

SAMPLE Workgroup Report

ONBOARDING WORKGROUP REPORT

Workgroup Report FY 14-15



WORKGROUP MEMBERS

Janna Le Blanc, Riverside
Michael Luttrell, Santa Cruz
Rejeana Mathis, Los Angeles - Chair
Rochelle Niccolls, Berkeley

June 2015

Executive Summary	1
Introduction.....	3
Research and Findings	
Benefits of Onboarding.....	5
Campus Interview Summary by Question.....	7
Onboarding Survey Summary.....	11
Recommendations and Best Practices.....	19
Conclusion.....	26
Appendix A: Onboarding Interview Guide for Campus Contact	27
Appendix B: Summary of Campus Responses to Interview Guide.....	28
Appendix C: 2015 CUCSA Onboarding Survey.....	33
Appendix D: Onboarding Checklist.....	35
Appendix E: Sample Staff Assembly Welcome Letter.....	39
Appendix F: Cited Works.....	40

I. Executive Summary

In 2015, Council of University of California Staff Assemblies (CUCSA) initiated an Onboarding Workgroup charged with researching onboarding practices at University of California entities and those of comparable benchmark organizations. For purposes of this project, the onboarding process consists of pre-hire practices, compliance issues, logistics and resources required, and the community connection. The work group's goal was to recommend general best practices and clarify the role that the local Staff Assembly could play in the onboarding process. To assess UC's practices, interviews were conducted with campus contacts, and local Staff Assembly members and affiliated committees were surveyed regarding their onboarding experiences.

The workgroup found that practices, support and expressed leadership commitment for utilizing a formal centralized onboarding process were inconsistent across all campuses. While most campuses do not have a formally designed comprehensive onboarding process, all of them diligently address the compliance elements of onboarding, such as background checks, I-9s, and W-4s. Local Human Resources typically plays a key role in establishing the new hires campus connection, particularly through initial recruitment efforts and coordinating campus New Employee Orientation (NEO). Hiring managers or departments are generally expected to help staff become more deeply integrated into the organization. Participation in, duration of, and tracking are also not consistent across campuses. Those campuses that measured the impact of their onboarding efforts reported streamlined processes, reduced time to fill positions, and significant cost savings.

On average, the respondents to the Onboarding Survey felt that their onboarding experience met expectations, which was indicated as a '3' on a scale of 1 to 5. The lowest rated item was "I had a thorough understanding of the University's and/or department's mission and vision statements, structure, and core values early in my employment," with a score of 2.7. The highest rated item was "How satisfied were you with the welcome you received from your department?" with a score of 3.7. While these scores are not low, they are not necessarily indicative of a university system that prides itself on excellence. This Staff Assembly-affiliated survey pool was particularly amenable to the UC system, yet the large majority found their onboarding experience left them with a neutral feeling about working for the University.

Some survey respondents described onboarding, particularly NEO, as informative, yet having been stripped down to the bare necessities. Missed opportunities include sharing campus priorities, such as Sustainability, making mentoring connections, or reviewing mission-vision-values-related information. Per the survey, only 10% of respondents

became familiar with Staff Assembly during their onboarding process, with one respondent saying, *“At my location, the new employee orientation is all about the technical stuff - benefits, retirement, etc. All that is important but a presentation by Staff Assembly would tell me more about the culture and community of my location.”*

Participant recommendations also include ensuring that financial planning advice is offered to new employees, offering new hire campus-branded token/small gift, and holding mixers for new and existing staff.

The Onboarding Workgroup supports and has integrated a number of the survey respondents recommendations into a list of optimal and minimal recommendations. A key priority is to gain senior leadership commitment to onboarding and implement a concerted marketing effort that will reinforce awareness and buy-in. Databases or a best practice checklist are critical to facilitating adherence to a standard practice. Importantly, involving Staff Assembly in the onboarding process will extend the hiring manager's reach and provide a broader perspective of the campus. Sharing the responsibility of onboarding and designating accountability will ensure multiple needs are efficiently addressed. Formal training or web-based resources can reinforce hiring managers understanding of and comfort with the process. Department-specific efforts, in conjunction with HR orientation efforts, provide new hires with a comprehensive view of the organization. Surveying new hires throughout their first year on the job and if they leave the organization in the first year an exit interview would provide valuable information regarding the onboarding experience. Acknowledgement by department leadership is another chance to help new hires feel their presence is important to the organization. Other recommendations detailed more fully below include a best practice checklist that can be used to assess the strength of campus onboarding practices on an ongoing basis.

While campuses within the UC System are highly-recognized, there is a risk of becoming complacent or arrogant with regards to wooing new talent to the organization. As the job market expands, the UC system continues to face budgeting challenges that impact campuses' ability to offer competitive salaries that attract or retain top-tier talent. Research shows that a sound onboarding process can improve recruitment and retention efforts, in terms of talent and expenses, and positively impact productivity. This workgroup report is designed to provide the rationale for committing to onboarding, based on general research and UC findings, and provide campuses with a broad range of options and best practices that can be easily adopted.

II. Introduction

The Onboarding workgroup was formed in September 2014. Its' project scope was to research onboarding practices at University of California, study benchmark organizations and identify best practices. During the project planning stage, the group agreed to focus on gathering data from multiple sources in order to determine whether facts aligned with perceived needs regarding the onboarding process. Upon a preliminary review of articles, research and process regarding onboarding, the group identified three key aspects as important to onboarding:

1. Compliance
2. Logistics & Resources
3. Community Connection

Compliance includes teaching employees basic legal and policy-related rules and regulations. Logistics and resources include ensuring employees have the information, tools and equipment required to navigate the University and do their jobs. Community connection includes helping employees become integrated into the University community and understand their contribution.

As a first step, the group conducted a conference call with Donna Salvo, UCOP Executive Director of Systemwide Talent Management and Staff Development, and Elaine Peters, UCOP Director of Systemwide Talent Acquisition and Executive Recruitment, to discuss the current onboarding efforts and plans of the CHROs or Talent Management Consortium and ensure multiple groups were not conducting duplicate efforts by researching the same information. After completion of this meeting, the work group felt comfortable moving forward with initial data collection to determine the current practices on each campus.

An interview guide was drafted to gather specific information regarding each campus' onboarding process and assessment of its value. This information was needed to determine a baseline for what is currently being done across the various campuses, enabling the team to build off of that foundation. The interview guide consisted of questions relating to all three aspects of onboarding: compliance, logistics & resources and the community connection.

The next step was to determine who were the best sources or points of contact for this information. CUCSA delegates were asked to provide the names of campus contacts. This proved to be a long task, as there were multiple contacts on each campus. Many people identified an alternate contact person, who, in turn, identified additional

contacts. Ultimately, the work group was able to reach out to at least one primary source on each campus, if not more.

After a few months of collecting the critical data on specifics of each campus' onboarding activities, staff feedback was collected regarding their individual onboarding experiences. A set of questions was compiled and reviewed with fellow CUCSA delegates. This survey was considered to be a great opportunity to include questions related to when staff became aware of their role local Staff Assembly and what role it could play in the onboarding process. The survey was only sent to campus Staff Assembly groups and committees affiliated with Staff Assembly so that the broad campus communities would not be disrupted with any unwanted solicitations. Ultimately, the respondents were all people who had or have some affiliation with Staff Assembly on their campus during their time of employment.

In addition to the interviews and surveys, other universities were contacted as potential benchmark organizations. University of Colorado, University of Washington, and University of Wisconsin-Madison were initially approached regarding their onboarding process. Two of the organizations were responsive to the work group's requests and provided information that was less than substantive, although future communication has been promised. Finally, objective research regarding the benefits of onboarding was collected to supplement the data and anecdotal information that was gathered from campuses.

III. Research and Findings

1. Benefits of Onboarding

Onboarding has been identified by recruitment experts as an essential component of creating an engaged and effective workforce. Not only can companies lose valuable productivity by their employees not being onboarded effectively, but this also has severe financial effects. The CEB Learning & Development Leadership Council research paper *Implementing and Managing Onboarding Programs* finds that 4% of employees will leave after a “disastrous first day,” costing the organization up to 150% of that employee’s annual salary to re-recruit and hire a new person. This causes losses in employee morale and company productivity, which could encourage others to leave as well. The article also indicates that current workforce trends show declining employee loyalty, so employees spend less time at an organization overall, but employers that are prepared to onboard and train new employees gain a competitive advantage by having employees up and running as quickly as possible. Finally, unengaged workers are less likely to put high levels of effort into their jobs and are more likely to leave; companies can improve employee engagement in excess of 20% by effectively onboarding new employees.

