



Superior Onboarding: Superior Employee

Everything you need for a superior onboarding experience

DRAFT

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University of Wisconsin – Superior Human Resources Department

You never get a second chance to make a first impression.

The faster an employee can feel welcome and comfortable in their new position, the sooner they can actively contribute to the mission of the university. Equally important is how UW Superior can prove itself to the new employee. (Maurer, 2015)

Onboarding helps new employees adjust to their jobs by establishing better relationships to increase satisfaction, clarifying expectations and objectives to improve performance, and providing support to help reduce unwanted turnover. Good onboarding results in good retention rates and superior employees.

Throughout its history, the University of Wisconsin-Superior, a small liberal arts university, has committed to improving the lives and livelihoods of people in northwestern Wisconsin and beyond by seeking knowledge and spreading it to all who may benefit. [History and Mission of our Campus](#)

Such commitment is reflected in our mission statement:

"The University of Wisconsin-Superior fosters intellectual growth and career preparation within a liberal arts tradition that emphasizes individual attention, embodies respect for diverse cultures and multiple voices, and engages the community and region." (Approved by the University of Wisconsin Board of Regents, Feb. 2015)

In our vision statement:

The University of Wisconsin-Superior will be known as an institution that transforms learners, engages the community, and enhances the vitality of its region.

And in our value statement:

At the University of Wisconsin-Superior, we are committed to academic excellence, with an emphasis on student-focused learning, intellectual and personal development, continuous improvement, inclusivity, community partnerships, and global awareness. [Superior Visions 2020 Strategic Plan](#)

We value the liberal arts mission which is: an education in studies that provide general knowledge and develop intellectual ability. This type of education prepares students for many opportunities in today's workplace through the following:

- Prepares students to work in a variety of jobs
- Degree is appealing to employers. Employers like liberal arts graduates because they have the skills necessary to adapt in a changing workplace. Employers desire **transferable skills** (skills employees take with them to any job) typical of a liberal arts education
- Provides an excellent foundation for graduate study in health care, law, business, or other fields.
- Creates graduates who are equipped with the skills to become valuable community members.

What is onboarding?

Onboarding: Onboarding is the process by which new hires get adjusted to the social and performance aspects of their jobs quickly and smoothly, and learn the attitudes, knowledge, skills, and behaviors required to function effectively within an organization. (SHRM.org) (Bauer, p. 1)

There are two types of onboarding; *informal and formal*.

Informal onboarding consists of a process by which a new employee learns and adjusts to their new job without a designated plan. It is a “hit or miss” process and does not provide consistency across the university. (Bauer, p. 2)

Formal onboarding consists of a written document and a plan that outlines the specific timeline, goals, responsibilities and support available to new employees. Formal onboarding helps employees succeed because it lays out expectations in regard to what the employee should do and what assistance the employee can expect. A written formal plan provides the most effective means of onboarding as it is communicated to all members of the UW-Superior campus and it can be applied consistently and monitored over time.

Past research has found that new employees receiving large amounts of accurate information about the company and their new job tend to adjust better than those who don't acquire this information. (SHRM.org)

When new employee onboarding is done correctly at UW-Superior, it can create a more satisfied employee. Based on the recent campus climate survey, employees want to be recognized, appreciated and valued. Part of that valuation is based on how well the campus ‘greet’ its new employees, orientates its new employees and invests in its employees. Therefore; onboarding can lead to:

- Higher job satisfaction at UW-Superior
- UW-Superior commitment
- Increased morale as employees see themselves as ‘valued’
- Higher performance levels
- Career success
- Lowered stress and makes the job more enjoyable

Learning outcomes from the Onboarding process

When onboarding is done properly and thoroughly, a new employee should know:

- The university mission, value and vision statements and apply them to their work;
- The value of a liberal arts education;
- The current focus and/or initiatives (i.e. Strategic Plan, HLC, etc.) the university is working on;
- History of university, recent/past initiatives (i.e. Program Prioritization);
- Their job expectations and requirements;
- Major departments, units and organizations;
- Where to find supplies and/or equipment and the processes used to acquire supplies;
- Software, IT, shared accesses, lists and how to use;
- Funding structure of the unit, department and campus;

- Where or who to contact in regard to campus policies and/or procedures;
- Lines of communication used and for what purposes.

