

## Unit Orientation

This document is offered as a guideline for departments in planning the onboarding process for new hires. It is expected that managers will customize this document for the unique situation of their units.

### Preparing Your Unit: After Selection Decision/ Before Day One

After Selection Decision/ Before Day One			
Goals/Tasks	Resources/Specific Items/ Thoughts	Person Responsible	Done
Setup personnel file according to procedure			
Prepare paperwork for processing			
<a href="#">Register for New Employee Orientation</a>			
Schedule appointments for key introductions			
Schedule required training Plan for required online training	Look out 1 week, 1 month, 3 months, 6 months Sexual Harassment Training Driver training <a href="#">Safety Training Requirements</a> <a href="#">Safety Training Checklist</a>		
Coordinate departmental applications and services	Add employee to distribution lists (including e-mail) Network login and computer services Schedule e-mail setup on individual workstation		
Prepare equipment/technology	Order and organize personal protective equipment Order and organize tools Order and organize computer equipment Set up voicemail Ensure Oracle calendar and other UVM access is in place Order business cards Order long distance codes Order specific software needed for role		

After Selection Decision/ Before Day One			
Goals/Tasks	Resources/Specific Items/ Thoughts	Person Responsible	Done
Set up access for departmental accounts and services	Active directory S: drive folder access SharePoint PeopleSoft Combinations for combination locks Photo copier access code		
Communicate with employee regarding reporting time and place	Assign someone to greet employee at building/departmental entrance		
Create a meaningful list of 1 <sup>st</sup> work assignments	What meaningful and achievable items can be done in a relatively short amount of time?		
Prepare a welcoming environment	Send a memo to existing staff Schedule lunch with staff on first day Send memo to stakeholders with introduction and start date Remove all signs of previous employee Give employee choices for office supplies		

### Welcome: Day One

Welcome: Day One		
Goals/Tasks	Resources/Specific Items/ Thoughts	Person Responsible
Introductions	Office Staff Building Staff	
Make a positive first impression Create a sense of ownership; make the first day meaningful	What meaningful things can you do that will welcome the employee and create a positive first impression?	
Answer the employee's questions	Set aside a specified amount of time at the beginning of the day to dialogue with the employee	
Clarify Mission, Vision and Values of UVM and of individual team		

Welcome: Day One		
Goals/Tasks	Resources/Specific Items/ Thoughts	Person Responsible
Tour of the building	Bathrooms Vending machines Trash Office Supplies Refrigerator Fire exits Recycle bins Copier use/codes/location Fax use/codes/location	
Review emergency procedures and numbers	<a href="#">Police Services</a> Evacuation Plans	
Explain generally acceptable office standards	Confidentiality Teamwork Professional Behavior Communication Customer Service Explain office hours (8-4:30) and alternative work schedules Dress code Kitchen, break area/times, vending machines, <a href="#">on-campus dining</a> Explain <a href="#">payroll schedule</a> and timesheets (where used) Discuss first paycheck/direct deposit Explain how to report time/enter exception time in <a href="#">PeopleSoft</a> Explain notification when <a href="#">sick, on vacation, other eaves/absences</a>	
I-9 Form	Top portion required Bottom portion required by third day of employment <a href="#">I-9 Form Mini-Manual</a>	

## Introduction to the Job: Days 2-30

Introduction to the Job: Days 2-30		
Goals/Tasks	Resources/Specific Items/ Thoughts	Person Responsible
Answer employee's questions	Set aside specific time to answer any questions the employee may have	
Introductions	Campus Stakeholders Other introductions as necessary Could this be a task on the new employee's to-do list?	
Identify the key responsibilities of the new position and the impact on others Discuss expectations and support high performance standards	Review position description Collaboratively develop goals/objectives Agree how these objectives and goals will be met Discuss performance measures and the <a href="#">performance assessment process</a> Discuss the probationary period Schedule a 3-month formal check in Planning and goal-setting procedures	
Communicate overall goals and objectives of the team Communicate the strategic direction of the unit	Provide context for the new employee, their position and their goals	
Provide necessary resources to support the new employee	Campus tour Review departmental web site Review UVM <a href="#">website</a> Discuss accepted standards for: calendar, E-mail and telephone use Provide instruction for navigating network drives <a href="#">Print and Mail Center</a> services, explain campus mail delivery and overnight delivery services <a href="#">Work Order requests</a> and other <a href="#">Physical Plant</a> procedures	
Build team relationships	Explain meeting structures Explain unit communications Getting involved at UVM (committees, support groups, events, etc.), <a href="#">Staff Council</a> Schedule regular check-ins	
Professional Development Plan	Work with the employee to develop a specific and measurable professional development plan	

<b>Introduction to the Job: Days 2-30</b>		
<b>Goals/Tasks</b>	<b>Resources/Specific Items/ Thoughts</b>	<b>Person Responsible</b>
Begin required training	Per agreed upon plan	
Explain how to manage media, communications and public relations,	<a href="#">University Communications</a>	
<a href="#">University Policies, Procedures and Guidelines</a>	<a href="#">Travel policy</a> Budget procedures Budget procedures, numbers Specific Policies and Procedures	
Retention Interview	How do we compare to what we said we would be like? What is going well? Tell me what you like about working here. Which resources/employees have been helpful to you in your first 30/60/90 days?	

### **Settling Into the Job: Days 31-90**

<b>Settling Into the Job: Days 31-90</b>		
<b>Goals/Tasks</b>	<b>Resources/Specific Items/ Thoughts</b>	<b>Person Responsible</b>
Help establish productive working relationships between new employee and team		
Ensure how new employee understands how she/he contributes to the team		
Monitor performance, leverage strengths and set goals	Revisit Professional Development Plan Revisit original work plan	

## Developing Competence: Days 91-180

Developing Competence: Days 91-180		
Goals/Tasks	Resources/Specific Items/ Thoughts	Person Responsible
Monitor performance, leverage strengths and set goals		
Celebrate successes		
Continue to assist with building team and business relationships		
Determine if new employee would benefit from job enrichment and expanded responsibilities		

### Things to Remember

- Make them feel welcome
- **Small, bite-sized pieces**
- One-size does not fit all- the onboarding plan should follow a standard procedure, but must be tailored to the employee and the position
- This is an integrated process not a checklist
- Include checks and balances
- Measurable goals
- Create a clear line of sight to overall success of the University
- Inspire enthusiasm (don't be boring)
- "What they need, when they care about it"
- Decide what can be written down, standardized and completed ahead of time