



# **Managers/Supervisors Guide for On Boarding New Employees**

---

# Contents

- Managers/Supervisors Guide for ..... 1
- On Boarding New Employees ..... 1
  - Message for Managers/supervisors ..... 3
  - What Is Onboarding? ..... 3
- Onboarding Roles and Responsibilities..... 5
- Before the First Day..... 6
- The First Day ..... 9
- The First Week ..... 11
- The First Month..... 12
- The Third Month ..... 13
- Six Months / End of Probation ..... 14

## MESSAGE FOR MANAGERS/SUPERVISORS

---

Congratulations on your new employee(s)!

This guide provides an overview of onboarding. It contains information, resources and tools which can be used as a starting point for successfully acculturating and developing new employees.

The County aims to be an “employer of choice” -- recruiting and retaining top talent. The organization strives to create a positive working experience where staff are informed and engaged and have strong working relationships with their manager/supervisor and colleagues. The foundation for this environment can be created through onboarding.

## WHAT IS ONBOARDING?

---

Onboarding is more than completing new hire paperwork or attending an orientation. Onboarding is collaborative, strategic approach that provides ***new employees with the needed information, tools and resources to effectively meet organizational goals.***

Onboarding aims to:

- ***Increase*** new employee ***productivity***, by training them about the County, Department and Division and their respective cultures.
- ***Improve retention rates*** of new employees within all employee groups by providing the wide array of information that employees need in order to feel engaged, successful, and connected.
- ***Provide audience-specific, in-depth, timely information*** over an extended period of time, so that information is useful and memorable for the new employee.
- ***Streamline processes*** and provide best practice information to enable managers/supervisors to deliver high-quality, consistent, and accurate information systematically to all new employees.
- ***Foster*** an environment of ***employee engagement***, where employees feel that the County of San Mateo is a great place to work.

*A successful onboarding program makes a positive impression on a new employee and creates a welcome feeling which confirms their decision to work for San Mateo County.*

## San Mateo County Onboarding Model

Below is the County of San Mateo’s model for onboarding new employees. Departments/ divisions may choose to expand on the model, adding more acute and relevant position/work-related information. The time periods may occur differently for you and your new employee, at your discretion.



### SAN MATEO COUNTY STRATEGIC ON BOARDING MODEL



#### PRINCIPLES

Align to Mission and Vision    Connect to culture, strategic goals and priorities    Integrate across owners    Apply to all employees

#### ROLES

+ Process Owners    +Process Champion    +Employee

#### PROCESS PHASES AND KEY ACTIVITIES

BEFORE FIRST DAY	FIRST DAY	FIRST WEEK	FIRST MONTH	6 MONTH-YEAR
<ul style="list-style-type: none"> <li>• Confirm position information verbally and in writing</li> <li>• Connect with employee to review logistics regarding First Day</li> <li>• Refer employee to New Employee Website for paperwork and employee information</li> <li>• Prepare for employee</li> </ul>	<ul style="list-style-type: none"> <li>• Welcome by Team</li> <li>• Incorporate senior leadership</li> <li>• Focus on sharing the mission and values</li> <li>• Meet immediate requirements for employment</li> <li>• Communicate resources or networks required for work</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure direct supervisor/ managerial involvement</li> <li>• Orient employee to organization and office norms</li> <li>• Assign meaningful work</li> <li>• Introduce employee to:               <ul style="list-style-type: none"> <li>• Buddy</li> <li>• Yammer</li> <li>• New Employee Welcome</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Monitor performance and provide regular feedback</li> <li>• Set performance expectations as well as Performance and Development Goals</li> <li>• Provide essential training</li> <li>• Seek professional and personal development opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Recognize positive employee contributions</li> <li>• Provide formal and informal feedback on performance</li> <li>• Set future performance and development goals</li> </ul>

#### OUTCOMES

High job satisfaction    Retention of high performers    Employee engagement and commitment    Efficiency and productivity

# Onboarding Roles and Responsibilities

---

## DEPARTMENT HEADS

---

- Set the strategic direction for the Department
- Share and live the organizational values

## MANAGERS/SUPERVISORS

---

- Create an engaging environment, coordinate with department staff to arrange work place
- Connect employees to colleagues
- Clarify your expectations up front, in writing
- Conduct regular “one-on-one” meetings
- Provide timely, information-specific, issue-focused coaching and feedback
- Set departmental, unit and job-related context and share technical job-related expertise
- Inform employees about organizational and departmental goals and culture

**33%**

*Of respondents in a 2014 HR Survey conducted by BambooHR said that managers/supervisors have the greatest influence on whether a new-hire onboarding is effective.*

## PERSONNEL/PAYROLL SPECIALIST

---

- Gather essential new hire paperwork (E.g. I-9, Tax Forms, Direct Deposit, Union Membership, etc.)
- Ensure required documentation is received and reflected in the appropriate system / file (E.g. Designation of Work Week, Pre-designation of Physician, Loyalty Oath, Non Social Security covered positions, etc.)

