

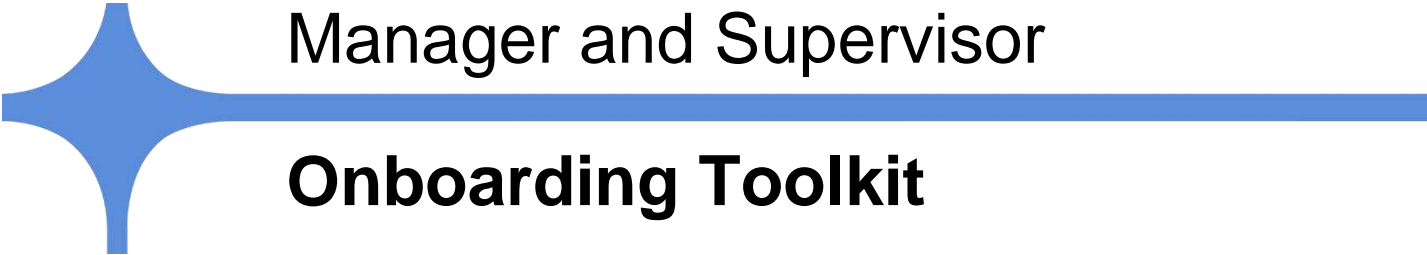


City of Portland

MANAGER & SUPERVISOR

# ONBOARDING TOOLKIT





# Manager and Supervisor

## Onboarding Toolkit

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# Welcome to the City of Portland Onboarding Program

This toolkit is designed to help you, as managers and supervisors, with the new hire process. You will find onboarding benefits, program details, and helpful tools to bring new employees up to speed quickly and effectively. Onboarding materials are available for new employees from the moment a job offer letter is signed through the first year of employment.

## What is Onboarding?

The term onboarding describes the process of orienting, engaging, training, and retaining an employee during the first year of employment. It is a process designed to welcome and educate new employees on work processes and procedures while informing them how work gets accomplished within the cultural context of the organization.

## What are the Benefits?

The onboarding program offers a standardized structure to simplify the new hire process and is designed to complement bureau-specific training for new hires. It will help get your new employees up-to-speed and performing successfully as quickly as possible.

Your New Hire Needs	Onboarding Program Deliverables
Streamlined new hire entry process	The <b>new hire checklist</b> and <b>interactive onboarding timeline</b> will help managers and supervisors submit all the necessary documents to the correct departments. A simplified process gives new hires access to city systems such as PortlandOregon.gov and SAP on the first day of employment.
Training on city rules, policies and procedures	<b>Web-based training on compliance requirements</b> provides an overview of HR 2.02* and covers essential topics including administrative rules and workplace behavior norms and expectations.  *Register for the required full course version of HR 2.02 on <a href="#">CityLearner</a> .

Training on City history, structure, culture and professional development opportunities	<b>Web-based training</b> on organizational culture and professional development opportunities will explain how work gets accomplished within the structural and cultural context of the city. It explains the city's history and government structure. Additional modules describe the benefits of working as a public sector employee, commitment to customer service, and on-going training opportunities. The <b>new employee onboarding webpage</b> will help employees become familiar with common citywide acronyms, contact lists, and other beneficial resources.
Assistance with specialized, bureau-specific onboarding training	BHR will provide <b>bureau-specific onboarding training templates</b> to compliment citywide onboarding training. Downloadable resources for will be hosted on the managers and supervisors onboarding webpage.
Increase new employee productivity	The <b>new employee onboarding webpage</b> will connect new hires to required forms to complete and submit before the first day of employment. As part of the <b>managers and supervisors onboarding webpage</b> , an <b>inventory of IT systems template</b> will help managers easily identify necessary drivers and networks for BTS forms. The combination of these two resources will enable new hires to access systems on the first day, increasing new employee productivity.
Increase employee retention rates	New employee orientation, training, and development keeps new hires engaged throughout the first year of employment. The <b>onboarding program</b> delivers information that employees need in order to perform their job and feel connected to the organization, greatly increasing retention rates.

# New Employee Onboarding Program

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## Description and Overview

### Purpose

The onboarding program provides a supportive and welcoming environment to new employees. A centralized onboarding system will enable the city to maximize its resources to hire and retain valuable employees. Citywide onboarding will:

1. Define and deliver the public sector employment experience to new City employees
2. Describe the culture of the organization as an employer
3. Build a positive and credible image of public sector work

### Outcomes

The onboarding program will establish and standardize the new hire process for all City of Portland employees. Onboarding information will educate, engage and integrate new personnel into city systems.

