

Resource Guide: New Employee Orientation Departmental Checklist

Prepared by Lane Professional and Organizational Development, 5/31/06
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To assure a smooth start with new employees, some basic functions need to happen. Following is a checklist of those functions for you to consider when orienting new employees to your division/department at Lane. These serve as a basic guideline from which divisions/department manager can add to in meeting their division/department specific needs.

Logistics	Who	Date completed
<u>PREARRIVAL</u>		
<i>Communicate Information</i> ___ Send Welcome Packet to new employee including: <ul style="list-style-type: none"> • Welcome letter – confirming position, title, salary, Manager, when & where to report (Elizabeth Andrade) • Lane Union Contract (if appropriate) ___ Call new employee to confirm start date, place, etc. ___ Send internal memo to the department announcing new employee's arrival date and duties ___ Contact payroll and benefits administration – submit appropriate paperwork ___ Notify Health and Safety about start date for new employees (Dawn Barth)	HR, in consultation with Manager	
<i>Set up appropriate schedule for training (See Appendix A)</i> ___ Banner Training ___ Technical Training (Procedures, forms, job specific skills) ___ Interpersonal Skills Training ___ Leadership/Management skills training	Manager initiate; staff assistant implement and coordinate	
<i>Prepare the work area</i> ___ Insure cleanliness and order of work area ___ Order... <ul style="list-style-type: none"> • Basic supplies • Name plate, and business cards, if appropriate, • Procurement card, if appropriate • Office keys • Telephone installation and assign number (or complete change order) ___ Arrange for computer and software installation	Staff Assistant	
<i>Assemble a NEW EMPLOYEE PACKET</i> ___ Welcome Letter from Division/Department (<i>See Appendix B for template</i>) ___ Copy of job description ___ Department structure and priorities <ul style="list-style-type: none"> • Statement of department goals/mission/vision • Department organization chart • Department phone list ("Whom to Call for What" list) • Department map • List of all current department projects 	Manager initiate; staff assistant put together	

<p>___ Division/Department Procedures</p> <ul style="list-style-type: none"> • Office supply order procedure • Severe weather plan • Personnel policies • Normal work hours/time report and procedures • Meal break/work break policies • Workplace attire information • Conflict of interest and solicitation policies • Attendance policies • Safe and healthy work environment policies • Parking procedures • Emergency procedures • Building access procedures • Telephone/email policies <p>___ Computer program manuals, or their location in the office</p> <p>___ Lane phone book</p> <p>___ LTD Transit Information and Maps</p>		
<p>___ Create plan of action for 1st day</p> <ul style="list-style-type: none"> • Identify a meaningful first work assignment • Arrange for meeting with the appropriate person in the division/department for the first day <p>___ Schedule NEO Orientation and if appropriate, a mentor (see below)</p> <p>Mentor Selection Criteria and Responsibilities</p> <p>Criteria:</p> <ul style="list-style-type: none"> • Demonstrates high performance • Is given time to be accessible to the new employee • Is skilled in the new employee's job • Is proud of the organization • Is a peer of the new employee • Has patience and good communication and interpersonal skills • Wants to be a mentor • Is a positive role model (well regarded and accepted by current employees) • Has been selected in advance and trained in mentor responsibilities <p>Responsibilities:</p> <ul style="list-style-type: none"> • Be an informational resource for the new employee on policies, procedures, work rules, norms, etc. • Help socialize the new employee • Assist in training the new employee • Be a tour guide • Identify resources • Provide introductions 	<p>Manager initiate</p> <p>Staff assistant implement and coordinate</p>	

ARRIVAL		
During the FIRST DAY		
___ Greet the employee and introduce the employee to co-workers and work areas ___ Information review (NEO packet, Benefits web site, description of relationship between the department and the institution) ___ Review job description	Manager	
___ Review process to obtain Lane ID (optional, \$5 fee) ___ Review, with employee, Health and Safety Information – (Appendix C) <ol style="list-style-type: none"> 1. Complete the Health and Safety Form in Appendix C, with the employee <ul style="list-style-type: none"> . employee initials sections on the form they have reviewed with designated dept. staff . keep copy of form for dept. records; send original to Health and Safety 1. Employee Emergency Manual (provide copy) 2. the number for medical emergencies on campus - 6666 3. the number for safety emergencies on campus - 5555 4. Inform employee that they must call Public Safety if they are on campus outside of normal college business hours. Number to call - 5558 	Staff assistant	
___ Assign first project and schedule specific feedback session ___ Review the first-week schedule of activities and assignments ___ Introduce Mentor, if using Mentor approach	Manager	