Implementing and Managing Onboarding Programs sums up how an onboarding program can solve these real workplace problems: “A successful onboarding program will motivate new employees, decrease time-to-productivity, reduce new hire turnover, and improve new hire performance. In fact, research suggests that effective onboarding programs can improve an organization’s bottom-line by:

- Improving Employee Performance—Research conducted in 2005 by *The Recruiting Roundtable* reveals that effective onboarding programs can improve employee performance by up to 11.3%.
- Reducing New Hire Turnover—Hunter Douglas found that by upgrading the company’s onboarding process, it was able to reduce new hire turnover from 70% to 16%.
- Heightening Employee Engagement—Research conducted in 2004 by our sister program, *The Corporate Leadership Council*, reveals that effectively onboarding new hires can increase an employee’s discretionary effort in excess of 20%.”

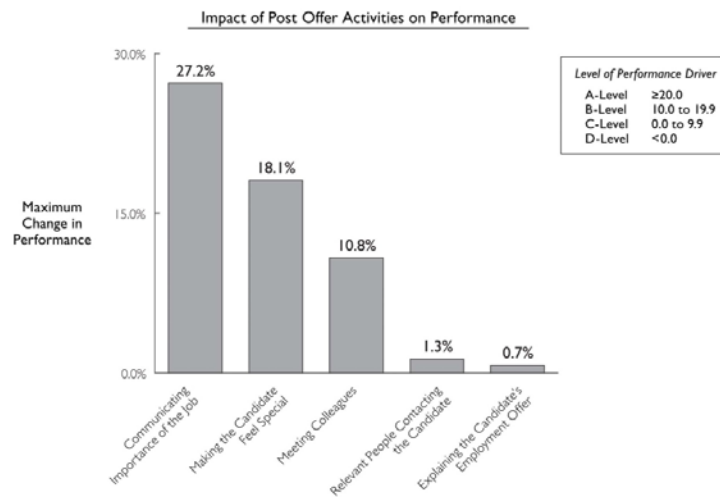
The Leadership Development Council’s paper *Models and Methodologies for On-Boarding Programs* also supports this research. It states that onboarding is “an opportunity to validate [an employee’s] decision to join the organization and pave the way for a productive satisfying relationship.” They profiled companies who create effective onboarding programs, and found their top reasons for doing:

- Retention of employees
- Communication of values and vision
- Consistency of information, message, and experience
- Increased productivity of new hire
- Welcome and integration

The Recruiting Roundtable paper *Maximizing Returns on Recruiting Investments: A Quantitative Analysis of the Drivers of New Hire Performance* shows how the activities that occur after extending an offer to an employee affect that employee's performance. It measures the impact of five activities, all of which are essential in the onboarding process: communicating the importance of the job, making the candidate feel special, meeting colleagues, relevant people contacting the candidate, and explaining the candidate's employment offer. Although the last two activities (relevant people contacting the candidate, and explaining the candidate's employment offer) are the two that are most consistently done on UC Campuses, these only have a 1.3% and .7% impact on employee performance. Communicating the importance of the job and making the candidate feel special, which are areas that are often lacking in current onboarding processes, have a 27.2% and 18.1% impact respectively. While these activities may sound optional and unessential at the outset, they make the largest difference on an employee's job performance.

Post Offer Analysis: Detailed Importance Skyline

Post offer activities help convert the best candidates



© 2006 The Corporate Executive Board Company. All rights reserved.

Source: Recruiting Roundtable, *Maximizing Returns on Recruiting Investments: A Quantitative Analysis of the Drivers of New Hire Performance*, Washington D.C.: Corporate Executive Board 2003, p. 139.

© 2006 Corporate Executive Board. All Rights Reserved.



2. Summary of Campus Contact Interview Responses – By Question

How was the program designed?

Most campuses do not have an onboarding program that was formally designed, but many have online check-sheets and resources. All campuses are strong on the compliance piece of onboarding, but light on community connections. UCB, LBNL, and UCR each use a shared services model for HR recruitment, so the compliance piece of the onboarding process is designed and managed as part of Shared Services. Some campuses used internal or external subject matter experts to design the process. UCD created a work group to examine industry best practices and consulted with subject matter experts. UCLA designed their program at the recommendation of an external consultant, and then designed it internally. UCSD's program was designed by a former CHRO. UCOP's program was also designed internally and an employee with expertise in Share-point designed their onboarding tool to support the process. UC Merced, UCSB, and UCSC have decentralized onboarding fully to the departments.

What role does central HR/the manager play?

At about half of the campuses, new hire paperwork is done centrally (UCB, UCLA, Riverside, UCSC, LBNL, UCOP), and the other half has the manager and hiring unit doing new hire paperwork (UCD, UC Merced, UCSD, UCSB). UCOP has resource managers for the logistics and resources element of onboarding. On all campuses, it is up to the individual units to handle the campus connections beyond the New Employee Orientation.

How was buy-in obtained from managers?

Most campuses do not have a formal program, so formal buy-in was not necessary. Managers were consulted during the development process of the onboarding programs at UCD, UCLA, and Riverside. At UCLA and UCOP, onboarding was positioned as a process to save time. Participation in the onboarding aspects of the hiring process were made mandatory by the shared services model at UCB and LBNL. Due to Health Systems centralized structure, buy-in was obtained from senior-level leadership, then expected of subsequent levels of leadership.

How are managers made aware of this program/checklist?

Managers are made aware of the onboarding programs/checklists on each of the campuses via the campus website, manager/supervisory communication channels, or through central campus services. UCD, Merced, UCSB, and UCSC communicate their resources via their campus websites. UCD, UCLA, and UCSD also communicated their process through manager/supervisory channels.

Communication was not necessary at UCB, Riverside, LBNL, and UCOP because the process is handled by a central entity.

Is participation in onboarding required or optional for new hires?

Inconsistency in what each campus considers "onboarding" makes it difficult to assess how many made it mandatory. Some campuses responded that the process is mandatory, but are only referring to the new-hire paperwork. Others have a more robust program with elements that they consider optional. In general, the onboarding that exists is considered mandatory at UCB, UCLA, Riverside, UCSC, LBNL, UCOP. UCD, Merced, UCSD, and UCSB have onboarding elements that are optional.

How long is the onboarding process applicable to new hires?

The length of onboarding varies from campus to campus. It ranged from the month prior to hire extending all the way to the first year after hire. Most of the campuses (UCSB, UCD, UCR, UCSD, UCB, SA IT) responded that they initiate the process the month prior to the employee starting employment. Several others indicated that the day the employee starts is the day the onboarding begins (UCLA, LBNL, UCOP, UCSC). Four of the campuses (UCLA, UCSD, UCR, & UCD) continue onboarding during the 6-month to a year mark, while only two (UCLA, UCD) indicated that they continue that trend and go beyond the first year, extending past their annual hire date. In addition, two campuses (UCSC & LBNL) indicated that they do not follow up at all with the employee in regards to onboarding past the first day.

Is there a structured timeline or plan for the onboarding process, such as key milestones?

The majority of the responses from the campuses indicate that the majority do utilize a structured tool being either a checklist (UCLA, UCR, UCOP, UCSD, UCB) or a timeline (UCLA, UCR, UCD, UCSD, USB, SA IT) or both to ensure tracking of the onboarding process. These tools allow the campuses to measure and document the actions that are being completed during the onboarding process in order to ensure compliance with UC policy, and state and federal laws. The campuses also can use these to track particular items and make sure that pertinent actions are not forgotten. A few of campuses have no formal onboarding structure and encourage individual departments to address onboarding needs.

How is progress tracked or measured?

Results indicate that there is no universal tracking method across the UC campuses. The current methods vary from campus. The largest trend and most common method was an electronic tool or system in order to house the data (UCB, UCLA,

UCR, UCSD). One of the campuses admitted to not having any measure or method to keep track of any of their onboarding processes (UCSC). Two campuses indicate that the tracking is managed at the department level, in which the departments are responsible for measuring all aspects of progress (UCSD & UCD). LBNL sends out a survey to all new employees during onboarding to gauge their progress. UCOP indicated that they perform monthly meetings between HR and the service provider to track the progress.

What resources do you need to maintain this program?

A handful of locations have staff who are dedicated to the onboarding process, and a few others require IT support to maintain their electronic systems. Other campuses rely on HR's role or have identified inexpensive welcoming methods. To maintain the quality of their program, UCLA Health would like to have continued organizational support for the staff members who are currently responsible for shepherding a new employee through the onboarding process, from formally welcoming them to checking in with the employee six months after hire. UCLA Health, Riverside and UCOP need assistance with managing and maintaining their current systems. UCLA, UCSC, LBNL and UCOP expressed interest in the continued or ongoing support from HR reps. Finally, UCLA Health and UCB stated that a budget is necessary to pay for small expenses, such as collateral supplies and tokens for new employees.

What challenges, if any, are there with maintaining this program?

There were few and no consistent problems across the campuses with maintaining onboarding processes that are currently in place. Issues included less than optimal systems, no dedicated staff, confidentiality, and ensuring quality across departments. UCLA-Health and UCSD's onboarding processes have full organizational support, while UCSC does not currently have a process that requires support. UCB's systems require more manual work than is desired and UCD is challenged because there is not a dedicated system administrator. LBNL, UCOP and UCR's challenges have more to do with hiring managers willingness to adopt improved onboarding practices, including completing the necessary initial paperwork.

