UWM FAA Onboarding Guide

Pathway to Panther Pride
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Supervisor’s Role
The supervisor is the most influential person in the onboarding process and is key to the successful integration of new employees into the organization. It is the supervisor’s role to work side-by-side with their new staff members (along with their Teammate) until they learn the ropes and establish credibility within the organization. The supervisor should help the new employee thrive during the critical transition period and their efforts will pay off. Finding good employees is too difficult—and too expensive—to let one go without a fight. It is the supervisor’s duty to understand the onboarding process and clarify expectations up front. The supervisor should not assume that qualifications equal success. Just because a new employee is qualified does not mean they will easily take on their new role, every new employee will have strengths, but also room for improvement. The supervisor needs to make themselves readily available for the new employee during the onboarding process.

As the hiring leader, the supervisor is the most influential person in the onboarding process. They are the link that integrates new employees into the organization.
Pathway to Panther Pride

Overview

**Purpose**
This guide has been developed for supervisors to support an effective and successful onboarding process for new employees. As a supervisor, it is your privilege and responsibility to welcome your new employees to UW-Milwaukee and to introduce them to the culture and values of your area.

The orientation process begins with your first phone call to the new employee and follows with your meeting on their first day. But a new employee’s initial impression of their job extends far beyond that first contact. What transpires after the first day is referred to as the onboarding experience. The onboarding experience offers a better strategic approach for your new employee’s success and provides them with a better sense of the University and its culture.

To assist you in understanding the importance and process of onboarding, Finance and Administrative Affairs (FAA) has created the UWM FAA Onboarding Guide.

**Principles**
The six guiding principles of the UWM FAA Onboarding Program are:

1. **Engage New Employees Early and Often**
   - As soon as a new employee is hired, and even before their official first day, connect the new employee to UWM.

2. **Provide Structure and Resources for Year-Long Onboarding**
   - Onboarding new employees into our organization is a process, not a one-time event.

3. **Establish and Support the Leaders’ Critical Role**
   - The relationship between the employee and the manager is one of the most significant in an employee’s work life. Orientation at the department level is the most important part of the onboarding process. When leaders take time to meet frequently with new employees to guide their integration and discuss issues, that person’s productivity and retention is higher. A thorough and thoughtful onboarding process is the foundation for employee engagement and success.

4. **Deliver the Most Important Information First**
   - Employees need to know what impacts them individually and feel secure on a personal level before they can look to the needs of the organization. The onboarding process must identify and address those individual needs.

5. **Facilitate the Process of Socialization**
   - Connection to other new employees, other team members, and key customers and partners is a critical piece of the onboarding process.

6. **Provide Early Exposure to Leadership**
   - A positive and motivating message is sent to new employees when a campus leader takes the time to speak to them – it helps strengthen the connection to UWM.

**Roles and Responsibilities**

**Supervisor**
The supervisor actively participates in the New Employee’s first days, weeks, and months to provide a successful launch. It’s important that the Supervisor provides them with the foundational information, tools, resources, positive interactions, and organizational perspective that aids rapid acclimation to our culture.
Research continues to demonstrate that the relationship between supervisor and employee is a critical factor in retention, performance, and employee engagement. If Supervisors can quickly develop a high-quality relationship with the New Employee, it can impact first-year retention, increase productivity, and build commitment. Supervisors need to be engaged and present throughout the onboarding process.

**FAA Onboarding Coordinator**
The FAA Onboarding Coordinator plays a critical role in the successful onboarding of new hires. In many cases, they will be one of the first points of contact for new employees. It is important that the Supervisor works closely with the FAA Onboarding Coordinator to ensure a positive onboarding experience for all new employees.

The FAA Onboarding Coordinator is responsible for helping the Supervisor create an onboarding plan, which will help you accomplish the tasks within the different phases of onboarding: Preparation, Orientation, Integration, and Engagement.

**Onboarding Teammate**
The teammate serves as an additional resource to the new employee, providing the opportunity to better understand departmental culture, mission, and goals. Teammates help foster an environment in which people work together and assist one another in their effort to build a strong team and department.

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**What is the Teammate Agreement?**
The onboarding Teammate Agreement matches new employees with experienced staff members for their first few months of employment. This relationship is intended to:
- Provide the new employee with a point of contact for general inquiries regarding day to day issues.
- Foster a comfortable relationship in which the new employee can access someone who is familiar with the university, culture, norms, and expectations of the division.

