Onboarding Basics

Understanding the UW–Madison
New Employee Onboarding Policy

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Onboarding Basics

ONBOARDING BASICS

The University of Wisconsin–Madison is committed to supporting new employees in their successful transition to our workplace, as well as supporting the university's need to quickly enable new employees to achieve high levels of proficiency. In part, successfully transitioning requires an onboarding program that engages each new employee beginning with the acceptance of the University job offer, and continuing through the entire first year of employment.

Documented onboarding programs that reflect common definitions, timing, activities, and roles – along with consistent execution and evaluation – will enhance employee engagement and job satisfaction, and shorten the time from hire to full productivity.

PURPOSE

This guide will introduce you to Onboarding and provide the foundation, explanation and support to enable you to initiate or refine an onboarding program within your unit.

LEARNING OBJECTIVES

Upon review of this guide, you will:

- Be able to define Onboarding
- Understand the goals, outcomes and roles involved in Onboarding
- Understand the details and responsibilities of the New Employee Onboarding Policy
- Learn about onboarding program stages and activities
- Review available onboarding tools and resources

WHAT IS ONBOARDING?

Research has clearly shown that a well-designed and -executed onboarding program will reinforce a new employee's job choice. Onboarding enhances job satisfaction/engagement and shortens the time from hire to full productivity by ensuring that new employees receive the support, tools and resources they need, including a welcoming environment and clear expectations from their supervisors. When a new employee experiences a positive onboarding experience, his or her commitment to both the new role and the university is strengthened.

> Onboarding is integrating and acculturating new employees into the organization and providing them with the tools, resources, and knowledge to become successful and productive.

Notes:

WHAT ARE THE GOALS OF ONBOARDING?

- Accommodating: Getting the new employee the tools, resources, and training 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

WHAT ARE THE OUTCOMES?

- Job satisfaction
- Employee retention
- Engagement and commitment
- Faster time-to-productivity

ORIENTATION V. ONBOARDING

Onboarding is a long-term support system that integrates new employees into the organization using a comprehensive plan.

Orientation	Onboarding
During week 1	Throughout year 1
Familiarize with organization's structure, mission, and policies	Actively involve in activities to align with organization culture, goals, and mission
Employee attends presentations	Employee is actively engaged/mentored
Often performed primarily by HR	Involves multiple people and departments, including managers

WHAT ARE THE PRIMARY ROLES IN ONBOARDING?

Typical roles in the onboarding process are outlined below. Roles are sometimes overlapped or combined and responsibilities are often delegated to fit the needs of a particular division/department/unit.

Role	Responsibilities
Onboarding Coordinator	- Oversees entire onboarding process - Coordinates tasks within the onboarding process - Ensures immediate administrative needs of the new hire are met - Coordinates meetings and scheduling – serves as the point person for new hire - Tracks progress of the onboarding process - Ensures new hire has an opportunity to provide feedback on the onboarding experience
Supervisor/Manager	- Welcomes new hire - Peer partner assignment - Communicating job expectations - Meaningful work assignment - Training/development plan - Communicating department vision/mission/culture - Availability/frequent check-ins - Timely performance feedback
Peer Partner	- Welcomes new hire - Provides introductions - Checks-in frequently - Assists new hire with navigating the culture of the organization - Serves as a resource or connects new hire with resources to answer specific questions

Notes:

THE ONBOARDING POLICY

The Office of Human Resources supports campus onboarding efforts through a variety of means, including

Find the policy here:
https://kb.wisc.edu/ohr/policies/page.php?id=49579

through the onboarding policy and associated tools. The policy and associated tools are intended to guide campus in ensuring new employees receive a comprehensive onboarding experience that reinforces their choice to work at UW–Madison and supports them in performing the functions of their job at a high level.

THREE CONTENT AREAS OF THE POLICY

- Policy Basics
- Policy Detail
- Supporting Information

Policy Basics

The Policy Basics content area summarizes the policy, gives the rationale for having a policy and most importantly explains who the policy applies to and who has responsibility for ensuring implementation.

The policy applies to full- or part-time Academic and University Staff employees with a defined or anticipated appointment greater than one year; and Limited Appointees.

It is the expectation that all campus colleges/schools/divisions fulfill the requirements of the policy. It is the responsibility of the dean's or director's office to ensure policy implementation and compliance.

Policy Detail

The Policy Detail content area outlines the expectations for five areas.

1. Program development
    - Each college/school/division is required to develop, implement, monitor and maintain a documented onboarding program.
    - Colleges/schools/divisions are **allowed the flexibility** to delegate program creation to departments/units.
    - Appropriate personnel must review the policy and this documentation.

