

Onboarding the Individual Contributor

A MANAGER'S CHECKLIST

Employee's Name _____ Job Title _____ Hire Date _____

PRE-ARRIVAL PHASE

Goal: Plan and prepare for the employee's arrival and ensure successful entrance into the organization.

- Check with your department's Human Resources Business Partner (HRBP) to determine the employee's start date.
- Select an Onboarding Buddy for the new hire, using the [Onboarding Buddy Guidelines](#).
- Meet with the Onboarding Buddy, and provide expectations, suggestions and tips.
- Call New Hire:
 - Confirm start date, time, place, parking, dress code, etc.
 - Identify computer needs and requirements.
 - Provide name of their Onboarding Buddy.
 - Remind employee to complete pre-hire tasks communicated by the HRBP/HRA team.
 - Find out when the employee is scheduled to attend New Employee Orientation (usually the first Monday after start date).
- Prepare a document communicating regularly scheduled meetings (e.g., staff and department) and email to New Hire prior to start date, maybe even placing the meetings on the new employees Outlook calendar.
- Prepare employee's onboarding calendar for the first two weeks.
- Determine the employee's first assignment.
- Email your department/team/functional area to announce new hire. Include start date, employee's role, and bio. Copy the new employee, if appropriate. [Email Template to Announce Your New Hire](#)
- Set up meetings with critical people for the employee's first few weeks.
- Obtain items with the HISD logo or brand to give on the first day as welcome gifts - a nice touch to say "we are glad you are a part of Team HISD".
- Schedule time for the new hire to complete mandatory training.

Assign the district's mandatory compliance courses to the employee through OneSourceMe. The following courses are required:

 - EEO Compliance, Sexual Harassment & Discrimination: "EEO"
 - Child Abuse Prevention: "Abuse"
 - Workplace Bullying: "Bullying"
 - Food Allergies: "Allergies"
- Arrange for a campus/building tour.
- Put together a welcome packet from the department and include: job descriptions, welcome letter, contact names and phone lists, building map, parking information, mission and values, information on the teams, etc.
- Clean the work area, and set up cube/space with supplies.
- Order business cards and produce name plate (Send an e-mail to buildingservices@houstonisd.org to request and arrange for a telephone or nameplate.)
- Order technology equipment and software.
- Arrange for phone installation and/or setup.

- Remind employee of the requirement to attend an in-person New Employee Orientation session the first Monday after their start date.
- Arrange pertinent trainings required for the job (Department/Team based)
- Fill out [Additional Building Access Form](#) (if necessary) for employees who need access beyond the "General Business Day" (Monday-Friday; 6 a.m. - 9 p.m.), Board Services, or the Superintendent's Suite. This option is only available to district employees who have offices, cubicles, or work stations located in the HMW ESC building. (This form must be completed before the new employee will be issued a HMW access badge).

FIRST DAY/FIRST WEEK

Goal: Ensure the new employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.

- Be available to greet the employee on the first day.
 - Introduce employee to others in the department.
 - Introduce employee to his/her Onboarding Buddy. [View the Onboarding Buddy Guidelines](#) [View the Onboarding Buddy Suggestions and Tips](#)
 - 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 the employee's job fits in to the department, and how the job and department contribute to the division and the district.
 - Review hours of work. Explain policies and procedures for overtime, use of vacation and leave, holidays, etc. Explain any specific workplace policies and procedures. For hourly employees, explain clock-in/clock-out procedures.
 - Take employee out to lunch.
 - Ensure that the employee received a building access card/district ID badge and the appropriate access level during New Employee Orientation.
 - Provide department or building-specific safety and emergency information.
 - Take employee on a building tour.
 - Explain the process for requesting additional supplies.
 - Provide information on setting up voicemail.
 - Debrief with employee after he/she attends initial meetings, attends training, and begins work on initial assignments. Also touch base each day.
 - Explain the annual performance review and goal-setting process.
 - Arrange for a personal welcome from the department leadership.
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FIRST 30 DAYS

Goal: Ensure that the new employee is cognizant of his/her performance relative to the position and expectations; continues to develop, learn about the organization, and build relationships.

- 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.
- Finalize the new employee's performance objectives and goals.
- Complete IPDP form within 15 business days of hire date.
- Conduct IPDP conversation with new employee, reviewing goals and expectations.
- Continue introducing employee to key people and bring him/her to relevant events.
- Meet with employee and Onboarding Buddy to review first weeks and answer questions.
- Ensure the employee has completed the HISD New Employee Orientation.
- Ensure the employee has completed all mandatory training.
 - EEO Compliance, Sexual Harassment & Discrimination: "EEO"
 - Child Abuse Prevention: "Abuse"
 - Workplace Bullying: "Bullying"
 - Food Allergies: "Allergies"

FIRST 90 DAYS

Goal: Cultivate the new employee by building competence in the job and providing frequent opportunities for open forum discussions. Employees should begin to have a full workload while managers monitor performance and provide early feedback.

- Continue having regularly occurring one-on-one meetings.
 - Meet for formal progress conference (Optional but recommended).
 - Have employee "shadow" you at meetings to get exposure to others and learn more about the department and organization.
 - Provide to employee information about professional development opportunities.
 - Arrange for employee to meet with appropriate division leadership either one-on-one or in a small group setting with other new employees.
 - Continue providing regular informal feedback.
 - Support and encourage employee participating on cross-functional teams.
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6 TO 9 MONTHS

Goal: Provide guidance and feedback to the employee to ensure continued success and to make plans for his/her future with the district.

- New employee should engage in a personality assessment process (e.g., [StrengthsFinder 2.0](#)) for developmental purposes and to identify areas in which the employee could contribute more to the team and/or department; follow up with coaching and/or an action plan if appropriate.
- Meet for formal progress conference (Optional but recommended).
- Employee should meet with Onboarding Buddy to reflect on his/her role.

1 YEAR

Goal: Monitor performance, individual development, goals and desires and to engage the employee in advancing the mission of the organization.

- Complete the annual performance appraisal end-of-year conference with the new employee.
- Meet with the employee to discuss a roadmap for long-term success.
- Provide an anniversary gift and card from the department leadership.