Primary outcomes of the onboarding program include:

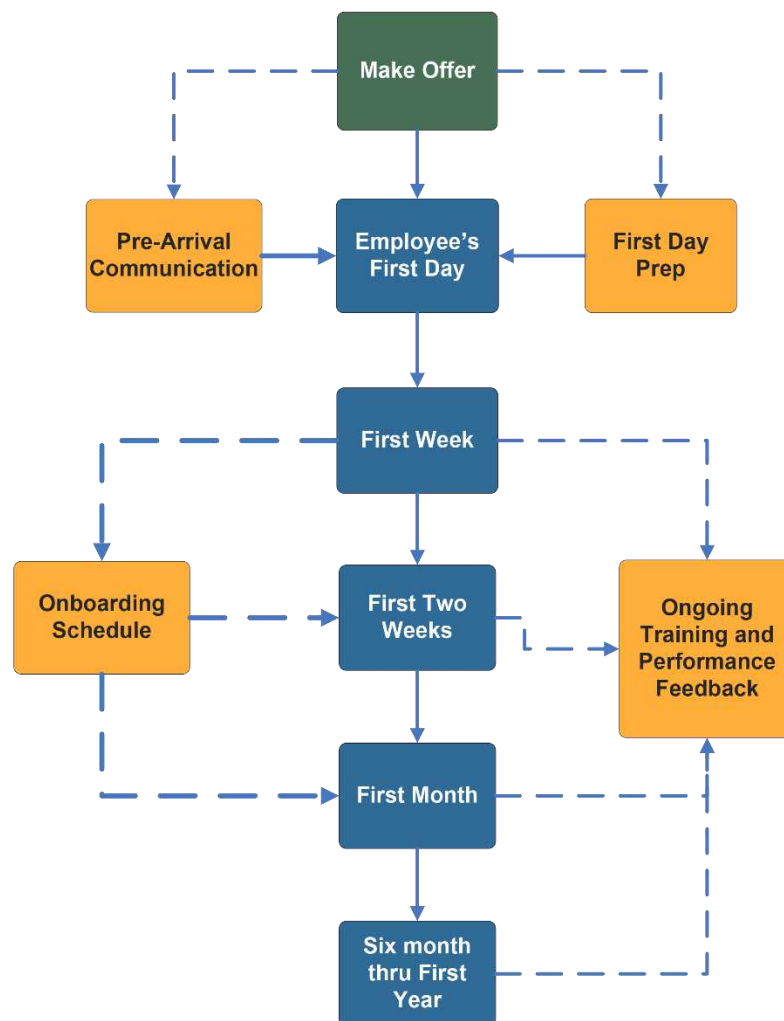
1. Attract top talent
2. Facilitate the new employee's ability to contribute in the new role
3. Increase the new employee's comfort level in the new role
4. Reinforce the employee's decision to join the City
5. Enhance productivity and reduce time to full performance levels
6. Encourage commitment and employee engagement
7. Improve retention of talent

# New Employee Onboarding Program

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## Onboarding Timeline

Managers and supervisors have access to an interactive onboarding timeline on the manager and supervisor onboarding webpage. Each box outlines processes and procedures during each step of the onboarding process. Visit [www.portlandoregon.gov/bhr/onboardingtoolkit](http://www.portlandoregon.gov/bhr/onboardingtoolkit) to utilize the interactive version of the timeline below.



# New Employee Onboarding Program

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## Your Role in the Onboarding Process

Managers and supervisors play a critical role in the onboarding process. Onboarding is a long-term process that begins before an employee's start date and continues until probation ends. Managers need to prepare and plan ahead to sustain successful onboarding progress. The following tools are designed to be used as a general onboarding guide. Your specific bureau may have additional orientation guidelines to supplement the citywide onboarding process.

## Manager and Supervisor Training

Training is provided for managers and supervisors, covering the scope, timeline, and components of the new employee onboarding program. It will also outline manager and supervisor responsibilities. After the training, managers will have the tools to successfully oversee the onboarding program for new employees.

