00–2:30 pm	Off-site meeting with organizational partners and supervisor
2:30–4:00 pm	Debrief at off-site office and prep for evening event
4:00–5:00 pm	Leave for event (venue) to observe
Time	Friday
9:00–10:00 am	Arrive, settle in at desk
10:00 am–12:00 pm	Meet with supervisor to set goals for 30/60/90 days
12:00–1:00 pm	Lunch with co-workers
1:00–5:00 pm	Open

Conversations to have after the first 90 days

End of probationary period

Many organizations have a three- to six-month probationary period. Most do not acknowledge its end or have a meaningful evaluation of the relationship at this point. The probationary period allows both parties to part ways if the relationship is not working. Consider having an end-of-probationary-period conversation to discuss what is working and what needs to change. Ask if the job is what was described/expected.

Training assessment and development needs

Investing in your staff strengthens the talent pipeline within your organization. Have a conversation about the skills your new hires may want to develop in the next six months.

Onboarding debrief

After 90 days, it makes sense to review the onboarding process. Provide the onboarding evaluation to help inform your onboarding process planning and structure. Every new hire provides you with the opportunity to improve the onboarding experience for the next new hire.

Job goal assessment

A good way to ensure that new hires are adjusting well to their role is to have recurring conversations about the status of ongoing projects, what has been accomplished, and what may need an adjustment, etc. Consider revisiting the previously established job goals to keep them relevant and flexible.

Safety at work

Continue the discussion with new employees about the importance of feeling safe at work, and reinforce the organization's commitment to creating a workplace that feels safe for everyone. Have there been any instances where they felt uncomfortable and may want to discuss with you? Do they know exactly what to do if an issue arises?

Remember

The key to developing an organizational culture where harassment is rare is to immediately establish with all new employees that safety is a top priority, and that unacceptable actions will be addressed immediately.



Set some goals for the first 90 days

Goal #1

What do you want to achieve?

What does success look like?

When do you want to achieve it? (mm/dd)

Review what was achieved

Goal #2

What do you want to achieve?

What does success look like?

When do you want to achieve it? (mm/dd)

Review what was achieved

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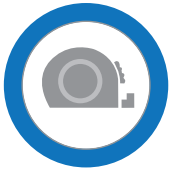
Personal development goal

What do you want to achieve?

What does success look like?

When do you want to achieve it? (mm/dd)

Review what was achieved



Evaluations

Sample onboarding evaluation

Evaluating the onboarding process is essential for continuous improvement. This will help us know what works and what needs to change so that the onboarding process will be even better for the next new hire.

Please provide this to your new team member 90 days after start date and instruct them to return to HR once completed.

How do you feel about your experience?						
For each of the following statements, answer on the scale of, Strongly Agree (SA), Agree (A), Neutral (N), Disagree (D), and Strongly Disagree (SD)						
SA	A	N	D	SD		
					Name:	Date:
					I felt eager to begin work	
					I felt welcomed at (Organization)	
					I work in a friendly and supportive environment	
					I feel engaged and productive in my work	
					I received essential information about (Organization's) culture, mission, vision, and values	
					I received information in a timely manner	
					I know what is expected of me by my supervisor.	
					I know what is expected of me by my co-workers	
					I understand my job responsibilities	
					I understand the purpose of my job	
					I understand how my job fits into the mission of (Organization)	
					I have the essential supplies, equipment, and support to do my job, or I know where to find them	
					I understand (Organization's) policies and procedures concerning performance evaluations	
					I understand (Organization's) policies concerning misconduct and grievances	

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How do you feel about your experience?

What were the most helpful activities or information covered during your first six months with (Organization)?

What activities or information do you feel were not helpful or not needed?

How can we improve the first 90 days for new hires?

What other comments do you have about your onboarding experience?

E G N F B

Rate your overall onboard experience.
Excellent (E), Good (G), Neutral (N), Fair (F), and Bad (B)



Best boss ever: Check-in questions

Questions to ask your new hire over coffee:

- How's it going? How do you feel in your new job?
- What are you enjoying most about your role?
- Is the job/team/company what you expected?
- Has anything surprised you? If so, what?
- Has training been helpful? What would you add or change?
- Do you have all the tools and resources that you need?
- Do you feel like you have gotten to know your coworkers well?
- Do you feel out of the loop about anything?
- What should we provide to new employees that we have missed?
- What is working/what is not working?
- Is anything about your role, the team or company still unclear?
- How can I be a better manager to you?
- As your manager, what can I do to make your transition easier?

First six months on the job

It is best practice to have a performance discussion prior to the end of the first year. Many of the suggestions below are also appropriate topics to discuss with employees who have been with your organization for longer than a year. Here are some topics to discuss.

- Did you meet your goals? How do you feel about the workload?
- What are appropriate goals for you in the coming year?
- What else do you need to be successful?
- How would you like to challenge yourself on the job in the next year?
- What skills would you like to develop further?
- What do you think you did well this year?
- What could you have done better?
- How can we improve the performance review process?
- What is the hardest part of this job for you? What is your least favorite part of the job?
- What is your favorite part of the job?
- Do I feel safe at work and do I help others feel safe at work?