When does onboarding begin?

Onboarding begins with the recruitment process. When UW-Superior begins the search for an employee to fill a vacant position is when the university begins its onboarding process. Recruitment begins with a revised, updated and accurate position description. It is the responsibility of UW-Superior supervisors to provide an accurate description of the job expectations, responsibilities, knowledge and skills associated with the position.

Steps for the decision, approval and recruitment process:

- Position description (PD) submitted to HR for accurate titling & determination of salary range
- Approval from Chancellor’s Staff to move forward with recruitment
- Search process begins
 - Academic Staff (AC) – work with HR office
 - Administration/Limited Appointment – work with HR office
 - Faculty – work with Provost’s office
 - University Staff (US) – work with HR office
 - University Staff Temporary (UST) – work with HR office
- Determine a Search & Screen committee (size, WHO, search support, budget parameters)
- Review the recruitment/hiring process with a “Charge” meeting
- Determine the timeline for the search process; posting, application review date, phone interviews, etc.
- Determine the schedule for face to face interview and make arrangements
- Determine WHO will conduct and WHEN reference checks (both listed and blind) will occur
- Equally important is the university information that is posted on our website and available to potential candidates. Listed below are websites that the supervisor can send to the new hire.

[General Campus information](#)

[UW System General Information](#)

[Annual Clery report](#)

[Superior Chamber](#)

[Perfect Duluth Day](#)

[Cost of living comparison](#)

[Housing, rentals](#)

[Indeed Job Posting](#)

[Monster Job Posting](#)

[Child care options](#)

[Superior School district](#)

[Duluth School District](#)

Once a verbal offer has been made, it cannot be finalized until after a criminal background check (CBC) has been run, reviewed and passed. Contact the HR department with the name of the finalist and their e-mail address. The HR department will continue the process and paperwork to complete the hire. Once

the hiring process is complete call the employee and welcome them. Also, be sure to let the department staff know of the new employee and when they will be starting. (Please refer to the HR Recruitment Guide for complete steps in the recruitment process.)

Prior to First day

One of the most important steps in the onboarding process is pre-onboarding. What can be done prior to the new employee starting to make them feel welcome at UW-Superior? This lays the groundwork for the full onboarding experience and again sends a message that we value our employees. It increases the new employee's excitement and anticipation while beginning to foster a relationship between them and the campus.

As the manager or supervisor of a new employee, use the checklist (**Appendix A**) to help you identify ways to make your new employee feel valued and welcomed. If possible make appointments with various departments for the employee's first day. (Ex. YU Front Desk for ID; Communications & Marketing for campus photo; HR Department for payroll and benefits information, etc.) It may seem like a lot of work but it is better to "front load" the efforts of onboarding a new employee than try to catch up later. Managers play a critical role in onboarding new employees, however, peer mentors provide safe sounding boards for new employees to ask questions, gain knowledge and explore the culture. Onboarding is everyone's job—not just HR's, nor the manager or supervisor of the new employee. The campus community plays a critical role in providing support, knowledge and a welcoming climate.

The UW-Superior Human Resources department also provided a sample e-mail (**Appendix B**) that a manager or supervisor could send to a new employee, OR create your own. Just be sure to send them this valuable information prior to their arrival on campus. We also recommend that you invite others in your office to send a welcome e-mail to your new employee.

First Day Experience

Plan a phenomenal first day. Focus on experiential learning about the UW-Superior campus and provide an awesome impression for their new career at UW-Superior. Consider bringing in goodies or hosting a welcome breakfast with your team (non-University paid/sponsored) – perhaps a potluck?