What has been the result of implementing this program?

Most campuses stated that the time to fill positions has been reduced and could point to cost savings. Process have been streamlined, are more integrated, and departments are focused on core business matters versus paperwork. UCB, UCLA-Health, and UCOP were each able to document improvements in the time it takes to hire new staff. Advances were made in processing paperwork by UCR, whose

hiring departments are spending less time on it, and UCB, who has experienced improvements in compliance. New employees offered feedback and demonstrated increased knowledge of campus environment and policy at UCSD and LBNL. UCD's onboarding process has proven to be a just-in-time tool for hiring managers.

Based on our preliminary research, we're finding that the onboarding processes typically addresses three key areas for new hires: Logistics and Resources; Compliance and Policy; and Campus Connections. We've found that most processes address the first two areas well and give limited attention to establishing the Campus Connections, which includes helping employees become integrated into the University community and understand their contribution. How does your onboarding process address this particular aspect on engaging new staff members?

Across the system it seems like people are very open to having the Staff Assemblies help with the Onboarding process. The community aspect of onboarding is something the Staff Assemblies can and should take over, since it does not appear that central HR or the departments have the bandwidth to make it a priority.

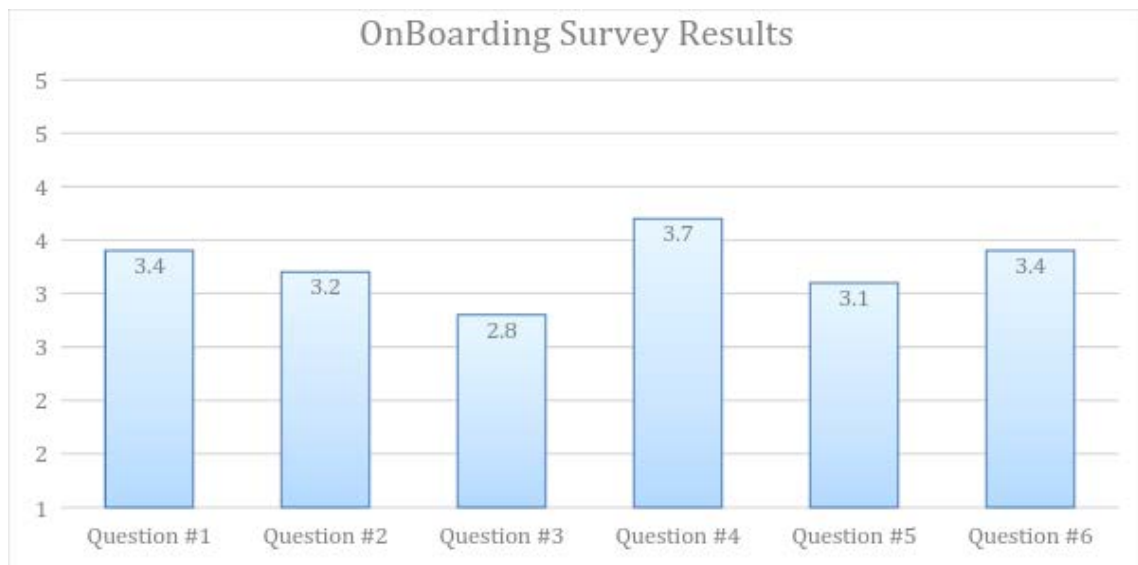
In what ways could Staff Assembly support your efforts in integrating new staff into the campus community?

Suggestions: It would be a great idea for Staff Assembly to support campus connections with new hires in the form of a welcome committee or monthly reception for new hires so that they are aware of how to engage in the campus community. Another idea would be for local assemblies to form a list of people that can "buddy" up with new hires and be there to answer questions and guide the new hire through working in a University environment. It would also be of value to participate on recruitment committees.

3. Onboarding Survey Summary

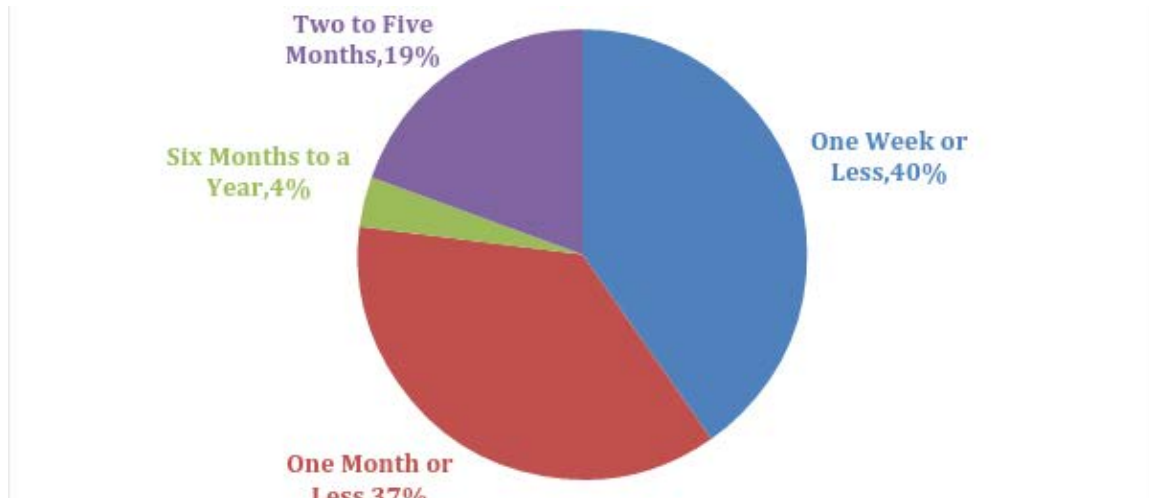
A survey was distributed to campus Staff Assembly groups and committees affiliated with Staff Assembly in order to gather feedback on individual onboarding experiences. One hundred thirty-nine responses were received and all campuses are represented in the following feedback. It should be noted that the survey was distributed to current UC employees, who have maintained a commitment to the organization. The responses of former employees may be quite different depending upon their onboarding experience and reason for leaving the organization.

- Q1. Prior to your first scheduled day on the job, did you feel that you had all the information that you required? This would include start date and time, supervisor and contact information, shift/schedule, parking/commuting information and which documentation to bring your first day.**
- Q2. How satisfied were you with the explanation of UC benefits?**
- Q3. I had a thorough understanding of the University's and or/department's mission and vision statements, structure, and core values early in my employment.**
- Q4. How satisfied were you with the welcome you received from your department?**
- Q5. Do you feel that you were adequately informed on university policies and procedures? (Timekeeping, payroll, days off, vacation, sick, who to contact for certain issues)**
- Q6. Do you feel you had adequate training in order to perform your assigned duties?**



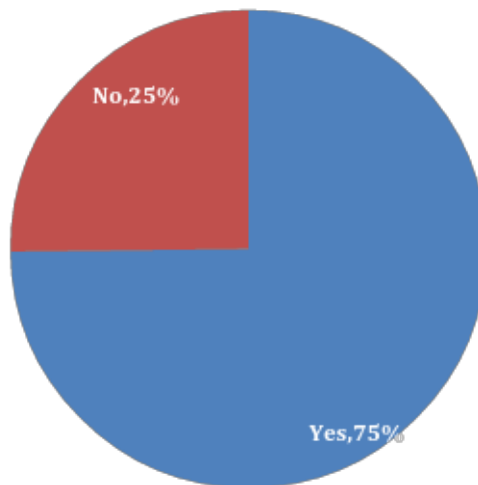
Analysis: Per responses to Q.1 through Q.6, most categories scored above 3 (Meets Expectations), although just barely above it. As a university system that prides itself on excellence, these responses indicate the typical onboarding process is average and an opportunity is being missed to engage staff and help them connect to the organization.

Q.7 How long did it take to get you fully up and running for your Job? (ie. Phone, email, workstation, supplies, etc.)



Analysis: Per survey respondents, 40% were fully settled in within a week and the remaining 60% took more than a week to get up and running. Almost half of that took more than 2 months to get going. This represents wasted hours before some new employees become productive.

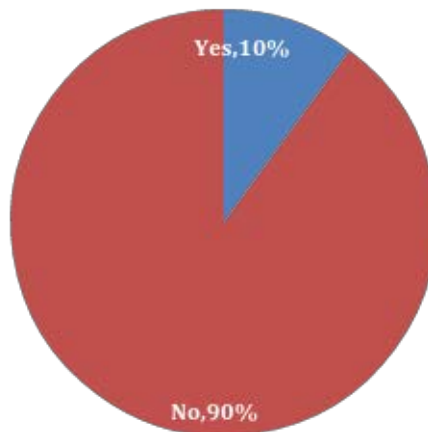
Q.8 Does your supervisor have 1 on 1 meetings or check-ins with you to go over how you are doing? If so how often are those done?



Analysis: One-fourth of the respondents said that their Supervisor did not follow up with 1-on-1 interviews. Even though three-fourths did, there is still a measurable size of the population that did not receive follow-up from the supervisor, which could lead to unengaged employees.