## HUMAN RESOURCES DEPARTMENT

---

- Inform about Benefit options and host Benefit Workshops
- Administer county-wide Human Resources applications (Workday and Learning Management System)
- Provide county-wide training
- Conduct New Employee Welcome (orientation)
- Distribute and analyze New Employee Survey, coordinate county-wide efforts to enhance the onboarding process
- Share organizational information and context

## INFORMATION SYSTEMS DEPARTMENT

---

- Upon request set-up county-wide information technology software / applications/ equipment (E.g. network access, email, etc.)
- Issue cardkey

## Before the First Day

---

Retention starts at recruitment. Hiring the right candidate is the first step in the onboarding process. The [Recruitment & Selection Guide for Hiring Managers](#) outlines the hiring process start to finish, and provides links and references for additional information.

When a candidate has been selected, the onboarding process starts. Once the candidate accepts the position, the manager/supervisor can begin planning for the new employees first day/week.

A great deal of the work necessary to successfully onboard a new employee is done before the employee's first day. Some of the suggested actions to "prepare" for a new employee are listed below.

### ***Prepare for the Employee's First Day/Week***

First impressions matter. It is important managers/supervisors adequately plan the essential activities for the new employees first day (and weeks) by coordinating and/or scheduling critical appointments and meetings (e.g. team members, Department Heads, Subject Matter Experts (SME), System Administrators, Department Payroll/Personnel Coordinators, committee and team meetings, etc.).

While in many instances the majority of on-the-job training and development will be provided by the employees' direct manager/supervisor, SME's can also be valuable resources in the onboarding experience. SME's can provide training on specialized, department, industry, or job-specific software applications, program and policies, as well as position and operational functions.

In addition to scheduling appointments and job-specific training, managers/supervisors should gather links to important websites, as well as resources manuals, handbooks and guides which may assist the new employee in understanding his/work and understanding essential information required to perform his/her job.

Managers/supervisors may also want to consider assigning a buddy (if applicable) to a new employee. The buddy can be a useful resource and partner for the manager/supervisor. The buddy can offer advice, guidance, knowledge and resources regarding the day-to-day aspects of working for San Mateo County and/or the new employee's immediate work environment. [For more information on the Buddy Program, click here.](#)

Although many pre-employment appointments should be completed prior to starting work, there are instances where crucial employment appointments may happen in the first few days of employment. Managers/supervisors should coordinate with the appropriate staff to ensure that the following critical pre-employment appointments are scheduled:

1. Fingerprinting – for background clearance
2. County Badge / ID
3. Physical (if applicable)

### ***Organize and Prepare the Workspace, Equipment, and Tools***

A clean and organized workspace, with properly functioning equipment, is an important element in ensuring the employee can be productive, efficient and effective as quickly as possible. Gathering basic office and/or desk supplies, collecting physical keys to cabinets, office, and/or building, as well as verifying a working phone, computer, and/or other equipment can create a smooth first day and make a good first impression.

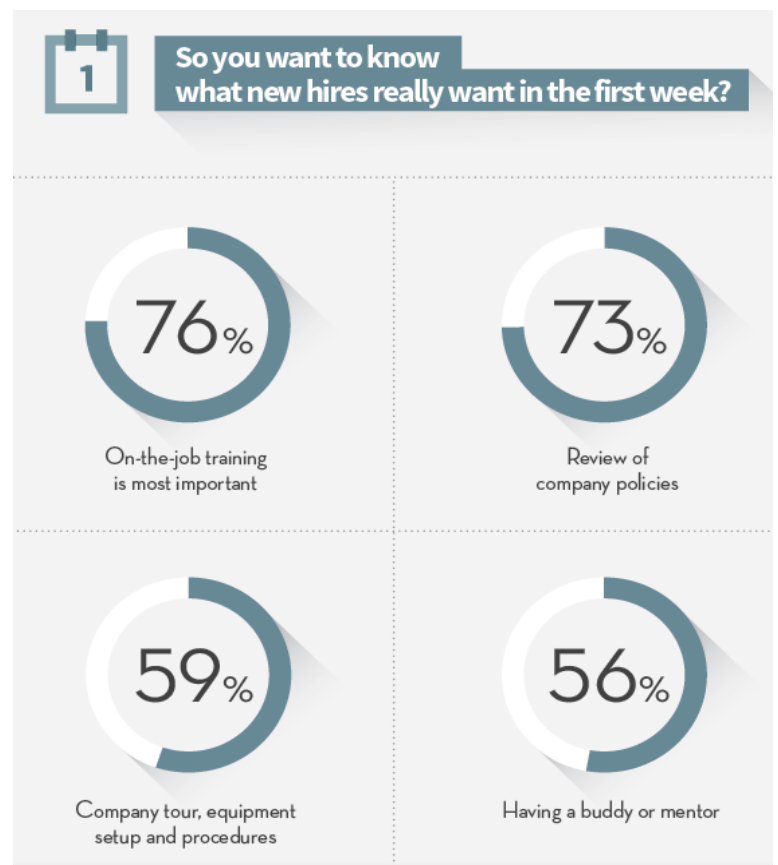
Equally important is ensuring the employee has access, including User ID's/account numbers, and temporary password information to voicemail, essential directories, systems, and applications. If the equipment is not available, or is need of replacement or repair, coordinate with the appropriate parties as quickly as possible.