Start with an agenda. This will help you plan an informational yet dynamic experience.

Sample Agenda: First Day

7:45am – 8:15am Welcome with the manager or supervisor; have employee settle into their office/desk/service area

8:15am – 12:00pm Thorough tour of department and building (be sure to point out restrooms, copier and supply room, break rooms, where the vending machines are located in the building, etc.)

Where to find equipment and resources across campus and departments; be sure to stop in the Chancellors office if available. Point out dining services; stop in at the YU Front Desk for ID (make an appointment prior); Appointment for campus photo

in the Marketing and Communications Department

12:00pm – 12:45pm Lunch with (names)

12:45pm – 1:00pm Break

1:00pm – 3:00pm HR meeting to complete new employee paperwork; meet with Benefits Manager to allow ample time for decision(s) and enrollment(s) – packets listed below have already been sent to employee with contract and position description via e-mail

- ✓ Human Resources [New Employee Paperwork](#) Packet Includes:
 - [Confidentiality Acknowledgement](#)
 - Emergency Contact
 - I-9
 - Direct Deposit Form
 - W4 and Self Identification
- ✓ Human Resources New Employee Information Packet includes:
 - [Publicity Waiver](#) – return to Chancellor’s Office
 - HR Training Letter – EO #54; Sexual Harassment; Title IX
 - [Registrar’s Office Training Letter](#) – FERPA
 - [Safe Alert](#)
 - [Employee Assistance Program](#) (EAP)
 - Important links to governance, policies and procedures at UWS
 - [University Staff](#)
 - [Academic Staff](#)
 - [Faculty and Instructional Administrative/Limited](#)
 - Professional Development
 - [University Staff](#)
 - [Academic Staff](#)
 - [Faculty and Instructional](#)
 - [Policies and Procedures](#)
 - [Volunteer Service Hours](#)

3:00pm – 4:00pm Meet with members of new employee’s department

4:00pm -4:30pm Review of day; next steps with the manager or supervisor

New Welcome Guide (Appendix C)

First two weeks Essentials – Superior Supervisor Checklist (Appendix D)

First Month Review- Superior Supervisor Checklist (Appendix D)

First Quarter Tools (Appendix E & F)

As mentioned at the beginning of this document, the first 90 days are critical to a new employee's success. This is also the point where the new employee's manager or supervisor takes on more of the onboarding process. It is important to train and manage the new employee effectively.

To assist managers or supervisors with this task, please see a list of "check-in" questions (**Appendix E**) for the manager to ask the new employee. This conversation could occur over weekly 1-on-1's or over a cup of coffee. This list of check-in questions should assist in creating an open and welcome working relationship, help to build trust and help to identify how the manager or supervisor can better help the new employee transition to their role in the campus community.

Also, the manager or supervisor should help the new employee create some measurable goals. Use the template (**Appendix F**) to set expectations, clearly define what success looks like and keep new employees highly engaged. Include a combination of quick-wins and long term goals that will give new employees a sense of accomplishment and lasting impact.

This is also the time to document the review process.

- ✓ Three month schedule (University Staff):
 - Performance appraisal [insert where to find form] and submit to Human Resources
 - Determine performance goals – short term and long term (**Appendix F**)
- ✓ Six month schedule (University Staff, Academic Staff and Limited):
 - Performance appraisal [insert where to find form] and submit to Human Resources
 - Determine performance goals – short term and long term (**Appendix F**)
- ✓ Twelve month schedule

Measuring Superior Success (Appendix G)

Feedback is one of the best ways to ensure success of a program. The Superior onboarding plan should be reviewed and updated as needed and as appropriate. We cannot manage what we cannot measure.