In response to the questions regarding how often supervisors met with the respondents during the new hire process, the vast majority of respondents noted that weekly meetings were conducted. The next most frequent responses were dispersed fairly evenly among bi-weekly meetings, daily meetings and meetings that were scheduled as needed. A small number of staff mentioned meeting on a monthly basis, while one indicated that they only met during the annual performance review.

Q.9 Was your campus Staff Assembly mentioned during your on boarding process?



Analysis: Only 10 percent of the population survey heard about their local staff assembly in the hiring process. Although Staff Assembly plays a part in campuses' onboarding process, their involvement can be improved and, perhaps, information regarding Staff Assembly could be sent to new hires as a follow-up.

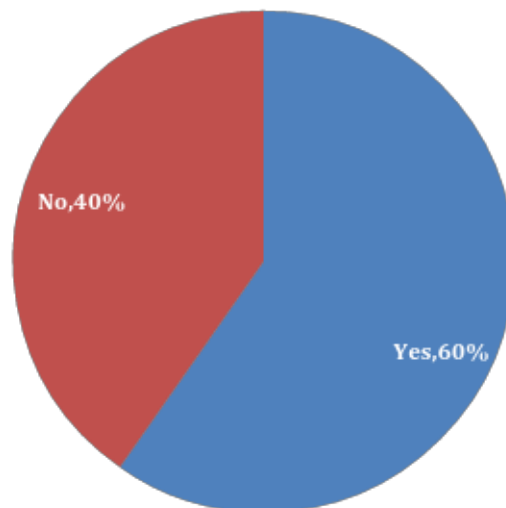
In response to the question on whether Staff Assembly was mentioned during the onboarding process, most respondents noted N/A and the next highest number of responses were that it was not mentioned. According to one respondent, *"I was never told about the staff assembly. Still, I am pretty sure that no one in HR mentions the assembly at onboard."* The next largest grouping of responses indicated that Staff Assembly was mentioned either at new employee orientation, presented at a department meeting or generally mentioned as resource. One staff member said, *"There is an orientation that new staff are invited to attend, and they mention staff assemblies there, but I did not find out about it until after being on campus for 9*

months!!” and another wrote, “I remember it being mentioned but there was so much information given to me I cannot recall specific details.” The final grouping of respondents either didn’t remember whether Staff Assembly was mentioned or were hired before it existed on their campus.

When Staff Assembly was not mentioned during the onboarding process, the large majority of respondents said that a colleague or co-worker informed them about Staff Assembly, for example “After being at UCSB for about 15 years another staff person mentioned it to me.” The next largest group of respondents found out about Staff Assembly by attending an event that they sponsored, “I was searching for professional development on the campus site and located the staff orgs page. I attended staff assembly meetings and was later invited to join the board.”

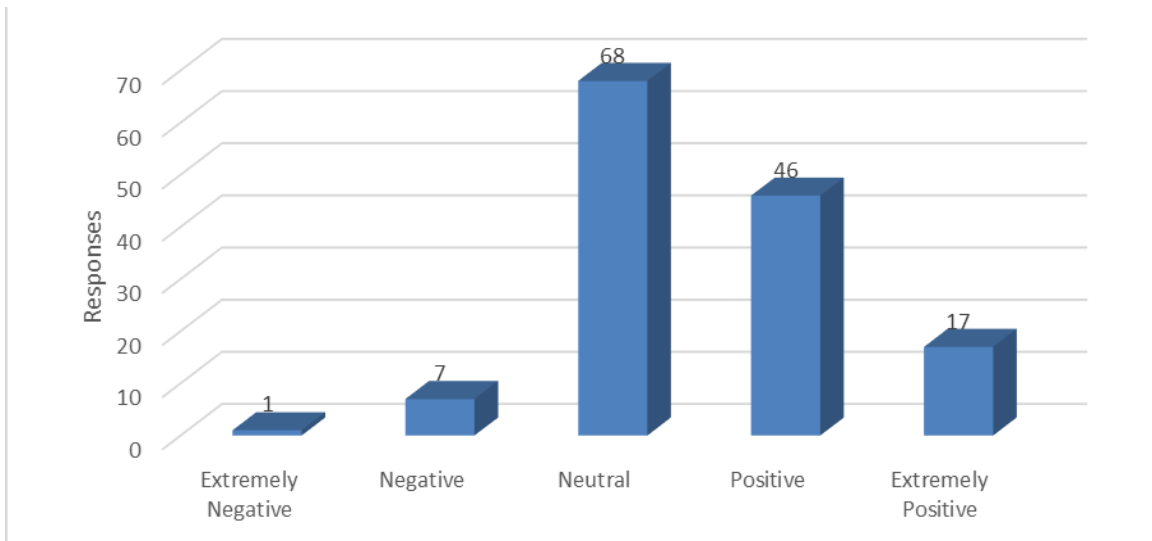
Based on the survey results, it is clear that local Staff Assemblies could be doing more to make their presence known to new employees during the onboarding process, “Contact information for Staff Assembly was included on a spreadsheet, buried in a stack of papers provided at our benefits orientation.” A moderate number of respondents eventually learned about Staff Assembly through a newsletter, email or a local board member. A few respondents indicated that they still don’t know what Staff Assembly is, “I don’t believe it was mentioned at all, and I still am not really sure what a Staff Assembly is...”

Q.10 Would you be willing to speak to new employees during the onboarding process about your campus community and the benefits of working on your campus (where to go, how to get around, how to connect with Staff Assembly and staff orgs, etc.)?



Analysis: More than half the respondents showed interest in speaking with newly hired individuals, showing there are people on the campus still engaged and willing to share their knowledge with new hires

Q.11 How did your onboarding experience affect your feelings towards working for the university?



Analysis: Once again, the overall rating was slightly above average with regards to the onboarding experience. While these responses skewed more toward the positive with regards to how onboarding affected respondents' feelings about working for the university. Responses also indicated that this positive feeling about the organization may be despite the inconsistent onboarding efforts. It also begs the question, "Should the UC system, as a center of excellence in higher education, have an onboarding process that is comparable in excellence vs. simply better than average or the minimum?"

Q12. Additional Comments

The additional comments responses highlighted the key role supervisors and senior leaders play in the onboarding process, onboarding processes that were just "okay," and ideas for strengthening the onboarding experience. Respondents reflected positively on times when their supervisors ensured the department was ready for their arrival and took a hands-on approach to onboarding. In particular, it was noted that 75% of supervisors followed up with their employees via a one on one meeting to ensure that their new hires are well engaged. The involvement of senior leadership proves to be particularly impactful. Per one respondent, "I loved that on

my very first day at UCR, I was given a pin by the Dean of UCRX. It made me feel like I was really a part of the team."

Frequently, Human Resources was identified as responsible for onboarding the survey respondents, particularly through New Employee Orientation. Some expressed that this experience was fine but not great or particularly memorable for those respondents hired many years ago. In some instances, the orientation did not occur until six months after hire and was largely about benefits and basic policies. Some employees took the initiative to create their own onboarding experience, *"...for the most part I had to piece things together on my own. I found it challenging in a positive way."* Others would like to see someone dedicated to helping employees become familiar with their job responsibilities and integrated into the University community.

The onboarding process was generally described as informative and watered down. It was portrayed as not helping to build a sense of community. Some specific suggestions for improvement include adding a mentoring component, sustainability goals and policies, diversity and harassment policy info, and a campus tour. These values-related components, as well as reviewing the mission, vision and goals of the organization were seen as missing. Finally, a couple of respondents expressed strong support for being attentive to the financial planning needs of new employees, *"the best advice I got as a young person beginning my career was to participate in the 403 B program ... I will forever be grateful to the senior staff member who pressed me to begin saving early!"*

A handful of respondents had no onboarding experience, at all. While some weren't aware they were missing anything, others found that it detrimentally impacted their ability to be productive. Internal hires may not get the same attention to onboarding as new employees, *"...in my first position, I didn't have a computer for the first two weeks or so. Once they didn't get me the keys to my office until my third day because they were lost. In all positions but one, there was no training/continuity beyond the basic training/orientation from HR, so large amounts of time were spent figuring out what my predecessor did or reinventing systems to manage my work."*

Q13. Suggestions for how Staff Assembly or staff in general can support the onboarding process.

The most common suggestion from survey respondents was that Staff Assembly could be beneficial during the campus connections element of onboarding. Many people experienced that the onboarding process was only focused on hiring paperwork and did not feel welcomed or connected to the university as a whole. Another common suggestion was for a buddy system, during which a new employee

could be paired with a staff member. One person suggested, *“Existing staff could show new staff around - simple things like best places to eat, to park, to mail a letter, major meeting locations, annual events, or just to go for a drink or coffee. These conversations could lead to best way to make a purchase, get a new ID badge, and a myriad of other useful things...For persons coming from out of town, state, or country - a new location can be very intimidating.”* Another respondent made the point that leadership is so overstretched in their units that it should welcome the assistance from staff assemblies to help welcome a new staff member.

