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# **Supervisor Resource: Onboarding Toolkit**

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## INTRODUCTION

You never get a second chance to make a first impression, so take advantage of your new hire's onboarding as an opportunity to reinforce to them that they joined a remarkable institution. Set the groundwork for them to hit the ground running by ensuring they understand the job requirements, gain familiarity with key co-workers, have the tools they need to do their job, and feel welcomed and energized to join the Lee College Team!

### What is Onboarding?

Onboarding is the process of assimilating new employees into the workplace and providing the knowledge and tools for them to achieve success early on in their new jobs. It is the bridge between selection and productivity, encompassing activities from pre-arrival through the end of the first year.

### Benefits of Onboarding

- Fosters positive working relationships that help new employees gain confidence and become productive quickly.
- Improves overall engagement, performance, and retention through an understanding of and connection to the job, your department, and Lee College.
- Provides supervisors an opportunity to set goals and expectations, train and develop, and introduce new employees to the people and resources that will play a role in performing their jobs effectively and advancing their careers.

### Effective Onboarding

- Communicates the mission and vision of the College and your department.
- Facilitates understanding of job expectations and performance management.
- Helps new employees see how their roles fit into the larger organization and contribute to its success.
- Encourages teamwork and instills pride.
- Improves customer service.
- Reduces employee turnover.

## BEFORE THE FIRST DAY: PREPARING FOR YOUR NEW EMPLOYEE

How you set the stage for your new employee's first day is critical to creating a positive impression and building strong connections from the start.

### Communication

After HR notifies you that your employee accepted the job offer, something as simple as a two-minute phone call, a quick email, or a note in the mail can go a long way toward making your new employee feel valued and excited to begin working in your department. Ensure that the connection you build with your new employee is strong from the start.

- Stay in regular communication with your new employee via email or phone during the period between the acceptance and the start date.
- Provide critical first-day information:
  - When to arrive (date and time)
  - Where to park
  - Where to report
  - What to wear (e.g., uniform, lab attire, hard-toe shoes)
  - What documents to bring (if applicable)
  - What the work schedule will be
  - What the lunch options are
  - Information that is nice to know (e.g., there's coffee onsite, recycling is valued, the building is always cold)

## **Work Environment**

Make sure your new employee's work area is set up before the first day. First impressions count, so providing your new employee with a work area that is "move-in" ready matters. You may want to include a welcome packet of information about your department, the College, and the local area.

## **Location**

- Determine designated workspace(s) (e.g., office, cubicle, classrooms, labs, etc.).
- Organize and clean the designated area.
- Ensure appropriate furniture (e.g., chair, desk, file cabinet), supplies, and equipment are available.
- Request keys or other means of access to the designated space (e.g., building, lab, office).

## **Computer and Computing Access**

- HR submits the initial work order requesting IT create an email, network, and PeopleSoft access (if applicable) for your new hire.
- Ensure relevant computer access and accounts are set up (e.g., hardware, software applications, email, network connectivity, shared folders, Jantek).
- Add new employee's name and contact information to shared directories, distribution lists, and email/calendar systems.

## **Phone Services**

- Submit a work order to IT to set up telephone services (e.g., equipment, features, voicemail).
- If applicable, arrange for mobile devices (e.g., cell phone, radio).

## **Miscellaneous**

- Order business cards through Marketing & Public Affairs, if applicable.
- Ensure uniforms, personal protective equipment, etc. is available and ready to be assigned to the new employee.

## **Collaboration**

- Reach out to the rest of the department for help with preparations for your new employee's arrival. Involving peers builds camaraderie.
- Consider assigning a "buddy," an experienced co-worker who can assist in answering your new employee's questions and providing guidance in the early phases of the onboarding process.

## **Announcement**

- Announce the hiring of your new employee. Let everyone, including the management team, know when he/she is starting and in which position.
- Include information about your new employee's background (e.g., previous employment, education, experience, interests).
- Ask others to welcome and show support for your new employee.