**Selecting a Teammate**
When selecting a Teammate, he or she should:
- Have a personal presence that will impress and persuade the new employee that they are someone who can be trusted
- Possess good communication and people skills
- Support and demonstrate commitment to the university’s vision and values
- Be an effective source of advice and encouragement
- Have been employed more than one year
- Be familiar with the new hire’s role and responsibilities

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**Teammate’s Role**
In addition to being a direct point of contact, an element of the onboarding teammate’s responsibility is to help establish a sense of belonging for the new employee. With an effective onboarding teammate, a new employee will quickly become a contributing member of FAA. To help accomplish this quick growth, the teammate’s responsibilities are:
- Act as an informational resource for the new employee on policies, procedures, work rules, norms, etc.
- Help socialize and involve the new employee in workplace activities
- Assist with instruction and training
- Act as an “office tour guide”
- Identify resources and explain important details about the workplace, university culture, and organization
- Introduce the new employee to other staff members

It is important to remember that an onboarding teammate is not the new employee’s supervisor. If questions arise regarding performance or policy matters the onboarding teammate will direct the new employee to their supervisor.
**Onboarding Stages**

**Preparation**
Pre-arrival and acclimation to work environment and most relevant teams.

**Orientation**
Benefits and other campus and departmental orientation activities.

**Integration**
Gaining job knowledge, connecting to FAA Strategic Plan, and Campus & Departmental goals.

**Engagement**
Connecting to Division and University; Building relationships and establishing goals; Governance understanding and involvement.

**Monitoring**
Measuring the effectiveness of the Onboarding Program and the progress of new employees.

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**Orientation vs. Onboarding**

Orientation is an event; onboarding is a process.

Orientation is a structured event that focuses on the information the new employee needs to know to get started, such as an introduction to the organizational structure, policies, and procedures. It is one piece of the onboarding process.

Onboarding can last anywhere from 3 months to a year, depending on the responsibilities of the position and the amount of organizational understanding necessary to be successful in the role. The goal is to align new employees with UWM’s culture, mission, and values, and focuses on strengthening the employees’ connection to the University, Division, and the people. It provides a more strategic plan for employee success than orientation alone.
## Timeline of Activities

### PREPARATION

**<WEEK 1**
- Supervisor prepares workspace for new employee prior to their arrival
- The offer letter is sent, employment paperwork is completed, and the new employee’s UWM identity is created by the Onboarding Coordinator
- The Supervisor and Onboarding Coordinator develop an Onboarding Plan for the new employee
- A Teammate is assigned to the new employee by their Supervisor
- A Welcome Toolkit will be sent to the New Employee by the Supervisor prior to their first day
- Employee will be given access to the correct systems by Supervisor

### ORIENTATION

- The New Employee will receive a Welcome email from the Vice Chancellor and Associate Vice Chancellor
- Prior to the start date the Supervisor will send an email announcement about the New employee to their department

**DAY 1**
- The Supervisor and Teammate will introduce the new employee to their team and take them to coffee/lunch
- A campus tour will be given to the New Employee by their teammate
- F&AHR will give the New Employee a brief orientation
- The New Employee will be given access to Information Security Training that needs to be completed within their first week

**WEEK 1-4**
- New Employee completes Benefits Orientation within first 30 days of employment
- The New Employee and Teammate will go through an office equipment orientation
- The Supervisor will introduce the New Employee to their work groups, teams and key customers and partners
- New Employee job and safety training will be completed by the Supervisor
- The Teammate and Supervisor will give the New Employee information on different campus services
- Both the Supervisor and Onboarding Coordinator will complete check-ins with the New Employee
- The Onboarding Coordinator will complete Check-in Questionnaires with the Supervisor and Teammate

### INTEGRATION

**MONTHS 2-6**
- The New Employee and Supervisor will complete 3 and 5 month evaluations
- The New Employee will be welcome at Friday Affairs
- Objectives between the Supervisor and Onboarding Coordinator will be completed for the upcoming year
- Both the Supervisor and Onboarding Coordinator will complete check-ins with the New Employee
- The Onboarding Coordinator will complete Check-In Questionnaires with the Supervisor and Teammate

### ENGAGEMENT

**MONTHS 3-12**
- Governance information will be given and explained to the New Employee by the Onboarding coordinator
- An interest survey will be given to the employee so the Onboarding Coordinator and Supervisor can better connect them to the department, position and interests
- The New Employee and Supervisor will continue to participate in career path planning

### MONITOR

- The Onboarding Coordinator will continue to monitor and measure the effectiveness of the Onboarding Program with the Supervisor, Teammate and New Employee.
Preparation

There are many things that need to be done prior to the new employee’s arrival. It is critical to plan in advance, so they can “hit the ground running.” It is vital that the new employee’s work space, onboarding plan, and first week agenda are completed by their supervisor before their arrival. The Supervisor will send the New Employee an email before their first day with details on their first week and to make them feel welcomed. During the Preparation Stage, it is important for the Supervisor to do whatever they can to make the New Employee feel welcomed before they even begin.