Many mentioned that Staff Assembly was brought up during New Employee Orientation, but also said that it was lost in “information overload.” One person suggested having a follow-up message from the Staff Assembly president, and another suggested *“quarterly emails about the different programs, classes, learning software and tuition discounts should be sent out to all of the staff. Sometimes people need to be reminded of what is available to them.”* The responses reflected that some Staff Assemblies were more successful at participating in new employee orientations than others. While some are included in the NEO presentations, one campus mentioned being limited in their contact to a flyer. Another said, *“Any mention of the existence of a staff assembly on our campus would be a step in the right direction.”* Another person emphasized the importance of Staff Assembly involvement by writing, *“I think it is very important for someone from Staff Assembly to help onboard new staff. At my location, the new employee orientation is all about the technical stuff - benefits, retirement, etc. All that is important but a presentation by Staff Assembly would tell me more about the culture and community of my location.”*

Other notable suggestions were:

- *“Start an onboarding blog, where new employees could post questions and Staff Assembly Board members could answer or ‘invite’ another employee who has expertise in the field to answer the question.”*
- *“If I were Queen for a Day, I would have all new staff members wear a pin or flower (might be costly) but something to let the Campus know that they are a new employee. This way, staff throughout the Campus will recognize the pin/flower and also be welcoming to the new hire. I think that would make a huge difference with regard to a smooth transition.”*
- *“I think it's great that staff receive a messenger bag when they attend the new employee orientation program at UCLA. Tangible items often make a lasting impression ... little things like pens, notepads (with the SA website printed on them!) or a mug go a long way in making a new employee feel welcome.”*

- Assemble best practices for onboarding and distribute to managers and supervisors.
- Hold new employee mixers with existing staff.

A couple of respondents felt that their trouble with onboarding was more about needing training on their jobs, and felt that staff assemblies would not be helpful in the onboarding process.

IV. Workgroup Recommendations and Best Practices

1. Recommendations

Buy In/Integration

- Optimally, senior leadership reinforces the strategic importance of onboarding for retaining talent and reducing recruitment costs, by making the process mandatory.
- Minimally, human resources functions market the onboarding process to all managers and distribute information to hiring managers during the recruitment process.
- Optimally, onboarding responsibilities are clearly defined and accountability is shared amongst stakeholders (Hiring unit/supervisor, HR, Staff Assemblies, etc).
- Minimally, HR and the hiring manager shepherd the onboarding process.
- Optimally, hiring managers are formally trained in the onboarding process and departments have integrated onboarding-related responsibilities into their regular operations.
- Minimally, both hiring managers and new hires have access to an onboarding checklist and other campus-specific resources via a web-based repository.
- Optimally, an overview of the purpose and review of the process for onboarding are part of the orientation of all new supervisors.
- Minimally, onboarding is integrated into ongoing supervisory training programs.

Processes

- Optimally, new hires receive a welcome letter from department leadership and campus-specific welcome token/small gift upon joining the organization and another gift on their anniversary date.
- Minimally, new hires receive a welcome letter from department leadership and congratulatory email from leadership upon their one-year anniversary.
- Optimally, new employees have access to key resources and materials (Examples: computer, phone, office space, badges, passwords, etc) on their 1st day of employment.
- Minimally, new hires have access to key resources within the 1st week on the job.
- Optimally, hiring departments have an onboarding process that includes one-on-one interaction with the supervisor, an assigned department-buddy, and a

general UC contact (HR, Staff Assembly, etc.). All of whom help address employee needs and share organizational expectations/insights.

- Minimally, new hires are required to attend campus' New Employee Orientation, which is an opportunity to energize employees about the UC/campus mission, help them start networking and show concern for their needs.
- Optimally, the onboarding benefits and retirement review process focuses on sustained employment with UC and encourages far-sighted decision-making by new employees.
- Minimally, the benefits and retirement review is scenario-based and easy to follow.

Duration

- Optimally, the onboarding process spans pre-hire to 1 year on the job.
- Minimally, the process lasts from offer acceptance to 3 months on the job.

Tracking

- Optimally, UCOP, centrally, or the individual campuses uses a database to track the onboarding process of new hires.
- Minimally, each campus should have a checklist available for the hiring units to follow that addresses all three crucial aspects of onboarding (compliance, logistics, and connections.) A Best Practices checklist is provided in this document.
- Optimally, new hires are surveyed throughout their first year in order to keep live data of how the onboarding process is being implemented.
- Minimally, new hires are surveyed at the end of their first year.

Local Assembly Participation

- Optimally, campuses utilize their local Staff Assembly in order to provide or reinforce the campus connection.
 - Buddy System
 - Classes
 - Part of new employee orientation
 - New staff welcome event
- Minimally, Staff Assembly is informed of new hires and reaches out to them in order to send information regarding the campus community as well as invite them to join the listserv, if applicable. A draft welcome letter is located in the appendices of this document

Internal Candidate

- Optimally, internal candidates from within or across campuses receive a full onboarding experience that is comparable to that of external hires in attentiveness to compliance, logistics and connections.
- Minimally, hiring managers use an onboarding checklist with internal transfers to identify where there may be gaps and express appreciation for ongoing commitment to the UC system.

Off-Boarding

- Optimally, mandatory off-boarding or exit interviews are conducted to find out exactly why people are leaving and the information is used to improve the onboarding process.
- Minimally, exiting employees are surveyed and the information is periodically reviewed by campuses and reviewed for department trends.

2. Onboarding Best Practices Checklist

The following checklist is a tool for conducting an optimal onboarding process. Various components of the onboarding process address the following key areas:

- *CONNECTION* includes helping employees become integrated into the University community and understand their contribution.
- *COMPLIANCE* includes teaching employees basic legal and policy-related rules and regulations.
- *LOGISTICS AND RESOURCES* include ensuring employees have the information, tools and equipment required to navigate the University and do their jobs.

	Connect	Comply	Logistics
Pre Arrival:			
<input type="checkbox"/> Confirm offer letter sent to new employee either by Human Resources or Hiring Manager	x		x
<input type="checkbox"/> Provide the employee with the New Employee Checklist and job description.	x		x
<input type="checkbox"/> Provide a copy of the unit org chart.	x	x	x
<input type="checkbox"/> Call to officially welcome the new employee after confirmation of acceptance. (welcome letter)	x		x
<input type="checkbox"/> Provide the new employee with a contact in case of questions or issues.	x		x
<input type="checkbox"/> Set up and clean office space.	x		x
<input type="checkbox"/> Schedule the first day and make sure they know what time and where to arrive. Provide a campus map, directions to the location, and parking information/transit information. Provide a temporary parking permit for the first week on the job.	x		x
<input type="checkbox"/> Assign onboarding peer.	x		
<input type="checkbox"/> Schedule introductory meetings with key staff.	x		
<input type="checkbox"/> Send an announcement message to the unit announcing the new hire and start date.	x		x
<input type="checkbox"/> Schedule attendance at the New Employee Orientation and any necessary training classes.	x	x	x
<input type="checkbox"/> Update the unit's internal directory and listservs with the new employee's information.	x		
<input type="checkbox"/> Background check and fingerprinting, if appropriate.		x	

First day:			
<input type="checkbox"/> Documentation			
o Demographic data form, HIPAA and FERPA (if appropriate)		x	
o I-9 , W4, and new employee payroll forms		x	
o Patent Policy Acknowledgment and State Oath		x	
o Benefits packet and information		x	
o Determine needed payroll information		x	
o Submit payroll documentation			
o Campus ID			
<input type="checkbox"/> Tour the workspace and introduce to co-workers. Show where to find:	x		x
o Restrooms	x		x
o Mailrooms	x		x
o Copy centers, printers, and fax machines	x		x
o Kitchen/break rooms	x		x
o Bulletin boards	x		x
o Office supplies	x		x
o Coffee/vending machines	x		x
o Emergency exits and supplies	x		x
o Water fountain	x		x
o Place to hang coat	x		x
o Keys	x		x
<input type="checkbox"/> Workstation	x		x
o Ergonomic Evaluation			
o Computer	x		x
Login	x		x
Email	x		x
Listservs	x		x
Collaboration tools	x		x
Shared drives	x		x
Websites	x		x
Programs used	x		x
o Desk	x		x
Supplies	x		x