## Manager and Supervisor Onboarding Webpage

To help simplify the process of bringing on a new employee, the Manager and Supervisor onboarding webpage delivers additional materials to help managers and supervisors welcome and train new employees. This resource page is a one-stop hub connecting managers and supervisors with all the information they need to successfully complete new hire paperwork, prepare the work environment, and provide ongoing support for new employees.

## New Employee Webpage

The New Hire webpage is intended to be shared once the offer letter is signed and before the employee's first day of employment. This webpage gives new hires access to all required forms to be completed and returned, along with access to general information about the City of Portland to acquaint them with the new work environment. The two onboarding webpages provide support for managers, supervisors, and employees as they work together to establish a smooth transition to the City of Portland.

To access the reference websites visit:

<b>Manager and Supervisors</b>	<a href="https://www.portlandoregon.gov/bhr/onboardingtoolkit/">https://www.portlandoregon.gov/bhr/onboardingtoolkit/</a>
<b>Employees</b>	<a href="https://www.portlandoregon.gov/bhr/newhire">https://www.portlandoregon.gov/bhr/newhire</a>

# 1

## New Employee Checklist for Hiring Manager/Supervisor Pre-Arrival List

This checklist is organized chronologically to help hiring managers prepare for the arrival of new employees.

Note: Incomplete or missing forms can result in a delay of the employee's computer access, initial paycheck, and benefits enrollment. Follow the checklist to prevent delays.

### Pre-Arrival Tasks for Hiring Managers

- ☐ Review, customize, and print out [New Employee Onboarding Checklist](#)
- ☐ Review related onboarding procedures in the Managers and Supervisors toolbox at: <https://www.portlandoregon.gov/bhr/onboardingtoolkit>
- ☐ Once the candidate has accepted the job offer, call or email him/her to answer any questions. Topics to cover:
  - Where and when to arrive on the first day
  - Transit options – public transit/parking
  - Lunch options
  - HR 4.03 Dress, Appearance & Fragrance
  - A point of contact in the event of a question or issue
  - Documents to complete and return before first day
  - Follow up email confirming pre-arrival information with link to new hire website link
- ☐ Provide follow up email with link to the New Hire webpage to print, complete, and return essential forms prior to first day. The link can be sent in the offer letter or via email. IMPORTANT: because the required forms contain sensitive and confidential information, the new hire should not return the completed forms by email (email is not a secure form of communication). The forms may be faxed, mailed, or hand-delivered to ensure security. Note that the I-9 employment eligibility form must be completed in person according to I-9 requirements. Consult your OBPA for information and support.
  - New Hire webpage: <https://www.portlandoregon.gov/bhr/newhire>
- ☐ Refer to checklist and gather information for the new employee on his/her first day including:
  - Complete job description
  - An organization chart of the bureau/office/department
  - Documents communicating the bureau/department's goals, priorities, and programs
  - A phone list for the bureau, as well as other essential contacts and phone numbers
- ☐ Create an onboarding schedule for the new employee.
  - See [Example Onboarding Schedule](#)
- ☐ Assign an onboarding peer for new employee's first couple months on the job.
  - See [Assigning an Onboarding Peer](#)
- ☐ If the employee has requested a work place accommodation, work with your [Human Resources Business Partner \(HRBP\)](#) to make arrangements before employee's first day.
  - To learn more about workplace accommodations see the [ADA Accommodations Guide](#) in this toolkit.
- ☐ Inspect the work area to ensure it is clean and has all supplies and materials needed.
  - See [Equipment and Supplies](#) checklist

# 2

## New Employee Checklist for Hiring Manager/Supervisor/OBPA First Day/First Week List

Employee Name: \_\_\_\_\_

Position Title: \_\_\_\_\_

Work Phone Number: \_\_\_\_\_

Department: \_\_\_\_\_

Work Email: \_\_\_\_\_

Supervisor: \_\_\_\_\_

### **Required Forms**

#### **To be completed by new employee:**

(Form links located on New Hire webpage)

- ☐ [W-4 Form](#)
- ☐ [I-9 Form](#) (within 3 days of start date; bring req. ID)
- ☐ [New Employee Information Form](#)
- ☐ [Protected Veterans, Gender, Race/Ethnicity Self-ID](#)
- ☐ [Self-Identification of Disability Status Form](#)
- ☐ [Direct Deposit Authorization Form](#)
- ☐ [Conviction/Criminal History Record Request\\*](#)
- ☐ [Wellness Forms\\*](#)
- ☐ [Password Self-Service Enrollment](#) (Excludes Police)
- ☐ [5-year driving record from DMV\\*](#) (if driving on City business, cost is \$3, fax to hiring manager)

#### **To be completed by manager/supervisor:**

(Have forms ready when employee returns completed forms above; review and complete all forms with new employee).