## **Coordination**

- Prepare department orientation packet (e.g., vision, mission, organizational chart, staff directory).
- Arrange for introductions (e.g., walk about, welcoming event, designated time during an upcoming staff meeting).

## **Schedules**

- Plan and schedule any training critical for your new employee to receive within the first few weeks on the job.
- Identify key partners, leaders, and employees the new employee should meet early on and schedule meetings, if applicable.

- Set aside time on your calendar to make sure you are available when the new employee arrives on the first day and frequently throughout the first week.
- Develop an itinerary for the first week so your new employee hits the ground running with meaningful work. The schedule should include a balance of time with others and time alone to read introductory materials and complete orientation-related tasks. Include some or all of the following:
  - One-on-one or small group meetings with team members. During these meetings, team members might describe their work and how it integrates with the new employee's work.
  - One-on-one meetings with you to discuss position description, performance expectations, appropriate attire, work schedule, requesting time off, leave, etc.
  - Designated times for the new employee to complete mandatory compliance training and/or meet with HR to finalize benefit selections.
  - Meetings with other key colleagues.
  - Tour of campus or larger work environment.

## FIRST DAY: WELCOMING YOUR NEW EMPLOYEE

Set your new employee up for success from the start. Create a comfortable environment and have a plan to get your new employee involved, while remembering not to overwhelm him/her. At the end of the day, your new employee should know the basic operations of the department and leave feeling that he/she has joined the right team.

### Introductions

- Be there when your new employee arrives.
- Meet with your new employee. Discuss plans for the first day, the department's mission, vision and goals, and how your new employee's job supports them.
- Invite the department head to greet your new employee.
- Introduce your new employee to his/her "buddy" and other members of the department.
- Identify resources needed to help the employee be successful.
- Hold a small gathering or go out for lunch together.
- Make yourself as available as possible throughout the day.

### Work Environment

- Show your new employee his/her work area.
- Ensure your new employee has all necessary supplies and equipment.
- Allow employee time to set up his/her work area.
- Provide a tour of the work site.
- Point out storage areas for resource materials and supplies.
- Point out restrooms, common areas, and points of interest (e.g., vending machines, refrigerator, coffee service, break room, mailroom, printers, copiers).
- Explain building access and security measures.
- Discuss parking options.

### Administrative Matters

- Ensure new hire checklist items are completed. You can view assigned tasks and monitor the employee's completion progress in NEOED.
- Review the job description with the new hire to ensure a clear understanding of duties, responsibilities, and expectations.
- Discuss:
  - Hours of operation, work schedules, rest periods, workplace flexibility
  - Recording time worked (required for all hourly, non-exempt employees) and entering absences in Jantek
  - Absence from work policy and department procedures (e.g., running late, calling in sick, requesting time off, etc.)

- Define customer base and discuss expectations for customer service.

## FIRST WEEK: GETTING OFF TO A GOOD START

The rest of the week will build upon the foundation laid on the first day. It is important to remain available and approachable. Make sure two-way communication continues to be a priority. The following information is important to share with new employees during their first two weeks on the job.

### Building Connections

- Review department and division organizational charts. Discuss how they relate to the overall campus structure.
- Describe your department's work environment and culture (e.g., teams, working alone, supervising others).
- Review the schedule of upcoming events (e.g., academic calendar, administrative holidays, staff meetings, special events/standing activities, conferences/training dates).
- Set up a brief meeting at the end of the week to check-in and talk about the first week's activities.
- Provide contact information of team members, include phone #s and email addresses.
- Point out the employee online directory so he/she can connect with others on campus.
- Have them browse the [Lee College website](#) to learn more about what we do.
- Emphasize the importance of ongoing, open communication.