Schedule Ergo Evaluation	x		x
Phone and Phone Number	x		x
Voicemail	x		x
Name placard	x		x
<input type="checkbox"/> Explain how to access unit resources:	x	X	
o Meeting room reservations	x	X	x
o Use of meeting room equipment	x	X	x
o How to set up voicemail	x	X	x
o Copy machine access	x	X	x
o Ordering supplies	x	X	x
o Reimbursements	x	X	x
o Sending and receiving mail	x	X	x
o Email listservs and calendars	x	x	x
<input type="checkbox"/> Send introductory email to staff.	x		
<input type="checkbox"/> Distribute information about who to go to for what.	x		x
<input type="checkbox"/> Meet with supervisor to discuss the position.	x		x
o Explain your management style and preferences.	x		
o Review department's mission, vision, strategy, values	x	x	x
o Review department's functions, policies and procedures; job manual or employee handbook, job classification guidelines	x	x	x
o Review organization of the department; departmental staff; directory (phone/email); department calendar	x	x	x
o Review department's confidentiality of information; emergency regulations; dress code	x	x	
o Review initial job assignments and training plans.	x		x
▪ Probation period	x		x
▪ Review	x		x
o Review job schedule, lunch and other breaks, and work hours.	x		x
o Explain out-of-office procedures, holiday schedule, leave accrual, and how to request vacation and sick leave.	x		x
o Explain pay schedule and overtime policy (If applicable.)	x		x
	x		
<input type="checkbox"/> Schedule standing meetings and check-ins.	x		
	x		

First Week:	x		x
<input type="checkbox"/> Arrange welcome lunch for new employee.	x		
<input type="checkbox"/> Order business cards	x		x
<input type="checkbox"/> Update the unit's web site with the new employee's information.	x		x
<input type="checkbox"/> Ask how the first week went and make time to answer questions.	x		
<input type="checkbox"/> Provide list of current department projects and cyclical programs	x		
<input type="checkbox"/> Take a campus tour	x		x
<input type="checkbox"/> Provide public transit, parking, and/or carpooling options	x		x
<input type="checkbox"/> Provide information about Staff Assembly and other staff organizations.	x		x
<input type="checkbox"/> Share where to get coffee and lunch.	x		
<input type="checkbox"/> Provide safety information and how to contact campus police and/or security.	x	x	x
<input type="checkbox"/> How to sign up for training and classes.	x		x
▪ New employee orientation	x		x
▪ Supervisory (if Applicable)	x		
▪ Any job related trainings	x		
<input type="checkbox"/> How to join the gym(s) and other extramural activities, use the library, career center, campus Ombuds, and other campus resources.	x		x
First Month:			
<input type="checkbox"/> Review and clarify performance objectives and expectations after the first month	x		
	x		
Six Months:	x		
<input type="checkbox"/> Review and clarify performance objectives and expectations after the first six months	x		
<input type="checkbox"/> Review progress towards objectives and goals.	x		
	x		
After a year:			
<input type="checkbox"/> Conduct annual performance review	x		
<input type="checkbox"/> Set objectives for the coming year with employee		x	
<input type="checkbox"/> Discuss training completed and training planned for the future		x	

V. Conclusion

When looking at the onboarding process, there are three areas that need to be addressed: connection, compliance and logistics/resources. The onboarding process also needs to last at least one year after initial hire date to ensure the employee is fully developed and has become immersed in the culture. In order for the three areas to be accomplished in the onboarding process, campuses will need help from three key areas; staff human resources, the hiring supervisor/department and the local staff assembly.

By working collaboratively and being attentive to designated areas, each entity plays a critical role in the development of a new hire. HR maintains responsibility for all aspects of compliance from benefits to payroll. The supervisor and hiring unit needs to take on the coordination of logistics and resources from equipment setup to training. Lastly, the local staff assemblies have an opportunity to reinforce the campus connection as this tends to be lost in most onboarding processes. Staff assemblies typically have a network of dedicated passionate workers, who are very willing to share their knowledge with others.

In addition to addressing the three areas of onboarding listed above, campuses need to remain engaged with employees throughout the process. This report includes clear recommendations and a best practice checklist that can be utilized to facilitate the onboarding process, beginning with pre-arrival and ending at one year on the job.

Campuses will need to make a conscious commitment to the importance of these responsibilities. Employees often continue to reflect on their decision to move into a new job or position for days, weeks or even months, after they start work. Each interaction with them is a chance to reinforce the value of the hiring decision and their contribution to the organization. Additionally, recruitment costs and lost productivity due to open positions would be reduced. Ultimately, remaining engaged with an employee will help them feel wanted and appreciated, significantly increasing the likelihood that they will continue to work for UC.

CUCSA ONBOARDING CAMPUS CONTACT INTERVIEW GUIDE

Portion Opening:

I am contacting you as a member of CUCSA's Onboarding Workgroup. We are exploring what campuses are currently doing to facilitate new employees' onboarding experience and would like to determine how CUCSA and local Staff Assemblies can help with the process. Had an opportunity to review your process/checklist/materials and have a few follow-up questions:

Questions:

- How was the program (or checklist) designed?
- What role does HR, department and the direct manager play?
- How was buy-in obtained from managers?
- How are managers made aware of this program/checklist? How is it marketed?
- Is participation in Onboarding required or optional for new hires?

- How long is the onboarding process applicable to new hires? (prior to hire? 6 months to a year after hire?)
- Is there a structured timeline or plan for the onboarding process, such as key milestones?
- How is progress tracked or measured?
- What resources do you need to maintain this program?
- What challenges, if any, are there with maintaining this program?
- What has been the result of implementing this program?

- Based on our preliminary research, we're finding that onboarding processes typically address three key areas for new hires, Logistics and Resources; Compliance and Policy; and Campus Connections. We've found that most processes address the first two areas well and give limited attention to establishing the Campus Connections, which includes helping employees become integrated into the University community and understand their contribution. How does your onboarding process address this particular aspect on engaging new staff members?

- In what ways could Staff Assembly support your efforts in integrating new staff into the campus community?

Closing:

Thank you. We will provide you with an update on our progress and final report.

SUMMARY OF CAMPUS RESPONSES TO INITIAL INTERVIEW QUESTIONS

This is the information we have gathered from the contacts that we were able to reach. There may be more happening on each campus that we did not learn about in these conversations.

UC Berkeley

UC Berkeley has a Shared Services model where the compliance piece of onboarding is handled. Campus Shared Services does the new hire paperwork, benefits counseling and enrollment, timekeeping, and issues the employee ID. All other aspects of onboarding are handled locally at the department level. There is an online "new hire toolkit" with links to campus resources such as campus calendars, things to do on campus, and benefits. There is a new employee orientation held every other month.

Berkeley is planning to launch a new manager onboarding program in Summer 2015. In their offer letters, new managers and the person who hired them will be alerted to the program and encouraged to participate. There will be sessions arranged for them that include an introduction to Berkeley culture, key policies they need to know about, and opportunities for networking. They will also have welcome messages from senior leadership so they begin to put names with faces of the Chancellor and Vice Chancellors.

There is a good example of an effective local onboarding process in the department of Student Affairs IT. In that department, onboarding begins as soon as the department announces that there is an opening. The department assigns an onboarding buddy, and obtains supplies, office access, and sets up their work stations prior to the first day. They welcome the new employee on the first day with flowers, and the onboarding buddy has lunch with the new employee and helps them navigate campus. They use an extensive check sheet that covers logistics, compliance, and the campus connection.

UC Davis

A workgroup from Staff Development and Professional Services gathered information based on best practices in both corporate and educational institutions, current UC Davis practices, resources, and consultations with subject matter experts. After brainstorming and filtering information, a storyline was created to help organize content to be placed on the website in a logical format, taking a new hire from the Introduction/Welcoming/Orientation phase through the first year. Policies, Procedures, Paperwork, Training and Development, and Performance Management were repeating components from the first week through the first year. An inclusive resource list was included and community involvement encouraged.

UC Davis HR's website portal directs people to the "Onboarding Toolkit – Supervisor's Guide" from their Supervisor Resources webpage. HR has several units that provide assistance in onboarding including ELR, Benefits, Compensation and Recruitment. Supervisors and managers are able to use the onboarding toolkit to streamline the

onboarding process and find resources when needed. The Onboarding Toolkit begins with preparation for a new employee's arrival and continues through the first year of employment. The early parts of the onboarding process cover logistics, resources, compliance and policy, but the reason we have the onboarding process is so it spans a full first year and includes the key area of making campus connections.

UC, Santa Barbara (UCSB)

UCSB HR has been conducting a 3-hour in-person NEO on the 1st and 3rd Tuesdays of every month; this presentation serves as a welcome and provides information regarding benefits, ethics and safety. Recruiters identify the next upcoming session and communicate that information to both the selected candidate and the hiring department with the candidate's acceptance of the job offer. Benefits staff will also identify current employees who are newly eligible for full benefits and will invite them to attend the benefits portion of NEO. Beyond NEO, departments have been responsible for onboarding their new employees. HR looks forward to sponsoring/partnering with one of their Gaucho U Certificate Program cohort groups as they research and develop a prototype solution for NEO enhancements and onboarding as their cohort project.

A good example of an effective local onboarding process is in the Student Affairs Division. They have a Separation Checklist for the steps to take when a previous employee separates. They also have an internal New Hire Checklist that includes pre-hire paperwork and arranging logistics and work space prior to the first day of work, compliance elements and campus policy review on the first day, and orientations and a campus tour during the first week.