- ☐ [Offer letter signed](#)
- ☐ [I-9 form](#) (obtain from new employee, enter employer info)
- ☐ [Photo ID form/Security Badge](#) (Add security level 1-3)
- ☐ [Referral \(Certification\) form](#): (Obtain from HR Recruitment after completing requisition form)
- ☐ [Motor Vehicle Record Evaluation\\*](#) (if employee is driving on City business attach this form to DMV 5-year driving record and send to Risk Management)
- ☐ [Personnel Action Request from \(PAR\)\\*](#)
- ☐ [Vacation Accrual Authorization memo\\*](#)
- ☐ [OM position\\*](#)
- ☐ [Direct Deposit Opt Out Pay Statement\\*](#)
- ☐ Technologies Services Request form\*
  - o Use Cherwell Service Desk application

\*if needed

### **Supervisor/Manager Preparation Steps**

#### **Introduction**

- ☐ Email introduction to bureau
- ☐ Onboarding Schedule
  - ☐ Title, job description and reporting lines
  - ☐ Bureau mission, goals and strategic plan
  - ☐ Onboarding Peer introduction\*
  - ☐ Organizational Chart of bureau/office/department
  - ☐ Calendar; Office hours
  - ☐ Work and meeting schedules
  - ☐ Contact/phone list

#### **Work Setting**

- ☐ Office nameplate
- ☐ Building tour
- ☐ Emergency evacuation information
- ☐ ADA Workplace Accommodation\*

#### **Policies and Rules**

- ☐ Department policies
  - o Breaks/ Lunch
  - o Overtime
  - o Vacation/Sick leave
  - o Dress code
- ☐ HR 4.03 Dress, Appearance & Fragrance
- ☐ Media/Press rules
- ☐ City vehicle and travel policy\*

#### **Computer Systems**

- ☐ BTS Helpdesk contact information
- ☐ Phone, fax, copier, printer setup instructions
- ☐ Email signature instructions
- ☐ SAP training

#### **Job-Specific Training**

- ☐ On-the-job training
- ☐ Office supplies request form

## Example Onboarding Schedule I

1 <sup>st</sup> Day	Who Initiates
<input type="checkbox"/> Send an email greeting to the bureau/department to announce the new employee's arrival	Hiring Manager
<input type="checkbox"/> Complete remaining new hire paperwork and deliver to the Operating Bureau Personnel Administrator (OBPA) if not done prior to first day <ul style="list-style-type: none"> <li>See <a href="#">New Employee Checklist</a></li> </ul>	Hiring Manager
<input type="checkbox"/> Read and sign documentation for the <a href="#">HR Critical Rules</a>	Hiring Manager
<input type="checkbox"/> Read and sign confidentiality agreement	Hiring Manager
<input type="checkbox"/> Fill out security paperwork and add the appropriate security level (1-3). Go with employee to have photo ID badge made	Hiring Manager
<input type="checkbox"/> Staff introductions	Hiring Manager
<input type="checkbox"/> Give workplace tour (coat closet, restroom, water fountain, vending machine, pantry/kitchen, first aid kit, emergency exits)	Hiring Manager
<input type="checkbox"/> Introduce onboarding peer to help the new employee <ul style="list-style-type: none"> <li>See <a href="#">Assigning an Onboarding Peer</a></li> </ul>	Hiring Manager
<input type="checkbox"/> Provide computer orientation at desk (computer sign-in, shared network drives, Outlook/Collaboration tools, City website, ESS). Computer access may not yet be available if employee not previously entered into SAP	Onboarding Peer
<input type="checkbox"/> Employees needing access to SAP should contact Bureau of Technology Services (BTS) once logged in to obtain SAP password (if possible)	
<input type="checkbox"/> If applicable, provide ESS training for time entry and leave requests	Onboarding Peer
<input type="checkbox"/> Complete the new employee onboarding program in CityLearner	Employee
<input type="checkbox"/> Begin training	Onboarding Peer
<b><i>Schedule meeting to discuss/review:</i></b>	Hiring Manager
<input type="checkbox"/> Bureau/department goals and missions	Hiring Manager/ Onboarding Peer
<input type="checkbox"/> Bureau strategic plan, priorities, initiatives and programs	Hiring Manager/ Onboarding Peer
<input type="checkbox"/> Job description, discussing how the position fits into the work group and department	Hiring Manager
<input type="checkbox"/> Employee work schedule, absences, vacations, etc. and procedures for scheduling time off and unexpected absences	
<input type="checkbox"/> Go over phones, fax, copier, office supplies	Hiring Manager/ Onboarding Peer
<input type="checkbox"/> Debrief the first day, answer any questions, and explain the schedule for the next several days.	Hiring Manager