### ***Put together Welcome Packet***

In order to organize you and the new employee, you may wish to put together a Welcome Packet. A Welcome Packet can contain useful information for the employee to review, and can serve as an organizing tool for the manager/supervisor about what fundamental material should be covered with/by a new employee. Suggestions on what can be included in a Welcome Packet are provided on the [Manager's New Employee Onboarding Checklist](#).

### ***Notify Others of the New Hire***

Because onboarding is a collaborative effort, it is important that the manager/supervisor contact departmental Personnel Staff to notify them of a new hire, and determine what information, if any, is needed. This is also an opportunity to discuss how and what they will be communicating to the new hire.



In addition, colleagues are more likely to assist in onboarding if they are informed of a new hire. Sending an email to colleagues and partners regarding a new hire not only lets them know who is starting and when, it also welcomes the new employee.

Some useful tips for drafting a new hire announcement to staff are:

**Be Upbeat** – share your excitement for the new hire

**Be Brief** – provide background, such as the employee’s name, position, start date, what their job/role and responsibilities will be, where the employee will be located (and contact information, if known), as well as a brief employee bio.

**Be Collaborative** – encourage colleagues to say hello and welcome the new employee to the team, and acclimate him/her to his/her role.

### ***Connect with the Employee before their first day***

Before the employee’s first day it is important to touch base to confirm first day details and answer any questions they may have. Some of the important information to convey is included in the [Onboarding Checklist](#).



# The First Day

---

The first day(s) and week(s) are opportunities for a new employee to connect with his/her supervisor/manager, members of his/her team, and/or his/her “buddy.” For most employees, the focus of the first day(s) and week(s) is primarily to introduce to the people, processes, and systems the employee will interact with, as well as the physical environment and organizational structure in which they will work.

Every supervisor and manager orients staff differently but all are encouraged to include the following elements in your first day(s) and week(s) on the job.

## ***Welcome them upon arrival, provide tour and an overview of what to expect***

One of the most crucial aspects of employee onboarding is welcoming them upon arrival. The first minutes of a new hire’s first day can set the tone for the entire day. It is essential to make sure someone (ideally the manager/supervisor) is there to greet the new-hire when they arrive, to acquaint them to the environment, review what to expect in the first day and week, and where to find resources and information.

While meeting with the employee on the first day, managers/supervisors have a comprehensive amount of information to share with an employee. Creating a Welcome Packet can ensure that the majority of the information is available, in printed form, for an employee to review during their first day and week on the job. Managers/ supervisors can also direct new employees to the [New Employee Website](#) for important and relevant information for new hires. (See Create a Welcome Packet for potential contents).

## ***Review Operations, Organizational Structure, Associated Goals, Programs and Services***

It is important that new employees understand the operations in their immediate environment, as well as the organizational structure of the County, Department, Division, and Unit/Team. It is also important that employees know the goals of each of these areas. Knowing the structure provides guidance on ‘the big picture’ by introducing how departments work together and towards a common purpose and identifies the people, positions and programs involved in achieving the mission, vision, and goals.

In addition, providing the employee with a list of current department projects and cyclical programs, and highlighting their role as well as the roles of other department members is another tool that will enable new employees to see ‘the big picture’. Associating the projects with workplans/timelines can also be helpful to enabling an employee to understand deliverables.

Onboarding is also about connecting new hires with Employee Work Life Benefits, Programs and Services; a few programs are listed below, additional programs and information are available on the [Benefits Website](#).