Employee Offboarding – The Big Wins of a Superior Goodbye

To create a positive and superior goodbye, it's important to discover and address important improvement issues. A proactive program allows for a consistent pathway thereby potentially keeping UW-Superior in contact with alumni top talent. A smooth and consistent plan allows for transfer of knowledge, a method to collect valuable feedback and an organized way to wrap-up or transfer projects or work assignments.

Upon Notice...

- Obtain and accept a resignation/retirement letter from employee (unless involuntary) and submit to HR
- Confirm employee appointment with benefits
- Employee should schedule a meeting with HR to discuss benefits, paid time off balances, retirement plans, sick leave accrual, etc.
- Enter employee departure date in HRS to end the appointment

- Begin processing any outstanding TER's or other expenses that maybe due the employee
- Begin processing paid time off and/or leave balances

Two weeks in advance of departure date...

- Notify campus stakeholders or appropriate campus employee/departments of employee's departure
- Schedule a final manager or department lunch/happy hour with departing employee (must be paid with personal funds)

Within last few days of departure date...

- Provide reliable contact information for future correspondence
- Conduct exit interview for feedback (either online survey or in-person meeting)
- Collaborate with employee on list of current projects or tasks and determine 'where' and to 'whom' those projects and tasks are re-assigned
- Determine if email/voicemail will be forwarded and to whom
- If automatic deductions are taken from pay, be sure to end according to departure date
- Meet with Benefits manager to review COBRA exit information regarding leave balances and payroll

On the last day...

- Ensure employee has removed all personal items from the workspace and/or office
- Return all campus keys, credit cards, parking permit
- Ensure employee has returned any campus issued electronic device (laptop, ipad, etc.)

After departure...

- Send follow-up termination information (COBRA, etc.), if not completed within last few days of departure date
- Remove from recurring meeting schedules; update org charts, company contacts, etc.
- Ensure employee has access to payroll and W2 information after departure
- Review the exit interview to assist with potential improvements
- Move I-9 and personnel file from active to inactive

New Employee- Supervisor’s Checklist

New employees are a tremendous asset to the University community. The University’s employees are our most critical investment in achieving our vision, mission, and goals.

Long term retention of any new employee starts at recruitment. Now that you have your new employee recruited with a planned start date, you want to foster their (and your) success. Use this checklist to ensure that you have all of the needed elements to assist your new hire the best start possible.

BEFORE THE START DATE	
SCHEDULE AND JOB DUTIES	
<input type="checkbox"/> Call employee following notification from HR to officially welcome employee	<input type="checkbox"/> Confirm start date, place, time, dress code, parking, etc. <input type="checkbox"/> If unfamiliar with campus, mail or e-mail campus map with parking area and building highlighted <input type="checkbox"/> Provide supervisor’s contact information <input type="checkbox"/> Confirm with HR that a temporary parking pass has been sent <input type="checkbox"/> Appoint a mentor for new hire
<input type="checkbox"/> Set up meetings with critical people for the employees’ first few weeks and add to new employee’s calendar	<input type="checkbox"/> Contact your HR professional and confirm new meeting date and time to complete necessary paper work, and schedule benefits meeting
<input type="checkbox"/> Create agenda/tasks for the employee’s first day. Put together WELCOME PACKET from the department and include the information listed on the right:	<input type="checkbox"/> Job description <input type="checkbox"/> Probation information (if appropriate) <input type="checkbox"/> Department/Unit organization chart <input type="checkbox"/> Contact names for the department <input type="checkbox"/> Department/Unit phone/email list <input type="checkbox"/> Mission/vision and guiding principles for UWS and department/unit <input type="checkbox"/> Schedule for first week <input type="checkbox"/> Ongoing Schedule <input type="checkbox"/> Authorization forms when appropriate (driver authorization , key request authorization , pro-card ...) <input type="checkbox"/> Schedule a campus tour with mentor, add to new hire employee’s calendar
SOCIALIZATION	
<input type="checkbox"/> Notify your department of the new hire	<input type="checkbox"/> Send via email to department <input type="checkbox"/> Copy the new employee, if appropriate <input type="checkbox"/> Include start date, what their job will be, and employee biography