UCLA

UCLA's onboarding process consists of Campus Human Resources (CHR) conducting new employee orientation (NEO) twice a month and a self-service model that can be accessed via www.chr.ucla.edu. The orientation includes sharing the campus' mission, history and services/perks; as well as policies and benefits. The website includes a "Getting Started" checklist that helps new employees navigate their 1st day at work through the first few months, including encouraging new employees to join UCLA Staff Assembly. Hiring managers are typically made aware of the orientation and website during the recruitment process. However, due to UCLA's size, some managers or new hires do not become aware or attend orientation until months after the hire date. While strongly recommended, participation in NEO is not required, although employees need to make their benefits decision within 30 days of hire. Some of the larger hiring departments have implemented their own specific onboarding process that enable them to focus on helping new employees understanding the function and goals of their area, navigate relevant campus locations and learn job-specific skills. Housing and Hospitality Services and Transportation are two such areas.

UCLA Health

UCLA Health Systems onboarding process was established following input from external consultants, who advised the human resources function to increase the size of the

Recruitment department and improve the onboarding process. Based on this input, the process and a dashboard system were designed internally. Senior leaders approved and made involvement in the onboarding process mandatory. Manager buy-in was obtained by sharing key retention statistics and positioning this new process as freeing up the manager's time. Health Systems-Recruitment has removed tedious duties from hiring managers. An Onboarding Coordinator is responsible for shepherding the process. Managers are charged with establishing the organizational connections.

UCLA Health Systems - Recruitment periodically conducts Onboarding orientations for managers. All hiring is funneled through recruitment, therefore the program does not need to be marketed. Onboarding is required for new hires, as well internal hires. At six months, the recruiter follows up with the hire and, at one year, a handwritten note is sent to him or her. Additionally, managers are provided with a checklist of tasks to complete over course of the year. There is a structured timeline and dashboard to help manage the process. According to UCLA Health Systems, the new onboarding process has resulted in a reduction in days to fill positions and millions of dollars saved over the past year and a half.

UC Irvine

About 10 years ago, UCI had an in person new hire orientation, which included a variety of speakers from across the campus. It was a whole day with a light breakfast that eventually became a half day event. With trainings moving online, the cost of the program, and rumblings from departments about the amount of time their staff were being taken away from the desks gave way to the creation of eNEO. eNeo is an electronic new employee orientation provides basic information about UC Irvine, historical and present day goals, resources, policies and benefits. eNeo is still being used today coupled with an in person Benefits New Hire Orientation. Of course, the new hire orientation is a piece of the Onboarding process, which is currently in the works. The UCI Onboarding process is in the process of being revamped. Info is being collected as to how to reinstate a program that would appease all. There is limited staffing resources and funding, so while onboarding is a critical component of their efforts, it's something that is being worked on but at a slower pace than they would like.

Lawrence Berkeley National Laboratory (LBNL)

LBNL designed a program when the lab went to a shared services model. The point of the system was to keep information about the lab consistent and make sure all new employees get the information needed. HR Does initial training and overview of policies and safety at the lab. Managers and departments are left up to themselves to train and onboard the rest of the way. They have had great success with people learning about the culture of the lab with safety being the top point to get across to new hires. The issue is after the new hire leaves the training by HR the units are left up to their own to finish the onboarding process. There are some units at the lab that have a very elaborate process once the employee is handed off to them, but there are others that do not have anything in place and it is up to the discretion of the supervisor what happens next.

UC Merced

UC Merced does not have a formal program currently. They have a once-a-month NEO that is not mandatory. The department/hiring manager is responsible for all other onboarding activities. Their website does have employee and manager's toolkits with links to forms, new employee resources, and policies.

UC, Office of the President (UCOP)

UCOP's onboarding process was internally developed and an employee with some expertise in SharePoint developed an onboarding tool to support the process. HR Supports the hiring process, such as recruitment, background checks, offer and welcome letters. Hiring managers provide position info, interview candidates and makes verbal offer. Service provider's address space management, equipment, payroll, etc. It took 1 1/2 years for an internal team to develop the program. It was presented to senior leaders and they helped to push it through the organization. Both the statistics and ease of the program, due to HR's heavy involvement, helped to facilitate buy-in. All positions are processed through Recruitment, therefore no marketing is necessary. All managers are expected to participate in the onboarding process and the SharePoint Onboarding Tool helps to track progress. The onboarding process emphasizes the hiring or shepherding the process to the employee's first day. A checklist is currently under development to address the manager's role beyond the first day. There is a structured timeline and expected turnaround time for certain steps in the process. The SharePoint tool is used to track progress. Monthly check-in meetings are conducted between HR and Service providers to discuss progress against metrics. Having the manager's input the initial paperwork in a timely manner can be a challenge, as well as addressing technology-related issues. Time to fill positions is reduced since the metrics are being tracked.

UC, Office of the President (UCOP) System-wide

UCOP Systemwide Talent Management is developing an e-course geared toward supervisors and managers as part of the UC People Management Series. The module being developed in an onboarding course entitled "High Impact Strategic Onboarding: Setting New Hires up for Success" and the key objectives of this course are:

- Equip hiring managers with an understanding of the importance of strategic onboarding (High impact onboarding)
- Explain the link between talent acquisition and talent integration of a new hire
- Understanding the pitfall of turnover and loss of employee engagement
- Taking a proactive view with the new hire on performance management

UC Riverside

UCR does not have a central onboarding system in place as their HR department is decentralized and each department is responsible for taking care of their own new hires themselves. It was noted that UCR Business Shared services unit does a very thorough job of onboarding. They have a checklist that they follow and they manage the transactional aspects of the onboarding experience, while they let the hiring

department's focus on the rest. The checklist is sent to the home department and moves through the process with the employee and employee file. Onboarding starts prior to hire and the timeline begins on the hire date. The Shared services unit has a case management tool that tracks the onboarding request which ensures visibility into the workflow, routing and approval process. Their focus is primarily on compliance and policy, as it relates to payroll. They support logistics/resources and campus connections by providing the new hire with information on UCR Staff Orientation as well as how to access At Your Service for benefits information. The department and Central HR provide direct support in these areas. The UCR School of Medicine is currently in the process of developing an online onboarding system.

UC Santa Cruz

HR has a 1 - 2 hour long onboarding process where the person will sign and go over paperwork. The rest is left up to the hiring department in order to do the rest. HR also created Checklist in order to help out units on what they needed to be responsible for. The main issue with this is that most units and supervisors are unaware that the checklist are available. The checklist are good for some basics, but do not touch on the community aspect and the new employee immersing themselves into University culture. Some units on the campus have very elaborate onboarding processes, but others do not leaving the onboarding for new Santa Cruz employees very inconsistent across the campus.

UC San Diego

UC San Diego has an excellent website called BLINK where their new employees can begin their onboarding experience. They have an onboarding tool kit that begins with preparation for a new employee's arrival and continues through the first year of employment. Human Resources and department managers play dual roles where they have Payroll/HR/Dept. supervisor checklists to ensure compliance. Employees find out about the onboarding program during new employee orientation. All managers learn about the onboarding program and their role with it at the new employee orientation. It was noted that UCSD thinks that they could improve on their program as they obtain feedback from the new employees and know that things could be better if they had specific resources to improve them.

UC, San Francisco (UCSF)

At UCSF, Onboarding is owned by HR. This included activities such as; paperwork; badges; door access, timesheet set-up, directory updates, required training on LMS, etc., Campus Orientation, owned by Human Resources and referring to activities intended to introduce all hires to common vision, values, goals, amenities, and some training, is currently on hold. Department training, which is the responsibility of the hiring manager or department, is variable.

2015 CUCSA ONBOARDING SURVEY

[Opening Statement]

Welcome and thank you for agreeing to participate in the 2015 CUCSA Onboarding Survey. It should take approximately 5 - 10 minutes to complete.

This short survey will help Council of University of California Staff Assemblies (CUCSA) recommend general onboarding best practices and clarify the role that local Staff Assemblies could play in helping to engage new employees. For purposes of this survey, onboarding consists of pre-hire practices, addressing compliance issues, logistics and resources required, and establishing a community connection.

As you complete the survey, please consider the first position you held as a new hire on a UC campus. Your responses will be kept anonymous. We appreciate your candid feedback..

[Demographic data]

Date first hired: (month and year)

Campus:

Department (optional):

[Rating Scale Questions + "Space" to comment/explain their rating after each question.]

For questions 1 through 6, please answer on a 5 point scale with 5 meaning "above and beyond," 3 meaning "met expectations," and 1 meaning "did not receive."

Q. 1 Prior to your first scheduled day on the job, did you feel that you had all the information that you required? This would include start date and time, supervisor and contact information, shift/schedule, parking/commuting information and which documentation to bring your first day.

Q.2 How satisfied were you with the explanation of UC benefits?

Q.3 I had a thorough understanding of the University's and or/department's mission and vision statements, structure, and core values early in my employment.

Q.4 How satisfied were you with the welcome you received from your department?