[Employee Wellness and Work Life Programs/Services](#)

[Deferred Compensation](#)

[Commute Alternatives Program](#)

[Tuition Reimbursement](#)

[Employee Benefits and Annual Benefits Fair](#)

[Worksite Ergonomics Consultation](#)

## ***Onboarding Tasks in Workday***

With the launch of Workday in 2015, some components of the new hire process will be automated. When new employees log into Workday for the first time they will be guided through onboarding workflow which include, reviewing and updating personal information, electing benefits, and reading and acknowledging policies. Managers/supervisors should ensure that new employees have completed their onboarding materials. As the manager/supervisor, you will be the point person to answer questions he/she may have and/or direct the employee to the appropriate party for clarification.

## ***Schedule Regular One-on-One Meetings, starting with day one***

At the end of the first day, and each day in the first week, schedule time to check in with the employee to inquire how their day went. Encourage the employee to ask questions, and allocate sufficient time to listen and address questions the employee may have. Managers/supervisors can also use this time to get to know the employee better (E.g. Explore work styles, and how the work style will complement each other and the work of the team.)

Regular meetings with employees should continue. The frequency of meetings will decrease as the employee becomes more accustomed to the environment and familiar with his/her role; however, managers/supervisors are encouraged to meet with their staff every two weeks.

# The First Week

---

During the first week on the job, the employee should be given information that will assist them in feeling comfortable with their responsibilities, the environment, team members and you, their manager/supervisor. Having the right information will make the employee feel equipped and able to make meaningful contributions as quickly as possible.

## ***Review first week schedule***

At the start of the first week, it is important that managers/supervisors review the schedule of appointments, including job-specific training. Managers/supervisors should discuss any timing and/or due dates associated with the training, and set aside time at the end of each day to check in with the employee.

The first week is a great time to have new hires complete required training. Managers/supervisors or the Department [Learning Management System](#) (LMS) Administrator can assign training courses through the LMS. For more information on required training for new employees in your department see your Department LMS Administrator.

A [Training Matrix](#) has been developed for employees hired or promoted into manager/supervisor positions. The Matrix outlines the training managers/supervisors can take within the first six months, year, and two years in their new role. The Matrix also includes suggested electives for ongoing training and development of managers/supervisors.

Checking in at the end of each day during the first week allows for the manager/supervisor to provide additional resources and information, as well as answer any questions a new employee might have about their work, environment, and/or expectations. It also allows the employee to keep the manager/supervisor aware of his/her progress.

## ***Ensure Employees have the Tools to be Successful***

During the employees first week manager/supervisors should verify that the new employee has the tools to be successful. Tools can be ensuring the employee is properly connected to the systems and equipment coordinated prior to his/her arrival, and that he/she has the information needed to perform work.

In addition, managers/supervisors should ensure the employee is able to use the email and voicemail system, able to access information on the various network drives, as well as internal and external websites, update their information in [Workday](#) (available 2015), and navigate the [Automated Time Keeping System](#) (ATKS), [Learning Management System](#) (LMS), and [Yammer](#).

# The First Month

---

During the first month employees begin to grow and develop their skill set and knowledge base and begin to assume a regular workload. This period is critical to forming employee perceptions about the organization and position. Managers/supervisors should use this period of time to establish the foundation for a solid working relationship.

## ***Ensure Onboarding Tasks in Workday are completed***

The New Hire Enrollment period begins approximately four days after an employee is hired. New employees have a limited time to elect their Benefits. The Benefits Division hosts bi-monthly Benefit Overview Sessions to assist employees in deciphering which Benefit option best meets their needs. Managers/supervisors should encourage new hires to attend a Benefit Orientation and/or review the Benefits Guide to ensure they select their Benefits within the required timeframe.

In addition, within the first week new employees should review and acknowledge the Countywide policies in Workday. Managers/supervisors should ensure that new employees complete these tasks and answer (or direct the new employee to the appropriate party) any questions the employee has regarding the policies.

## ***Hold Regular One-on-One Meetings***

Regular meetings provide dedicated time for manager/supervisor to discuss performance/goals, share informal and formal information, and provide value-added feedback and coaching. One-on-One meetings can also be an opportunity to discuss how the employee can continue to grow and develop by taking advantage of the County's Training and Development opportunities, such as instructor led and online training (available in the [Learning Management System](#)). Additionally, for those wishing to further their academic development the County offers a [Tuition Reimbursement Program](#).

Managers/supervisor can also promote opportunities for employees to participate in the County's Work Life Balance and Wellness Programs. A full list of Health and Wellness opportunities available to County employees is available on the [Health and Wellness page on the County internet site](#) and/or registration for training/events is done in the [Learning Management System](#) (Private Site).