Within 1 <sup>st</sup> Week	Who Initiates
<input type="checkbox"/> Arrange tour of related City offices and buildings	Hiring Manager/ Onboarding Peer
<input type="checkbox"/> Review job responsibilities, competencies, and expectations	Hiring Manager
<input type="checkbox"/> Review bureau-specific information including: <ul style="list-style-type: none"> <li>Mission, vision, values and functions</li> <li>Organizational structure</li> <li>Policies and procedures</li> <li>Critical members of the bureau; staff directory</li> <li>Safety information</li> </ul>	Hiring Manager
<input type="checkbox"/> Meet with employee to review and schedule required trainings <ul style="list-style-type: none"> <li>List at: <a href="http://www.portlandoregon.gov/bhr/article/42092?">http://www.portlandoregon.gov/bhr/article/42092?</a></li> </ul>	Hiring Manager

<input type="checkbox"/> Complete Mandatory Reporting of Child Abuse training in CityLearner	Employee
<input type="checkbox"/> Explain the first assignment to the employee. o See <a href="#">A Successful First Assignment</a> template to use as a guide	Hiring Manager
<input type="checkbox"/> Share communication plan/preferences with the new employee. For example, explain types of situations to call verses email, how to schedule meetings o See <a href="#">Effective Communication</a> for guidance	Hiring Manger
<input type="checkbox"/> Provide any print or online resources employee could benefit from reviewing	Hiring Manager/ Onboarding Peer

<b>Within 2 Weeks</b>	<b>Who Initiates</b>
<input type="checkbox"/> Review performance feedback and appraisal processes	Hiring Manager
<input type="checkbox"/> Schedule weekly or bi-weekly 1-1 meetings to touch base with supervisor	Hiring Manager
<input type="checkbox"/> Overview of budget and finance procedures and policies (if applicable)	Hiring Manager

<b>Within 1<sup>st</sup> Month</b>	<b>Who Initiates</b>
<input type="checkbox"/> Complete online benefits enrollment: <a href="http://www.portlandoregon.gov/bhr/benefits">http://www.portlandoregon.gov/bhr/benefits</a>	Employee
<input type="checkbox"/> Complete HR 2.02 training	Employee
<input type="checkbox"/> Set up brief meetings with other department managers	Hiring Manager
<input type="checkbox"/> Draft Employee Professional Development Plan	Hiring Manager

<b>Within the First 3 Months</b>	<b>Who Initiates</b>
<input type="checkbox"/> Review and clarify performance objectives and expectations after the first month	Hiring Manager
<input type="checkbox"/> Quarterly feedback on performance objectives and check in on professional development plan	Hiring Manager

<b>At 6 Months and/or Probation End</b>	<b>Who Initiates</b>
<input type="checkbox"/> Quarterly feedback on performance objectives and check in on professional development plan	Hiring Manager
<input type="checkbox"/> Refine objectives for the coming year with employee	Hiring Manager

Once complete, this checklist should be signed by both the staff member and the manager. The original documents should be kept in the bureaus file.

Employee's Name (Please Print): \_\_\_\_\_

Job Title: \_\_\_\_\_

Hire Date: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Manager/Supervisor's Signature: \_\_\_\_\_