During the FIRST WEEK		
___ Send new employee to the NEO program to review Lane culture, organizational structure, and basic policies and benefits package in new employee orientation	HR	
___ Review training plan with new employee <ul style="list-style-type: none"> • See Appendix A for contacts for trainings <ul style="list-style-type: none"> ○ Banner Training ○ Technical Training ○ Interpersonal skills training ○ Leadership/Management skills training 	Manager	
___ With the new employee review the department structure and priorities section of the welcome packet <ul style="list-style-type: none"> • Statement of department vision/mission/goals • Department organization chart • Department phone list ("Whom to Call for What" list) • Department map • List of all current department projects and priorities 	Manager and appropriate staff assistant	

<ul style="list-style-type: none"> • The new employee's relationship with other roles in the department <p>___ Describe customer service, and performance expectations for the College, Divisions/Department</p> <p>___ Team review - review teamwork expectations; set up 1:1 meetings with team members and other resources</p>		
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During the FIRST MONTH

<p>___ Meet bi-weekly with the new employee to answer questions and insure that the new employee is becoming acclimated to the department and position responsibilities.</p> <p>___ Discuss the guiding principles and how the new employee has seen them "in action" within the department</p> <p>___ Insure that employee has signed up for benefits</p>	Manager and/or appropriate staff	
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During the FIRST 90 DAYS

<p>___ Establish performance goals with the new employee</p> <p>___ Set schedule of meetings to review progress of new employee in meeting the performance goals</p>	Manager	
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ONE MONTH PRIOR TO THE END OF PROBATIONARY PERIOD

<ol style="list-style-type: none"> 1. Conduct performance review 2. Meet with the employee to review performance 3. Set plan for professional development and/or termination 	Manager	
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AFTER PROBATIONARY PERIOD

<ol style="list-style-type: none"> 1. Celebrate the completion of the probationary period 2. Regularly review progress of the employee 	HR and Manager	
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Appendix A: Access and Training Contacts

Express Lane Banner Roles – Access and Training

Intro to Banner and Banner Navigation and IT Software - Michael Levick, levickm@lanecc.edu

Banner Modules

- Enrollment Services – Helen Garrett, Director of Enrollment Services/Registrar, garretth@lanecc.edu
- Financial Aid – Bert Logan, Director, Student Financial Services, loganb@lanecc.edu
- Faculty and Advisor Services – Helen Garrett, Director of Enrollment Services/Registrar, garretth@lanecc.edu
- Employee Services - Dennis Carr, Executive Director of Human Resources, carrd@lanecc.edu
- Personnel Information – Dennis Carr, Executive Director of Human Resources, carrd@lanecc.edu
- Financial Information – Stan Barker, Accounting Manager, barkers@lanecc.edu

Technical Training Checklist

- Understanding the Colleges Policies and Procedures - COPPS
- Safety and Risk Management Issues – Sandy Ing-Wiese, Manager, Health and Safety, wises@lanecc.edu
- Labor Relations
 - Classified Staff – Bob Baldwin, baldwinb@lanecc.edu
 - Faculty – Jim Salt, saltj@lanecc.edu
 - Human Resources, Dennis Carr, carrd@lanecc.edu, or Mary Glenn, glennm@lanecc.edu
- Job Specific Equipment and Competency Training contacts will vary by need

Interpersonal Skills and Leadership/Management Skill Development

Check www.lanecc.edu/pod website under “Programs” for a list of programs that can be tailored and offered to the division/department, or contact Pam Farmer, Manager, POD, farmerp@lanecc.edu for individual coaching.

Appendix B: Welcome letter template

The following template is an example of a cover letter divisions or departments can use with the welcome packet they put together for new employees. This would be delivered to the new employee on the first day of their employment for review with the manager and/or the designated staff assistant.

MEMORANDUM

TO: <name of new employee>

FROM: <Division/Department Manager>
<Designated staff assistant>

RE: New Employee Orientation in the Division/Department

DATE: <Date>

Welcome to the <Division/Department name>. We are delighted to have you join us and look forward to helping you transition into this new position.

The purpose of <Division/Department name> is <Division/Department mission statement>. The unique knowledge and skills you bring to this position will help us meet our mission.

We have prepared the attached packet of information to help you get acquainted with our department. Our first task today will be to review this information with you and to answer any questions you have.

We look forward to working with you.

Appendix C: Health and Safety Form

The Health and Safety Form is to be reviewed with the new employee, before the end of the first week of employment. The designated staff is asked to have the new employee initial by each section of the form after it has been reviewed. The department keeps a copy for their records, and the original is to be sent back to Health and Safety (Dawn Barth) immediately following the meeting to review the document.

The form is being finalized now (9/13/06) and will be sent to Managers to include with this checklist.