### Performing the Job

- Review operations and practices pertinent to the position/department (e.g., ordering equipment and supplies, confidential data management, signature authorities, etc.).
- Review job-specific policies, procedures, and compliance matters.
- If available, provide a desk manual/guide for standard operating procedures.
- Establish a plan and timeline for training.
  - All employees are required to complete the following training within their first 30 days of employment: Sexual Harassment, Child Abuse, Cyber Security, and Active Shooter.
  - Determine if additional training is needed to help the employee succeed in the new role.
  - Have the employee meet with other team members to observe and begin learning operations.
  - Managers can consult with the Empirical Educator's Center (EEC) for courses, programs, and resources.

### Work Environment

- Explain how to use office equipment (e.g., phones, printers, copy machines, fax, scanner, projectors, podium units, etc.).
- Show how to send and where to receive U.S. and campus mail.
- Review phone system and etiquette.
- Review safety-related plans (e.g., how to contact Security in the event of an emergency, how to sign up for the College's emergency alerts, evacuation procedures for office/building, location of nearest fire extinguisher, first aid kit, personal protective clothing/equipment, emergency exits, etc.).
- Describe the procedure for reporting a work-related injury or illness (i.e., Worker's Compensation).

### Computer Access

- Discuss computer security, as well as policies and procedures regarding acceptable use for electronic devices and communications (e.g., information security, confidentiality, privacy issues, FERPA).
- Ensure employee completes the mandatory, online cybersecurity training assigned to all new hires. Contact HR for assistance.
- Discuss email and internet protocol and expectations.
- If applicable, tour the department's website, intranet, and other websites important to the employee's position.

## FIRST MONTH: LEARNING THE ROUTINE

During the first month, have one-on-one check-ins at least weekly to clarify questions, address concerns and monitor progress. Your feedback can have a considerable impact on your new employee's self-perception and sense of achievement.

- Continue to clarify roles, responsibilities, and expectations, as needed, and provide ongoing coaching and feedback.
- Increase the complexity and scope of work to assess your new employee's ability to perform the full range of duties within the position.
- Ask for feedback about how things are going and if your new employee is getting the necessary support from you and others to become proficient.
- Ensure the employee completed the mandatory compliance training all new hires are required to complete within their first 30 days. Contact HR for assistance.
- Ensure the employee completed the benefits enrollment process within the first 30 days. Contact HR for assistance.
- Encourage new employee to check the campus online directory to ensure his/her name and contact information is correct.
- Encourage new employee to check first paycheck information to ensure it reflects benefit plan choices, payroll deductions, and personal information correctly.
- Model the kinds of behaviors you would like to instill in your new employees.

## FIRST SIX MONTHS: MASTERING THE ROLE

During the first six months, be clear and consistent about what is expected and how performance is measured so your new employee knows where to focus their efforts.

- Ensure that your new employee is gaining exposure to a variety of project types and learning opportunities.
- Identify strengths and determine what knowledge, skills, abilities, and assignments will complement or enhance them.
- Identify areas where employee needs to grow and improve to achieve competencies related to their job.
- Identify any other learning opportunities that may be appropriate for the employee.
- Hold monthly meetings to review performance expectations and goal achievement.
- Contact HR if there are any significant performance concerns.

## FIRST YEAR: ENCOURAGING EMPLOYMENT ENGAGEMENT

Once your new employee has settled into the position, onboarding shifts focus to their long-term success. At this stage, the process aims to engage your new employee in their own development and create excitement about achieving organizational goals. You can engage your employee by fostering meaningful work, promoting career development, and encouraging them to get involved in the greater campus community.

- Discuss development opportunities that will directly enhance job performance and fit into the strategic plan for the department.
- Create opportunities for your new employee to interact with a greater cross section of the campus community.
  - Encourage employee to explore the wide array of opportunities for involvement in the interests, initiatives, and activities of the greater campus community.
- Use creative methods to regularly recognize your employees for the work they do (e.g., celebrations, awards, College newsletter or social media).

## QUESTIONS/ASSISTANCE

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