## Example Onboarding Schedule II

### Onboarding Schedule for Pat

**Monday, August 25**

8:30am-8:45am	<b>INTRODUCTIONS</b> <ul style="list-style-type: none"><li>• Send bureau wide introduction email</li><li>• Review first day schedule and New Employee Checklist</li></ul>
8:45am-9:45am	<b>ORIENTATION AND FORMS</b> <ul style="list-style-type: none"><li>• Complete all required forms in New Employee Checklist – if not done prior to first day</li><li>• Read and sign documentation for Critical Rules</li><li>• Read and sign confidentiality agreement</li></ul>
9:45am-10:15am	<b>TOUR OF OFFICE SPACE &amp; STAFF INTRODUCTIONS</b> <ul style="list-style-type: none"><li>• Complete and sign security form (add appropriate level 1-3) required to obtain photo ID badge</li><li>• Give a department tour (place to hang coat, washroom, water fountain, vending machine, pantry/kitchen, refrigerator, emergency exits.)</li><li>• Identify to workstation and provide floor plan (if possible)</li><li>• Introduce new staff to co-workers</li></ul>
10:15am-10:30am	<b>ASSIGN ONBOARDING PEER</b> <ul style="list-style-type: none"><li>• Introduce new employee to onboarding peer</li></ul>
10:30am-12:00pm	<b>COMPUTER ACCESS</b> <ul style="list-style-type: none"><li>• Provide computer orientation at desk (computer sign-in, shared network drives, Outlook/Collaboration tools, City website, ESS). Computer access may not yet be available if employee not previously entered into SAP</li><li>• Employees needing access to SAP should contact Bureau of Technology Services (BTS) once logged in to obtain SAP password (if possible)</li></ul>
12:00pm-1:00pm	<b>LUNCH WITH MANAGER AND ONBOARDING PEER</b>
1:00pm-2:30pm	<b>NEW EMPLOYEE ORIENTATION (Mandatory web-based course)</b> <ul style="list-style-type: none"><li>• Complete the City of Portland New Employee Orientation program in CityLearner</li><li>• Employee to register for course and take online (if accessible on first day)</li></ul>
2:30pm-3:30pm	<b>POSITION &amp; BUREAU OVERVIEW - MANAGER</b> <ul style="list-style-type: none"><li>• Discuss the bureau's mission and purpose</li><li>• Provide and review bureau's organizational chart explaining how the individual's position fits into and contributes to the bureau's mission.</li><li>• Discuss notification procedures (late, illness, vacation, and personal holidays).</li></ul>
3:30pm-4:45pm	<b>MEET WITH ONBOARDING PEER</b> <ul style="list-style-type: none"><li>• Go over phones, fax, copier, office supplies</li><li>• Review materials and department website</li><li>• Job training</li></ul>

- |                   |   |
|-------------------|---|
| 4:45pm-<br>5:00pm | DEBRIEF   |
|                   | <ul style="list-style-type: none"><li>• Meet with the employee to debrief the day, answer any questions, and explain the schedule for the next several days</li></ul> |

**Tuesday, August 26<sup>th</sup>**

- |                   |  |
|-------------------|--|
| 8:00am-<br>9:00am | OFFICE SETUP   |
|                   | <ul style="list-style-type: none"><li>• Employee to successfully logon to computer, email</li><li>• Time to arrange work space as needed</li></ul> |

- |                    |  |
|--------------------|--|
| 9:00am-<br>11:00am | MEET WITH MANAGER, DISCUSS SPECIFIC RESPONSIBILITIES   |
|                    | <ul style="list-style-type: none"><li>• Review position description and how it fits into the mission of the bureau</li><li>• Discuss position expectations</li><li>• Discuss performance expectations, set timeline for creating objectives and schedule quarterly discussions</li><li>• Explain communication style and preferences; See "<a href="#">Effective Communication</a>" for guidance</li></ul> |

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|---------------------|--|
| 11:00am-<br>12:00pm | FIRST ASSIGNMENT   |
|                     | <ul style="list-style-type: none"><li>• See "<a href="#">A Successful First Assignment</a>" attachment</li></ul> |

**Wednesday, August 27<sup>th</sup>**

- |                    |   |
|--------------------|---|
| 10:00am-<br>4:00pm | MEET W/ ONBOARDING PEER FOR ON THE JOB TRAINING   |
|                    | <ul style="list-style-type: none"><li>• Questions</li><li>• Training on any workgroup specific tools</li><li>• Job training</li></ul> |

**Thursday, August 28<sup>th</sup>**

- |                     |  |
|---------------------|--|
| 10:00am-<br>11:00am | MEET W/ BUREAU DIRECTOR  |
|                     | <ul style="list-style-type: none"><li>• Discuss the Bureau's history, vision and mission</li></ul> |

- |                   |  |
|-------------------|--|
| 1:00pm-<br>2:30pm | REVIEW WORK PROCESSES AND PROCEDURES   |
|                   | <ul style="list-style-type: none"><li>• City and bureau safety procedures</li><li>• Norms, standards, and expectations in the way work gets accomplished</li><li>• Identifying "go-to" personnel for key functions</li></ul> |

- |                   |   |
|-------------------|---|
| 2:30pm-<br>5:00pm | TRAINING  |
|                   | <ul style="list-style-type: none"><li>• Mandatory Reporting of Child Abuse</li><li>• Continue on the job training with onboarding peer if appropriate</li></ul> |

Once complete, this checklist should be signed by both the staff member and the manager. The original filed in the bureaus staff member's file.