	<input type="checkbox"/> Print list of campus acronyms – fill in names of current department directors <input type="checkbox"/> Provide link to campus FAQ's on HR website page
WORK SPACE	
<input type="checkbox"/> Clean the work area	<input type="checkbox"/> Remove any personal items left by predecessor <input type="checkbox"/> Pull together basic office and/or desk supplies <input type="checkbox"/> Order name tag and business cards from University Relations <input type="checkbox"/> Complete Facilities Management work order for desk/name plate <input type="checkbox"/> Verify working computer
TECHNOLOGY ACCESS AND RELATED	
<input type="checkbox"/> Contact technology services team to have the system set up in advance	<input type="checkbox"/> Order computer, if necessary <input type="checkbox"/> Arrange for phone installation Consider software needs of the job such as: <input type="checkbox"/> Outlook set up <input type="checkbox"/> Identify and request access to shared drives <input type="checkbox"/> Daily software needs <input type="checkbox"/> Printer connections <input type="checkbox"/> Departmental portal and network access <input type="checkbox"/> Add name/address to email lists
SUPERVISOR FILE	
<input type="checkbox"/> Create a department personnel file	<input type="checkbox"/> Copy of contract, position description
ADDITIONAL: _____	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

New Employee- Supervisor's Checklist

EMPLOYEE'S FIRST DAY	
<input type="checkbox"/> Welcome them upon arrival	Understand that they may be nervous; try not to overwhelm them with too much too soon. <input type="checkbox"/> Provide overview of the first day and work week <input type="checkbox"/> Provide new hire with Welcome Packet <input type="checkbox"/> Option: provide new hire with UWS schwag (T-shirt, notebook, pens, etc. Note: these items cannot be purchased with campus funds.)
<input type="checkbox"/> Introduce them to department and team members	<input type="checkbox"/> Introduce mentor <input type="checkbox"/> Break/lunch areas, vending, where to store personal belongings <input type="checkbox"/> Restrooms
<input type="checkbox"/> Review job description	<input type="checkbox"/> Discuss expectations for job <input type="checkbox"/> Review welcome packet
<input type="checkbox"/> Introduce them to work area	<input type="checkbox"/> Complete form to access needed keys to office <input type="checkbox"/> Complete Driver Authorization form and return to Parking Services <input type="checkbox"/> Safety procedures/policies- where campus Emergency Response Plan is located/ Alert <input type="checkbox"/> Overview of software and other technology use (calendar system, phone/voicemail (provide instructions), computer, email, internet, our website, shared files/drives etc.) <input type="checkbox"/> Explain Staff Digest/how to use/ how to post <input type="checkbox"/> Campus mail/addressing procedures <input type="checkbox"/> Review department funding and budget <input type="checkbox"/> Relevant websites <input type="checkbox"/> Show them how to order office supplies <input type="checkbox"/> Show them how to use the copier, and provide copy codes <input type="checkbox"/> If additional technology training is necessary, contact the technology help desk at x8300 <input type="checkbox"/> Explain IT Help Desk services
<input type="checkbox"/> Review department and/or job classification policies	<input type="checkbox"/> Review schedule, start times/end times and time reporting <input type="checkbox"/> University calendar, holidays and personal holidays <input type="checkbox"/> Process and recording for sick leave, vacation time/request <input type="checkbox"/> Overtime and comp time policies (if appropriate) <input type="checkbox"/> Emergency procedures for department