2. Program minimum requirements
    - Programs should span first year of employment.
    - Program will detail activities, when they occur, to whom they apply, and who is responsible for completing the activity.
    - Each program will designate an **onboarding coordinator** that has primary responsibility for maintenance of the program.

3. Required program activities
    a. Orientation to work unit for all new employees.
    b. Communicate an onboarding contact to the new hire.
    c. New hire and supervisor are scheduled to meet on employee's first day.
    d. Each new hire is assigned a peer partner.

    > Activities b, c, and d are recommended, but optional, for Faculty, student assistants, and Employees-in-Training. All activities are required for Academic and University Staff employees and Limited Appointees.

4. Program evaluation
    - Collect feedback from each new employee about their onboarding experience at least once within the first year of employment.
    - OHR will collect feedback from new employees on a regular basis.

5. Document control and retention
    - Divisional human resource representatives shall maintain a copy of all programs within their division.
    - Each college/school/division shall maintain a list of its designated onboarding coordinator(s).

Supporting Tools

The final content area of the policy outlines supporting tools, definitions, and a responsibility chart.

Tools and resources will be reviewed and updated to reflect the needs of campus. Your primary contact for onboarding consultation is:
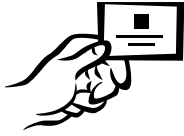
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YOUR ONBOARDING PROGRAM

STAGES AND ACTIVITIES

Whether you are building a program from scratch or enhancing an existing program, it is important to break down the time frame into manageable elements. Integrating into a new job and environment takes time and each stage has a particular objective.

Stage	Objective	Sample New Hire Activities
1. Pre-Boarding – Preparing for the first day	Positively impact the candidate's first impression. Prepare them for employment and complete some administrative requirements.	• Reviews information about the University, department, role • Completes initial paperwork • Receives welcome from coordinator • Receives welcome from supervisor • Receives onboarding plan
2. First Day	Welcome the employee. A day of discovery, administrative tasks, introductions and settling in.	• Meets with coordinator • Meets with supervisor • Meets peer partner • Tours workspace and department • Meets colleagues • Completes HR details
3. First Weeks	Help the employee get acquainted with the University, school/college/division, unit, colleagues, and role.	• Meets with supervisor to discuss expectations and training plan • Meets with peer partner • Registers for Benefits 101 and the campus New Employee Orientation • Works with peer partner to learn about the culture of the division and unit • Begins on-the-job-training or shadows • Introduced to partner departments and associated units to learn their functions
4. Six months and one year	The employee is a productive member of your team and the University, but continues his or her onboarding. Onboarding is an ongoing learning process.	• Attend training • Continue meeting with peer partner as needed • Frequent check-ins with supervisor • Discuss development plan with supervisor • Completes evaluations of the onboarding process

RESOURCES

Templates and samples can be found on the OHR website in the Onboarding Toolkit.

Learn with your peers by joining the Onboarding Community of Practice. This CoP meets quarterly to network and learn from each other. Contact the [Communities of Practice Office](), communities_of_practice@ohr.wisc.edu, for more information.

Contact the Onboarding Consultant to review your current program.

> Find the following resources and more in the Onboarding Toolkit on the OHR website.
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> - Sample master schedule/checklist
> - Peer Partner resources
> - Supervisor resources

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CHECK FOR UNDERSTANDING

1. Onboarding is…
    a. A one-day training session conducted by human resources
    b. A year-long process that begins before the employee arrives for their first day
    c. Providing new hires with bagels and coffee
2. The goals of onboarding include:
    a. Frustrate, Exacerbate, Consolidate
    b. Ignore, Overwhelm, Disengage
    c. Accommodate, Acculturate, Accelerate
3. Which of the following is not an outcome of onboarding?
    a. Pay increases
    b. Employee retention
    c. Faster time-to-productivity
    d. Job satisfaction
4. Which one of the following is not a typical role in the onboarding process?
    a. Manager/Supervisor
    b. Peer Partner
    c. The Chancellor
    d. Onboarding Coordinator
5. The Onboarding Policy outlines expectations for all of the following, except:
    a. Program development
    b. Standardized position descriptions
    c. Required program activities
    d. Program evaluation
6. Which of the following is not a recommended onboarding activity for all new employees:
    a. Learning the lyrics to Varsity
    b. Meeting with his/her supervisor on the first day
    c. Receiving a peer partner
    d. Receiving an orientation to their work unit
7. Which of the following is not a recommended stage in the onboarding process?
    a. Pre-boarding
    b. First day
    c. Twenty-fifth day
    d. One year
8. Which of the following are resources available to assist with onboarding?
    a. Onboarding Community of Practice
    b. Onboarding Toolkit on the OHR website
    c. Onboarding and New Employee Programs Consultant
    d. All of the above

Answers: 1. b, 2. c, 3. a, 4. c, 5. b, 6. a, 7. c, 8. d