Staff Member's Name (Please Print): \_\_\_\_\_

Job Title: \_\_\_\_\_

Hire Date: \_\_\_\_\_

Staff Member's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Manager's Signature: \_\_\_\_\_

# New Employee Onboarding Program

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## Email Announcement Template

To [new employee's work area/department]:

I'm very pleased to announce that [new employee] is joining [team name] as [job title] on [start date].  
[New employee] will be responsible for [insert information about what he/she will be doing].

[New employee] has recently [information about recent relevant employment background].

Please come to [location of employee's work space] to meet [new employee] and welcome [him/her] to our team!

You can reach [new employee] at:

- [work address/office location]
- [phone number]
- [email address]

Thank you,

[Name of Manager/Supervisor]

## New Employee Onboarding Program

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### Americans with Disabilities Act (ADA) Accommodation Request Guide

If the employee requests a workplace accommodation, consult with your [HR Business Partner](#) to make arrangements for the employee in advance of his/her arrival. The City provides training for managers and supervisors on ADA Workplace Accommodation Requests. This training can be booked in [CityLearner](#) and includes:

- Recognizing a request for accommodation
- Identifying essential job functions
- Evaluating and determining a reasonable accommodation
- Providing reasonable accommodation
- Communicating to the employee

For more information about the Americans with Disabilities Act refer to the Bureau of Human Resources website at: <https://www.portlandoregon.gov/bhr/33462>

# New Employee Onboarding Program

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## Equipment and Supplies

The necessary equipment and supplies should be available on the new employees first day. Whenever possible, requests for computer and phone equipment and services should be done prior to the new employee's first day.

### **Equipment, supplies and information include:**

- ☐ Business cards
- ☐ Name plaque
- ☐ Telephone, cell phone (as required)
- ☐ Phone directory of the department and other useful contacts
  - e.g. Human Resources, BTS Help Desk
- ☐ Voicemail codes and instructions
- ☐ Computer
- ☐ Printer (IP or network access if needed to configure)
- ☐ Photocopier (codes, maintenance, supplies)
- ☐ Fax machine
- ☐ General office supplies needed for job
- ☐ How to request equipment, repairs, and supplies
- ☐ Organizational charts

# New Employee Onboarding Program

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## Assigning an Onboarding Peer

### The Role of the Onboarding Peer

A new employee's introduction to the City is greatly enhanced by assigning an onboarding peer. A peer is not a substitute for a manager or supervisor, but a "go-to" person who can provide guidance and answer the new employee's questions about the work environment and the workplace culture in a positive and encouraging way. The onboarding peer can relate orientation information to actual situations while providing informal support on a peer-to-peer level.

### How to Structure an Onboarding Peer Assignment

The manager or supervisor should introduce the new employee to the onboarding peer, ideally on the first day at work. Peers should strive to meet face-to-face for a minimum of 30 minutes each week for the first month; however, support can go beyond the defined time period if useful and appropriate. Onboarding peers should be available to answer questions by email, phone, or in person within a reasonable amount of time.

### What Makes a Successful Onboarding Peer?

Managers and supervisors are responsible for identifying onboarding peer candidates and facilitating a match. Below is a list of other qualities to consider when looking for a peer:

- ☐ Holds a job similar to that of the new employee (i.e. peer)
- ☐ Possesses a full understanding of the work environment
- ☐ Has a good performance record
- ☐ Is well regarded by coworkers
- ☐ Has good communication and interpersonal skills
- ☐ Has patience and is empathetic
- ☐ Has a positive attitude
- ☐ Has schedule flexibility to be accessible to the new employee