	<input type="checkbox"/> Inclement weather policy & procedure <input type="checkbox"/> Security protocols and building hours <input type="checkbox"/> Campus Emergency Response Plan (ERP) where to find; what to know <input type="checkbox"/> Dress code <input type="checkbox"/> Campus policies and procedures <input type="checkbox"/> Proper phone and computer use <input type="checkbox"/> Department traditions and recognition events <input type="checkbox"/> Online resources for additional information such as the campus directory <input type="checkbox"/> Provide list of current department projects and cyclical programs, highlighting roles of other department members <input type="checkbox"/> Arrange for access to shared drives; list serves
<input type="checkbox"/> Introduce them to the campus	<input checked="" type="checkbox"/> Take them on a tour of the campus, thoroughly introduce them their home building <input type="checkbox"/> Show them elevators, stairs, exits, restrooms, break areas, etc. <input checked="" type="checkbox"/> Show them how to open/close office (if appropriate) <input type="checkbox"/> Show them mail area <input type="checkbox"/> Introduce them to key departmental people such as mailroom staff, payroll staff, etc. <input type="checkbox"/> Show them where to obtain their ID in the YU/ explain how to put "Jacket Cash" on their ID card <input type="checkbox"/> Show them the Parking services building where they will be issued keys and a parking permit, if applicable <input type="checkbox"/> Show them the MWC/explain membership opportunities
<input type="checkbox"/> Arrange lunch on the first day	<input type="checkbox"/> Include other employees if possible (cannot use campus funds)
<input type="checkbox"/> Have them complete any required forms with Human Resources	<input type="checkbox"/> Signed contract <input type="checkbox"/> Benefit forms if appropriate <input type="checkbox"/> W4 <input type="checkbox"/> I-9 <input type="checkbox"/> Direct Deposit <input type="checkbox"/> Other: _____
<input type="checkbox"/> Give them their first assignment	<input type="checkbox"/> Make it small and doable so they feel like they have already accomplished something
<input type="checkbox"/> During the first week, meet or touch base with employee <u>daily</u> to answer questions	<input type="checkbox"/> Inquire of first day/first week went <input type="checkbox"/> Make time to listen to any questions <input type="checkbox"/> Encourage them to ask questions <input type="checkbox"/> Explain your work style and discuss how it will fit with the style of the new employee

New Employee- Supervisor's Checklist

FIRST THREE MONTHS

Check in with employee to let them know how they are doing and answer questions they may have

Determine performance goals both short term and long term

University staff are required to complete a three month review

Additional: _____

FIRST SIX MONTHS

Check in with employee to let them know how they are doing and answer questions they may have

Review performance goals and ability to meet goals

University staff are required to complete a six month review

Additional: _____

ANNUALLY

Check in with employee frequently-let them know how they are doing and answer questions they may have

Schedule annual performance review and set performance standards for the upcoming year

Performance evaluation- Review position description and make appropriate updates

Additional: _____

Appendix B

New Employee Sample Email

Dear [first name],

Welcome to UW-Superior! We look forward to your arrival on [Day of week, Month, date]. Please plan on meeting with [name, position] at [time] in [building and room number] for brief orientation where you will learn more about UW-Superior. We will arrange for your campus photo and ID pictures, so please plan accordingly. Here's everything you need to know for your first day on campus.

NEW EMPLOYEE FIRST DAY SCHEDULE

[Weekday, Month, date]

7:45am – 8:15am Welcome with [Name]

Tour of department and building
Where to find equipment and resources
Lunch with [names]

1:00pm – 3:00pm Meet with HR to discuss paperwork, payroll, time reporting & benefits

3:00pm – 4:00pm Meet with [department specific]

4:00pm -4:30pm Review of day; next steps

WHAT TO BRING

- Refer to the list that was sent to you from the HR department, along with your contract
- A big smile 😊

PUT A #HASHTAG ON IT OR LIKE UWS ON FACEBOOK!

Ready to show some UW-Superior pride? Share your excitement with the social networks you love most by using our UW-Superior hashtag [#] or "like" us at [FB page info]. We can't wait to see your posts!

GET CONNECTED! (Include an invitation to a campus event such as the example below.)

