**BEFORE THE EMPLOYEE’S START DATE**

Outcomes: *This is a welcoming work environment with informed colleagues and a fully equipped workspace; new employees feel “settled in” on their first day.*

**Schedule and Job Duties**

* Submit new hire paperwork
* Call employee:
  + Confirm start date, time, place, parking, dress code, etc.
  + Identify computer needs and requirements.
  + Provide name of their onboarding buddy.
  + Inform employee of lunch with buddy and/or co-workers and day chosen.
  + Inform employee of kitchen equipment for lunch/breaks.
  + Remind employee to bring IDs for I-9 form
  + Provide photo for badge.
* Add regularly scheduled meetings (e.g. staff and department) to employee’s calendar.
* Prepare employee’s calendar for the first two weeks.
* Plan the employee’s first assignment.

**Socialization**

* Email department/team of the new hire. Include start date, employee’s role, and bio. Copy the new employee, if appropriate. (See Tools & Resources)
* Set up meetings with critical people for the employee’s first few weeks.
* Arrange for lunch with the appropriate person(s) or buddy for the first day and during first week.
* Select the buddy. (See Buddy Guidelines)
* Meet with the buddy, and provide suggestions and tips on the new employees position. (See Buddy Guidelines)
* Arrange tour of agency.

**Work Environment**

* Put together welcome packet from the department and include: job description, welcome letter, organizational chart, contact names and phone lists, parking information, mission and values of the Institute, information on work team, etc.
* Clean the work area, and set up cube/office space with supplies.
* Order office or work area keys.
* Order business cards and name plate.
* Add employee to relevant email lists.

**Technology Access and Related**

* Order technology equipment (computer, printer, iPad) and software.
* Contact IT to have the system set up in advance.
* Set up email address.
* Arrange for access to common drives.
* Arrange for phone installation.

**Training/Development**

* Arrange pertinent trainings required for the job.

**FIRST DAY**

Outcomes: *The employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.*

**Schedule, Job Duties, and Expectations**

* Clarify the first week’s schedule, and confirm required and recommended training.
* Provide an overview of the functional area – its purpose, organizational structure, and goals.
* Review job description, outline of duties, and expectations.
* Describe how employee’s job fits in the agency, and how the job and their area contribute to the LHD/State.
* Review hours of work. Explain policies and procedures for overtime, use of vacation and sick time, holidays, etc. Explain any flexible work policies or procedures.
* Provide Regulations.

**Socialization**

* Be available to greet the employee on the first day, including Director and Supervisor.
* Introduce employee to others in the workplace.
* Introduce employee to his/her buddy.

**Work Environment**

* Give employee key(s) and building access card.
* Escort employee to HR.
* Remind employee to complete paperwork for new hires.
* Provide department or building-specific safety and emergency information.
* Take employee on tour of the building.
* Explain how to get additional supplies.

**Technology Access and Related**

* Provide information on setting up voicemail and computer.

**FIRST WEEK**

Outcomes: *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment.*

**Schedule, Job Duties, and Expectations**

* Give employee his/her initial assignment. (Make it something small and doable.)
* Debrief with employee after he/she attends initial meetings, attends training, and begins work on initial assignment. Also, touch base quickly each day.
* Provide additional contextual information about the department and organization to increase understanding of the purpose, value, goals, and initiatives.
* Explain the annual performance review and goal-setting process.
* Review the process related to the probationary period.

**Socialization**

* Arrange for a personal welcome from the Director.
* Arrange to eat lunch with the new employee.

**Technology Access and Related**

* Ensure employee has fully functioning computer and systems access and understands how to use them.

**FIRST MONTH**

Outcomes: *Employee is cognizant of his/her performance relative to the position and expectations; continues to develop, learn about the organization, and build relationships.*

**Schedule, Job Duties, and Expectations**

* Schedule and conduct regularly occurring one-on-one meetings.
* Continue to provide timely, on-going, meaningful “everyday feedback.”
* Elicit feedback from the employee and be available to answer questions.
* Explain the performance management process and compensation system.
* Discuss performance and professional development goals. Give employee an additional assignment.

**Socialization**

* Continue introducing employee to key people and bring him/her to relevant events.
* Meet with employee and buddy to review first weeks and answer questions.

**Training and Development**

* Ensure employee has attended Human Resources New Employee Orientation and turned in all necessary paperwork.
* Ensure employee is signed up for necessary training.

**FIRST THREE MONTHS**

Outcomes: *Employee is becoming fully aware of his/her role and responsibilities, beginning to work independently and produce meaningful work. He/she continues to feel acclimated to the environment, both functionally and socially.*

**Schedule, Job Duties, and Expectations**

* Continue having regularly occurring one-on-one meetings.
* Meet for informal three-month performance check-in.
* Continue giving employee assignments that are challenging yet doable.
* Create written performance goals and professional development goals.

**Socialization**

* Have employee “shadow” you at meetings to get exposure to others and learn more about the department and organization.
* Have a check-in with the employee and buddy.
* Take employee out to lunch, and have informal conversation about how things are going.

**Training and Development**

* Request the employee provide feedback on the training sessions and share as appropriate.
* Ask if needed training is completed.
* Provide information about continued learning opportunities.

**FIRST SIX MONTHS**

Outcomes: *Employee has gained momentum in producing deliverables, has begun to take the lead on some initiatives, and has built some relationships with peers as go-to partners. Employee feels confident and is engaged in new role while continuing to learn.*

**Schedule, Job Duties, and Expectations**

* Conduct six-month performance review.
* Review progress on performance goals and professional development goals.

**Socialization**

* Create an opportunity for employee to attend or be involved in an activity outside of his/her work area.
* Invite employee to LHD events and introduce him/her to others.
* Arrange for employee to meet with appropriate groups or with other new employees.
* Meet with employee and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the employee.

**FIRST YEAR [BETWEEN SIX AND TWELVE MONTHS]**

Outcomes: *Employee is fully engaged in new role – applies skills and knowledge, makes sound decisions, contributes to team goals, understands how his/her assignments affect others in the organization, and develops effective working relationships. He/she has a strong understanding of LHD’s mission and culture. Employee continues to be engaged in his/her role and has gained greater confidence in position; begins to take on additional assignments and works with some level of autonomy.*

**Schedule, Job Duties, and Expectations**

* Celebrate successes and recognition of employee’s contributions.
* Continue providing regular informal feedback; provide formal feedback during the annual review process.
* Have a conversation with employee about his/her experience at LHD to date:
  + Extent to which employee’s expectations of role and LHD align with reality.
  + Extent employee’s skills and knowledge are being utilized and ways to better utilize them; what is working, what they need more of, etc.
  + Begin discussing the year ahead.

**Socialization**

* Support and encourage employee participating on LHD projects, groups or cross training.
* Solicit employee’s feedback and suggestions on ways to improve the onboarding experience. Do this one-on-one or with a small group of new employees.

**Training and Development**

* Discuss employee’s professional development goals and identify relevant learning opportunities.