### The Responsibilities of an Onboarding Peer

An onboarding peer should provide relevant information in a friendly and informal manner to help the new employee feel comfortable in his/her work environment. The onboarding peer should be a resource to the new employee on work rules, workplace culture and norms, and unwritten policies and procedures. Below is a list of suggested responsibilities of a partner:

- ☐ Help socialize the new employee with peers, joining them for lunch, etc.
- ☐ Identify useful resources specific to the work site
- ☐ Provide a tour of the workplace if the supervisor has not already done so
- ☐ Report any serious issues/concerns to the manager/supervisor
- ☐ Answer questions and refer the new employee to the appropriate resource
- ☐ Instill a sense of belonging to the City of Portland

# New Employee Onboarding Program

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## A Successful First Assignment

The first assignment is important for several reasons. It can give the employee a successful start in their new position. Securing an early win can boost morale and improve productivity. It can also help establish communication between the employee and supervisor.

### **Explain the expected outcome(s) of the assignment.**

- ☐ What will be the end result of the assignment? Will it be newly created or updated/changed?
- ☐ What will the outcome look like? (Provide examples, if possible.)
- ☐ How will success be measured?

### **Clarify the importance of the outcome(s).**

This will help the employee connect the assignment to the overall organization.

- ☐ Where do the results fit in the larger organizational picture? (Consider missions, goals and priorities). This will help the employee understand the impact the job has on the organization. Who will benefit from the results?

### **Describe the key features of the assignment.**

- ☐ What actions or steps are required?
- ☐ What resources or resource limitations may apply?
- ☐ What are the deadlines? Will there be milestones to meet prior to the final deadline?
- ☐ What is the priority of the assignment for the employee?
- ☐ How will progress be monitored?

### **Define the level of authority the employee will exercise throughout the assignment.**

- ☐ Should the employee carry out exact instructions?
- ☐ Should the employee bring recommendations to be decided on by the manager?
- ☐ What recommendations should the manager and new hire decide on together?
- ☐ Will the new employee have the authority to make decisions, but should inform management before acting?
- ☐ Will the new employee have the authority to make decisions, act, and then inform management of the outcome?

### **Let the employee know who else will be involved in the assignment.**

- ☐ Who can influence success?
- ☐ Who will the employee need to consult with? (Ensure that the employee knows how to contact this/these employee(s).)
- ☐ Who will the employee need to get resources from, if needed?

### **Identify potential issues and how they will be addressed.**

- ☐ What could possibly interrupt or stand in the way of success?

Remember to check with the employee throughout the discussion of the assignment to ensure that clear expectations are established and encourage questions. Clarify what management will do to support the employee's success. Following the completion of the first assignment the manager can discuss the outcome of the assignment, what challenges he/she faced, how his/her interaction with other employees went and what could have been done differently.

*Adapted from Stanford University. (2014). Assuring a Successful First Assignment.*

# New Employee Onboarding Program

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## Effective Communication

Effective communication helps establish an environment of trust and respect between managers and employees. Discussing each other's communication preferences early on can add clarity to formal and informal exchanges. Let the employee know your preferred means of communication. Today, with the many different work place arrangements, different methods of communication can be more effective (face-to-face, phone call, email, instant messenger).

- Do you generally prefer to talk in person or on the phone? Do you prefer to read information in order to understand, or do you have another preference?
- How does this preference influence how and when you choose to receive information?

### **Set the expectation for communication with the employee.**

- Will you be scheduling one-on-one meetings? How often will these meetings occur - weekly, monthly? Individual meetings can improve morale by helping a new employee realize he/she is heard and valued. Good morale generates a positive work environment. Use one-on-one sessions to inquire about the new employee's goals, skills and interests.
- Do you have an open door policy in your department? In many bureaus, all managers are expected to have an open door policy. This communication style works well when the supervisor is truly able to accommodate "drop in" interruptions and can give the employee his/her full attention.
- If the employee has an issue that he/she would like to discuss, how would you like to handle this?
- If a new employee has an idea for changing or improving something, how can he/she introduce the idea to you most effectively? Would you prefer an initial question, an emerging idea, or a well thought out plan?

### **Clarify any insider language used in the workplace.**

- Are there any commonly used acronyms and/or abbreviations the employee should be aware of?
- Refer the new employee to the City of Portland Acronym Dictionary on the new hire website.

**The goal is to create a safe environment where a new employee can express opinions (appropriately) and clarify issues and/or concerns. Discuss communication preferences and consider how you can work together most effectively.**

## Notes

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