Get answers to some of your burning UW-Superior questions and meet other new employees at the "jacket fest" campus event on Tuesday, September 13, 2016. Campus activities like this show you why UW-Superior is one of the best places to work!

Once again, congratulations and welcome. We are lucky to have you join our campus community.

[Name]

[Position]

UW-Superior



Appendix C

New Welcome Guide

Welcome [new employee name]

We are thrilled you joined our campus community. Hopefully this guide will provide you with additional campus and system information you'll need as a new employee.

Welcome

[Welcome from System President](#), Dr. Ray Cross

[Welcome from Chancellor](#), Dr. Renee Wachter

Learn more about UW-Superior

Campus history [link]

[Campus Organization Charts](#)

[Fact book](#)

Research facilities: [Lake Superior National Estuarine Research Reserve](#) (LSNERR)

[Lake Superior Research Institute](#) (LSRI)

[Transportation & Logistics Research Center](#) (TLRC)

[Great Lakes Maritime Research Institute](#) (GLMRI)

Intranet access [link]

[Marcovich Wellness Center](#)

Helpful resources

[City of Superior](#)

[City of Duluth](#)

[Campus frequently asked questions](#)

Appendix D

Superior Supervisor Checklist

Set- up for Superior Success; Checklist for the first 1-2 weeks:

The University core concepts including mission, vision, values, history, etc. should be a topic for discussion with the new employee. After discussing the campus mission, it's a great idea for the supervisor to explain the mission of the department/unit and then help the new employee develop their own personal mission statement. Keeping the mission at the forefront develops a connected/invested feeling by the employee. By encouraging the new employee to develop a personal goal/mission also encourages the connection and investment.

Topics for additional discussion between the Supervisor and the new employee include:

- ✓ Historical video produced by University Relations –watch it together and discuss the importance and relevance of the campus to local history.
- ✓ Review the campus strategic plan, pointing out the plan, the metrics, what has been done and what continues to be the focus.
- ✓ Review the Higher Learning Commission (HLC) part in our university. As the body for higher education accreditation, it's important for new employees to know and understand the value of HLC.
- ✓ Have an in-depth conversation about the campus “fact book” -where it's located and facts it contains.
- ✓ Review the UW System website- information it contains, how it pertains to the UW-Superior campus, how the campus interacts with the System
- ✓ Review the governance structure of the UW System, the 13 comprehensive campuses, and the 13 two-year Colleges, the Board of Regents, President of the System, etc.
- ✓ Review the governance structure of the campus; service requirements, committee and/or membership involvement and responsibilities.
- ✓ Review where campus organization charts are located ([HR page on the website](#))
- ✓ Review where campus policies and located. ([Campus policies and procedures](#))
- ✓ Review student complaint process; and process for employees.
- ✓ Review current initiatives such as Innovation grants; Advising Model; ASSIST; campus climate study.
- ✓ Campus calendar – what it is, where it is, how to submit event
- ✓ Review job role and responsibilities
- ✓ Discuss manager or supervisor's style and expectations
- ✓ Assign a peer mentor
- ✓ Review performance goals
- ✓ Schedule meetings with key departments:
 - Purchasing: Determine if a P-card or T-card are needed; complete application; how to make purchases; field orders; purchase orders Pro card or travel card; Will they be a site manager for anyone's pro card?
 - Business Services: Travel regulations; how to complete Travel Expenses Reimbursements (TER); what's allowed. WISDM access and training
- ✓ IT: services available; additional employee perks, Lynda.com How to update content on the website. PeopleSoft user training.

