Onboarding Coordinator
Overview

This model applies to any employee who is new to the university or new to the unit/department.

What is onboarding?

Onboarding is integrating and acculturating new employees into the university and providing them with the tools, resources, and knowledge to become successful and productive. The onboarding process starts with the accepted offer and continues through the end of the first year.

What are the goals of onboarding?

- Accommodating: Getting the new employee the tools, and resources to be successful
- Acculturating: Helping the employee understand and navigate the culture of the organization
- Accelerating: Minimizing the time before new employees are productive members of their workgroup by arranging appropriate training and networking

What is your role?

The **Onboarding Coordinator** oversees the entire onboarding program and is responsible for coordinating the tasks within the process. He/she is the primary contact for the program and accountable for review, enhancement and maintenance. The coordinator also tracks progress of the onboarding process and ensures each new hire has an opportunity to provide feedback about their onboarding experience.

Sample Check List

Overview: The coordinator will complement the work of the peer partner and supervisor by planning, scheduling, managing, and tracking associated administrative tasks.

Pre-Boarding

Create a welcoming, smooth and error-free entry to the UW-Madison and your unit/department work environment.

Accommodate		
Task	**Assigned to:**	**Complete** ✓
1. Provide supervisor with check list.		
2. Contact new hire and introduce yourself and your role in the onboarding process.		
3. Contact new hire and: • Coordinate relocation and travel • Set up Net ID (and any other required logons) and communicate activation instructions • Inquire about daily transportation preference and explain bus pass/parking information • Send instructions for parking pass • Follow up to ensure that parking is arranged • Inquire about computer preferences (e.g. desktop or laptop, specific software needs, remote access needs) • Inquire about letterhead and business card preferences.		
6. Prepare office access and equipment • Obtain computer and set up • Printer/printer access • Email address • Phone line/number • Office/building keys or access		
7. Prepare office space and supplies • Clean • Provision with basic supplies • Order stationery/business cards		
8. Coordinate first-day schedule: • Reporting location • Parking arrangements • Arrival time • Meetings and introductions (include peer partner) • Lunch arrangements		

	Assigned to:	Complete ✓
9. Compile and email/mail information to new hire. The information packet should arrive at least one week before start date. Packet should contain: • Welcome letter from the supervisor and human resources. • Detailed schedule of first day. • New email address and phone number • Employee benefits information • Position description • College/unit information. • Overview of the onboarding plan. • Schedule for first week.		
10. Connect with benefits/payroll to schedule whatever meetings are needed or initiate paperwork to complete in advance of first day.		

Acculturate		
Task	**Assigned to:**	**Complete ✓**
1. Collaborate with supervisor to select appropriate peer partner.		
2. Provide and review guidelines with peer partner.		
3. Facilitate connection between peer partner and new hire.		
4. Announce the new hire and his/her arrival to faculty and staff in the college/unit (e.g. bio/background, arrival date)		
5. Review dates of upcoming central New Employee Orientation (NEO) and block time for attendance.		
6. Review and plan for attendance at any upcoming campus-wide events (e.g. diversity forum, benefits and resource fair, etc.)		
7. Contact new hire to express excitement over their arrival and offer support.		
8. Create/update an overview of the college/unit (e.g. history, vision, mission, values and strategic plan; annual reports; metrics and performance results; leadership structure and organizational chart; web site)		

Accelerate		
Task	**Assigned to:**	**Complete ✓**
1. Schedule meetings with new hire's colleagues.		
2. If new hire is a supervisor, schedule meeting within first week with direct reports.		
3. Facilitate access to applicable campus IT systems		
4. Review PD/PVL and plan communication of expectations.		
5. Create training plan.		
6. Coordinate first-week schedule: • Meeting(s) with peer partner • Other meetings and/or trainings		

Day 1

Welcome, orient, and begin connecting the new hire to the culture and people at UW-Madison. Coordinator and the peer partner help orient the new hire to the department, college/unit, and UW-Madison.

Accommodate		
Task	**Assigned to:**	**Complete ✓**
1. Provide keys for office, building, etc.		
2. Tour office (introductions as needed) • Focus on basic needs (restroom, lunch/break room, etc.)		
3. Provide overview of onboarding plan		
4. Review Day 1 schedule and Week 1 schedule		
5. Acquire Campus ID • Bus pass		
Acculturate		
Task	**Assigned to:**	**Complete ✓**
1. Welcome the new hire (lobby or office)		
2. Provide brief introductions to key staff		
3. Introduce to peer partner		
Accelerate		
Task	**Assigned to:**	**Complete ✓**
1. Supervisor/New Hire meeting		
2. Workspace overview • Telephone/voicemail setup (provide written instructions including voicemail retrieval instructions) • Computer logon and email setup (provide remote access instructions) • Review business cards • Describe procedures for calendaring within unit (and those he/she will be working closely with)		

Days 2-5 (first week)

Help acclimate the new hire and troubleshoot any problems.

Accommodate		
Task	**Assigned to:**	**Complete ✓**
1. Provide overview of office supplies/equipment (e.g. copy/fax/printers, supplies, mailing procedures)		
2. Provide unit staff directory		
3. Explain building emergency/safety procedures		
4. Explain time, attendance and payroll documentation • Payroll calendar • Holiday and personal leave • Timesheet requirements		
5. Register for Benefits 101		
6. Provide overview of campus bus system/schedule		
Acculturate		
Task	**Assigned to:**	**Complete ✓**
1. Review vision, mission, goals of unit		
2. Register for campus New Employee Orientation		
3. Introductions to colleagues, partner departments, etc.		
4. Expanded tour of building (or key campus facilities)		
5. Team introduction/welcome "event" (e.g. breakfast, lunch, etc.)		
6. Activities with peer partner (e.g. tour of building, neighborhood, area lunch options, etc.)		
Accelerate		
Task	**Assigned to:**	**Complete ✓**
1. Provide overview of any standing meetings		
2. Register for any job-specific training or informational events		
3. Review job expectations and training plan		
4. Review communication expectations		

Weeks 2-4 (first month)
Help to connect with the campus community.

Accommodate		
Task	Assigned to:	Complete ✓
1. Review of campus employee policies		
2. Frequent check-ins regarding administrative items (e.g. supplies and equipment)		
Acculturate		
Task	Assigned to:	Complete ✓
1. Peer Partner activities (e.g. visit campus amenities like Recreational Services facilities, Memorial Union and Union South, etc.)		
2. Attend campus-wide events		
Accelerate		
Task	Assigned to:	Complete ✓
1. Review campus resources and where to find information		
2. Review training plan and add relevant learning events		
3. Performance management cycle		

Within first 6 months
Continue connecting with peer partner and complete onboarding evaluation.

Accommodate		
Task	Assigned to:	Complete ✓
1. Collect Onboarding evaluation from new hire		
2. Continue check-ins regarding administrative items (e.g. parking renewal, purchases, travel, etc.)		
Acculturate		
Task	Assigned to:	Complete ✓
1. Peer partner activities (campus events, team activities)		
2. Comprehensive campus tour		
Accelerate		
Task	Assigned to:	Complete ✓
1. Mid-point performance management discussion		
2. Create development plan		

End of 1ˢᵗ year
Evaluate the onboarding experience.

Accommodate		
Task	Assigned to:	Complete ✓
1. Collect comprehensive Onboarding evaluation from new hire		
Acculturate		
Task	Assigned to:	Complete ✓
1. Celebration of Happy Hire Date		
Accelerate		
Task	Assigned to:	Complete ✓
1. Annual performance management conversation		