Q.5 Do you feel that you were adequately informed on university policies and procedures? (Timekeeping, payroll, days off, vacation, sick, who to contact for certain issues)

Q.6 Do you feel you had adequate training in order to perform your assigned duties?

[Forced Response Questions]

Q.7 How long did it take to get you fully up and running for your Job? (ie. Phone, email, workstation, supplies, etc.)

- One week or less
- One month or less
- Two to Five Months
- Six months to a year
- One year or greater

Q.8 Did your supervisor have 1 on 1 meetings or check-ins with you to go over how you are doing? If so how often are those done?

- Yes
- No

Q.9 Was your campus Staff Assembly mentioned during your on boarding process?

- If yes, what was presented to you?
- If no, when and how did you first learn about your Staff Assembly?

Q.10 Would you be willing to speak to new employees during the onboarding process about your campus community and the benefits of working on your campus (where to go, how to get around, how to connect with Staff Assembly and staff orgs, etc.)?

- Yes
- No

Q.11 How did your onboarding experience affect your feelings about working for the university?

- Extremely Positive
- Positive
- Neutral/No Change
- Negative
- Extremely Negative

[Open-Ended Responses]

Q.12 Additional Comments:

A. Please provide additional comments about your onboarding experience:

B. Please offer suggestions for how staff assembly or staff in general can support the onboarding process:

[Closing Statement]

Thank you for your time and valuable contributions.

Please click the **Submit Survey** button below in order for your responses to be recorded.

ONBOARDING CHECKLIST

Critical, equally important components of onboarding:

- *CONNECTION* includes helping employees become integrated into the University community and understand their contribution.
- *COMPLIANCE* includes teaching employees basic legal and policy-related rules and regulations.
- *LOGISTICS AND RESOURCES* include ensuring employees have the information, tools and equipment required to navigate the University and do their jobs.

	Connect	Comply	Logistics
Pre Arrival:			
<input type="checkbox"/> Confirm offer letter sent to new employee either by Human Resources or Hiring Manager	x		x
<input type="checkbox"/> Provide the employee with the New Employee Checklist and job description.	x		x
<input type="checkbox"/> Provide a copy of the unit org chart.	x	x	x
<input type="checkbox"/> Call to officially welcome the new employee after confirmation of acceptance. (welcome letter)	x		x
<input type="checkbox"/> Provide the new employee with a contact in case of questions or issues.	x		x
<input type="checkbox"/> Set up and clean office space.	x		x
<input type="checkbox"/> Schedule the first day and make sure they know what time and where to arrive. Provide a campus map, directions to the location, and parking information/transit information. Provide a temporary parking permit for the first week on the job.	x		x
<input type="checkbox"/> Assign onboarding peer.	x		
<input type="checkbox"/> Schedule introductory meetings with key staff.	x		
<input type="checkbox"/> Send an announcement message to the unit announcing the new hire and start date.	x		x
<input type="checkbox"/> Schedule attendance at the New Employee Orientation and any necessary training classes.	x	x	x
<input type="checkbox"/> Update the unit's internal directory and listservs with the new employee's information.	x		
<input type="checkbox"/> Background check and fingerprinting, if appropriate.		x	
First day:			
<input type="checkbox"/> Documentation			
<input type="radio"/> Demographic data form, HIPAA and FERPA (if appropriate)		x	
<input type="radio"/> I-9 , W4, and new employee payroll forms		x	
<input type="radio"/> Patent Policy Acknowledgment and State Oath		x	

o Benefits packet and information		x	
o Determine needed payroll information		x	
o Submit payroll documentation			
o Campus ID			
<input type="checkbox"/> Tour the workspace and introduce to co-workers. Show where to find:	x		x
o Restrooms	x		x
o Mailrooms	x		x
o Copy centers, printers, and fax machines	x		x
o Kitchen/break rooms	x		x
o Bulletin boards	x		x
o Office supplies	x		x
o Coffee/vending machines	x		x
o Emergency exits and supplies	x		x
o Water fountain	x		x
o Place to hang coat	x		x
o Keys	x		x
<input type="checkbox"/> Workstation	x		x
o Ergonomic Evaluation			
o Computer	x		x
Login	x		x
Email	x		x
Listservs	x		x
Collaboration tools	x		x
Shared drives	x		x
Websites	x		x
Programs used	x		x
o Desk	x		x
Supplies	x		x
Schedule Ergo Evaluation	x		x
Phone and Phone Number	x		x
Voicemail	x		x
Name placard	x		x
<input type="checkbox"/> Explain how to access unit resources:	x	X	
o Meeting room reservations	x	X	x

o Use of meeting room equipment	x	X	x
o How to set up voicemail	x	X	x
o Copy machine access	x	X	x
o Ordering supplies	x	X	x
o Reimbursements	x	X	x
o Sending and receiving mail	x	X	x
o Email listservs and calendars	x	x	x
<input type="checkbox"/> Send introductory email to staff.	x		
<input type="checkbox"/> Distribute information about who to go to for what.	x		x
<input type="checkbox"/> Meet with supervisor to discuss the position.	x		x
o Explain your management style and preferences.	x		
o Review department's mission, vision, strategy, values	x	x	x
o Review department's functions, policies and procedures; job manual or employee handbook, job classification guidelines	x	x	x
o Review organization of the department; departmental staff; directory (phone/email); department calendar	x	x	x
o Review department's confidentiality of information; emergency regulations; dress code	x	x	
o Review initial job assignments and training plans.	x		x
▪ Probation period	x		x
▪ Review	x		x
o Review job schedule, lunch and other breaks, and work hours.	x		x
o Explain out-of-office procedures, holiday schedule, leave accrual, and how to request vacation and sick leave.	x		x
o Explain pay schedule and overtime policy (If applicable.)	x		x
<input type="checkbox"/> Schedule standing meetings and check-ins.	x		
First Week:	x		x
<input type="checkbox"/> Arrange welcome lunch for new employee.	x		
<input type="checkbox"/> Order business cards	x		x
<input type="checkbox"/> Update the unit's web site with the new employee's information.	x		x
<input type="checkbox"/> Ask how the first week went and make time to answer questions.	x		
<input type="checkbox"/> Provide list of current department projects and cyclical programs	x		

<input type="checkbox"/> Take a campus tour	x		x
<input type="checkbox"/> Provide public transit, parking, and/or carpooling options	x		x
<input type="checkbox"/> Provide information about Staff Assembly and other staff organizations.	x		x
<input type="checkbox"/> Share where to get coffee and lunch.	x		
<input type="checkbox"/> Provide safety information and how to contact campus police and/or security.	x	x	x
<input type="checkbox"/> How to sign up for training and classes.	x		x
▪ New employee orientation	x		x
▪ Supervisory (if Applicable)	x		
▪ Any job related trainings	x		
<input type="checkbox"/> How to join the gym(s) and other extramural activities, use the library, career center, campus Ombuds, and other campus resources.	x		x
First Month:			
<input type="checkbox"/> Review and clarify performance objectives and expectations after the first month	x		
	x		
Six Months:	x		
<input type="checkbox"/> Review and clarify performance objectives and expectations after the first six months	x		
<input type="checkbox"/> Review progress towards objectives and goals.	x		
After a year:			
<input type="checkbox"/> Conduct annual performance review	x		
<input type="checkbox"/> Set objectives for the coming year with employee		x	
<input type="checkbox"/> Discuss training completed and training planned for the future		x	

SAMPLE STAFF ASSEMBLY WELCOME LETTER

CAMPUS OR ASSEMBLY LETTERHEAD

Dear (new hire's name),

Welcome to (campus)! My name is (name) and I am the chair of our local Staff Assembly board. We thank you for choosing to work for (campus) and becoming a part of our campus community. There are many great benefits to working at this university and being a part of the University of California System. As a (campus) employee, you are a member of Staff Assembly and we hope to help you discover those benefits.

The purpose of our Staff Assembly is to enhance the functioning of the University of California, (campus), by promoting the interests and welfare of all staff career employees as allowed by law and, in cooperation or coordination with the Office of the Chancellor, to provide support of the campuses' mission. Our vision is to help staff stay engaged (informed, involved, connected and recognized), both internally and system-wide, by coordinating events such as the following:

- Picnic
- Forums
- Breakfasts
- Lunches
- Staff Appreciation Week

For additional information, please contact us via email (email address), visit our website (link to website), "Like" us on (Facebook or Linked In), or sign up for our listserv (link to listserv).

Warm Regards,

Staff Assembly Chair Signature

Staff Assembly

Campus

WORKS CITED

Implementing and Managing Onboarding Programs. Research Brief. CEB Learning & Development Leadership Council, June 2006. Web.
<<https://ldr.executiveboard.com/>>.

Maximizing Returns on Recruiting Investments. Recruiting Teleconference Materials. Recruitment Roundtable, CEB Corporate Leadership Council, Nov. 2006. Web.
<<https://clc.executiveboard.com/>>.

Models and Methodologies for On-Boarding Programs. Research Brief. CEB Corporate Leadership Council, Oct. 2003. Web. <<https://clc.executiveboard.com/>>.