- ✓ Do the new hire need an email template (campus leaders)? If so, how to get one
- ✓ HR: discuss the promotion process; tuition reimbursement; additional Q's from the new employee
- ✓ Review Campus Emergency Response Plan (ERP); where is plan located; employee and/or role expectations
- ✓ Suggest Kognito Training for working with Veterans
- ✓ Ensure all technology is working; they have access to the software needed Helpdesk phone number, email address, where to go for help, etc.
- ✓ Touch base with new employee daily to answer questions
- ✓ Provide a full-year calendar of all department projects and cyclical programs describing what role(s) each co-worker has in the year
- ✓ Discuss the campus programs and events:
 - Wellness Center and monthly membership
 - Athletic Events and ability to attend and support the Yellowjackets
 - Choral and Theatre events to attend and support

Set-up for Superior Success; Checklist for the first Month:

- ✓ Schedule weekly/bi-weekly check in meetings with the new employee
- ✓ Take a walking meeting outside the office to learn more about the employee's life outside of work
- ✓ Suggest a welcome game of ping pong in the Marcovich Wellness Center OR a welcome game of pool in the Yellowjacket Union
- ✓ Explain how to apply for Professional Development funds
- ✓ Explain shared governance and the role of new employee
- ✓ Explain the campus funding and resource allocation [meet with Budget Officer if needed for position]
- ✓ Explain how to reserve meeting and conference space
- ✓ Ensure the new employee has access to shared drives
- ✓ Confirm the new employee has access to employee handbook, policies and procedures
- ✓ Check-in about benefits and pay statement:
 - Ensure they have access to the "My Wisconsin" portal
 - Answer any questions in regard to pay and benefits
 - Ensure they understand timekeeping, supervisor approval and request for time off
- ✓ Discuss performance review process; 3 month and 6 month reviews; determine performance goals both short term and long term
- ✓ Check-in with new employee's assigned mentor

Appendix E

Superior Supervisor Check-in Questions: After discussing the questions below with the new employee, please return the questions/answers to the HR department. Answers to these questions will help improve onboarding, etc. campus wide as well as within unit.

Suggested questions to ask your new employee:

1. How's it going? How do you feel about your decision to come to UW-Superior?
2. What are you enjoying most about your new role on our campus?
3. Is the campus and the department what you expected?
4. Has anything surprised you? If so, are you willing to share?
5. Has training been helpful? Do you have suggestions for adding or eliminating some training?
6. Do you have all the tools and resources needed to do your job? If not, what would you need?
7. How well have you gotten to know your co-workers in your department?
8. How well have you gotten to know others across campus?
9. Do you feel out of the loop on any subject? If so, what would you like to know or get a better understanding of?
10. What should the campus provide to new employees that we may have missed with your hire?
11. What is going well? What is going not so well?
12. Is there anything about the campus or your department that may still be unclear?
13. How can I better manage or supervise you?
14. As your supervisor, what can I do to make your transition easier?

Appendix F

Goal Setting Grid

(Form can also be used along with performance evaluation.) This grid should be used by the supervisor and new employee to set goals and objectives. Form can be used to guide the 3 month, 6 month and annual reviews.

Objectives	Key Results		Lookback	
What	Success	When	Status	Comments
Goal # 1				
What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved	
Goal #2				
What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved	
Goal #3				
What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved	
Personal/Professional Development Goal				
What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved	

Appendix G

New Employee Onboarding Survey

After the new employee completes the survey, please return the survey to the HR department. The survey will help improve onboarding, etc. campus wide as well as within unit.

New Employee Department _____ **Date** _____

	1 Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Agree
I would consider new employee onboarding very informative, highly engaging and useful.					
The length of new employee onboarding was effective enough to keep me engaged and retain all of the information.					
I have a better understanding of the campus, its leaders and the different departments.					
I understand shared governance.					
I understand the funding and resource allocations to campus.					
I have a good understanding of the campus mission and vision.					
I know where to find payroll information.					
I know how to contact IT for technology issues.					
The overall onboarding experience reflected the culture and values of the campus.					
Onboarding continued the superior experience that began with my recruitment.					
What was your favorite part about the onboarding experience?	What would you like to see added to the onboarding experience?				
What was your least favorite about the onboarding experience?	Additional comments or thoughts?				

DRAFT