## ***Discuss Performance Factors, as well as initial Performance and Development Goals***

During regularly scheduled one-on-one meetings, managers/supervisors should review Performance Factors and define the performance standards for all staff. The County has established a comprehensive yet flexible list of performance which reflects the skills and behaviors critical for success. For more information on [Performance Factors, click here](#).

Managers/supervisors should also set initial Performance and Development Goals for the first six months/probationary period with the new employee. Performance and Development goals are statements of the important results accomplished through work. Specific, measurable, achievable, realistic and timely ([SMART Goals](#)) create mutual understanding by clearly identifying what constitutes successful performance.

During the probationary period Performance and Development Goals may focus on learning new skills required to effectively perform work, learning software systems and applications, understanding operations and gaining technical information.

For more information on [Performance and Development Goals, click here](#).

### ***Check in on the Onboarding Experience***

Once an employee has been working for a while (usually one to three months), it is a good idea to check-in on his/her onboarding experience. The County will send the New Employee Onboarding Survey to every new employee after he/she has been employed for one month (and again at six months). However, the manager/supervisors should also connect with the new employee to understand his/her onboarding experience.

Questions managers/supervisors may want to explore can include:

- Do you feel prepared for and able to do your job? If not, why? What do you need to feel more prepared?
- Do you have all the tools you need to do your job?
- How has the “buddy” worked for you? (if applicable)
- Is there anything else I can assist you with?

## **The Third Month**

---

Along with ongoing feedback, new employees should receive a written performance evaluation every three months, until the end of their probationary period. The three-month evaluation should acknowledge an employee’s growth and development, as well as indicate areas for additional focus in the coming months.

New employees will be invited to attend a New Employee Welcome (NEW) program. The Department Payroll Clerk will notify the manager/supervisor and the new employee of the scheduled date for this event. The NEW is a half-day networking mixer, and an opportunity for new employees to meet other new employees and County leaders.

## Six Months / Year / End of Probation

---

**Congratulations!** You and your employee have hit the six-month mark in your employment. The first six months of employment are crucial to an employee's retention with an organization. Take time to breathe deep, recognize the accomplishment, reflect on the successes and contributions of the employee, and get ready for the time ahead!

After the first six months, initial excitement about being part of a new organization may wane. Managers/supervisors need to continue to develop staff to ensure they are connected and committed, that their opinions matter, and their contributions are being appreciated and recognized.

### ***End of Probation Evaluation***

In addition to providing regular coaching and feedback, and providing a written evaluation every three months, managers/supervisors should conduct a Probationary Evaluation at the end of probationary period. This is an opportunity for the manager/supervisor and the new employee to take time to assess what he/she has done well during the probationary period, and what can be improved upon. The Probationary Evaluation also identifies opportunities to contribute the employee's future success.

Regular evaluations should continue for all employees on an annual basis. Annual evaluations allow for collaborative discussions between an employee and his/her supervisor /manager to provide coaching and feedback; reflect on previous performance; set future performance and development goals; establish clear expectations; and, acknowledge contributions and address areas for growth.

As part of the evaluation process, the manager/supervisor may wish to encourage your employees to complete an [Employee Self Review](#). The Employee Self Review provides an opportunity for the employee to consider their:

- Success on achieving Performance and Development Goals
- Ability to meet expectations and how you can continue to be fully productive, or possibly increase your effectiveness or job satisfaction
- Work responsibilities which you are most excited about, and/or where you want to develop and how you might do that, including what support and/or resources you might need to do so.
- Suggestions for operations, as well as efficiencies and effectiveness in operations and within the organization



Effective onboarding  
*increases performance by*  
up to **11.3%**

[TTI Success Insights \(2015\)](#)

### ***Set Performance and Development Goals***

After completing the Probationary Evaluation, managers/supervisors should establish specific, measurable, achievable, realistic and timely ([SMART Goals](#)) Performance and Development goals for the next review period. Where the goals for the first six months of employment may have focused on learning and new skills, the goals for the next review period may focus on the putting the new skills and information to work. For more information on [Performance Planning, click here.](#)

### ***Check in on the Onboarding Experience – Six Months***

Once an employee has been with the organization for six months, he/she should have a good idea of the organization as well as his/her role and responsibilities. They County will be sending the New Employee Onboarding Survey for a second time after an employee has been employed for six months.

The six-month marks also serves as an opportunity for managers/supervisors to learn more about how the new employee feels he/she is doing, understanding the employee's onboarding experience, including what went well and what could be improved.