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<td>Complete Employment Paperwork</td>
<td>Supervisor</td>
<td>Welcome email &amp; offer letter</td>
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<td>New Employee Spotlight</td>
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<td>HR Checklists and Forms</td>
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<td>Receive UITS notification</td>
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<td>Develop Onboarding Plan</td>
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<td>Assign Onboarding Teammate</td>
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<td>Request Access to Systems</td>
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<td>Prepare Job Information</td>
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<td>Onboarding plan worksheet questionnaire</td>
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Resources & Tools

- **Workstation Checklist**: a fillable PDF that allows the supervisor to document when they complete necessary tasks to ensure the New Employee’s workstation is ready before their arrival
- **Welcome Email & Offer Letter**: a letter or email that comes from the Onboarding Coordinator, consisting of the New Employee’s offer letter, New Employee Spotlight, and hiring paperwork. The Onboarding Coordinator will use the HR Checklist to ensure the New Employee is completing the necessary paperwork.
- **New Employee Spotlight**: a fillable PDF that is sent with the Welcome Email & Offer letter. The form gives the New Employee a chance to tell their Supervisor a little more about themselves, and the Supervisor will use it at a later date to send an announcement to the department with information about the New Employee
- **Onboarding Plan Worksheet Questionnaire**: a worksheet the Supervisor and Onboarding Coordinator will complete together to aid in creating the Onboarding plan
- **Week 1 Agenda Template**: a template the Supervisor can use to help assist in planning the New Employee’s first week of work. This form will aid the Supervisor and Onboarding Coordinator when completing the Onboarding plan worksheet
- **Onboarding Plan**: a customizable plan the Supervisor and Onboarding Coordinator will complete together to create a specific onboarding program for each New Employee
- **Onboarding Teammate Guidelines**: a list of expectations for Supervisors to review when picking a Teammate for their New Employee
- **Welcome Letter**: a letter or email coming directly from the Supervisor to the New Employee welcoming them to the University and department, giving them a brief description of the department, and where to report on their first day
Orientation

The Supervisor is responsible for introducing the New Employee to their team, and for ensuring the New Employee is aware of all University and departmental work rules, vision, and values. At this time performance expectations should be clearly laid out, meaningful work should be assigned, and training should be provided. It is beneficial to hold weekly check-ins during this time to ensure the New Employee is becoming acclimated to their new position.

### Resources & Tools

- **Welcome Email from VC and AVC**: an email sent from the Vice Chancellor and Associate Vice Chancellor welcoming the New Employee to their new position
- **Email Announcement Template**: an email sent from the Supervisor to the department briefly introducing the New Employee and what they’ll be doing. The Supervisor will use the New Employee Spotlight to introduce the employee more personally to the department.
- **HR Orientation Outline**: a checklist used by the Onboarding Coordinator during their orientation with the employee to make sure all policies and procedures are covered.
- **Campus Services Information Outline**: an outline used by the Supervisor to assist in acquainting the New Employee with the University
- **Supervisor/Employee, HR/Employee, Supervisor Check-in**: forms used by the Supervisor and Onboarding Coordinator to help facilitate check-ins throughout the onboarding process
Integration

During this stage the employee continues to gain knowledge and make connections to the FAA Strategic Plan. The New Employee should be aware of and committed to the University and departmental work rules. It is the Supervisor and Onboarding Coordinator’s job to monitor performance and provide feedback during this time, and obtain any feedback from the New Employee.

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<td>Supervisor/Employee Check-in</td>
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<td>Six Month Celebration</td>
<td>Division-wide bi-annual event</td>
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**Resources & Tools**

- **Supervisor PD Review Guide and Checklist**: a checklist for the Supervisor to use while reviewing the New Employee’s PD to ensure that the New Employee is performing the duties laid out in the PD
- **Manager Performance Evaluation Guide and Checklist**: a guide for Supervisors to assist them in giving the New Employee Evaluations
- **Teammate Check-in**: form used by the Onboarding Coordinator to help facilitate check-ins throughout the onboarding process
Engagement

During the Engagement stage the New Employee will begin to connect to the Division and University, building new relationships and establishing goals. It is important that the Supervisor continues to keep the new Employee engaged by providing opportunities for participation and training. The Supervisor and New Employee should continue to conduct Career Path planning to ensure the employee sees the value they bring in their current position and a path for continued growth and contribution.

### Resources & Tools

- **Interest Survey for Governance Participation**: a survey given to the New Employee to better connect them to a Governance group that interests them if they wish to be involved
- **Governance Summary Document**: a brief summary of the Governance groups at the University, for the Supervisor to give to the New Employee
- **Interest Survey**: a survey given to the New Employee to better connect them with projects, teams, and interest within their job
- **Goal Setting Template**: used by the Supervisor to aid a discussion with the New Employee in regards to setting new goals and reviewing past goals
6-Month Celebration

As an additional welcome to new employees to the Finance & Administrative Affairs team, a special celebration will be held to recognize those who were recently hired. New employees who have reached 6 months of employment will be invited to attend an event to celebrate the milestone.

Details

The 6-month celebration is one of many ways that we can introduce new employees to the UWM culture and Finance & Administrative Affairs. More importantly, it shows the supervisor’s dedication to the success of their new employees and helps to reinforce the employee’s decision to work for UWM.

- The celebration may coincide with biannual Friday Affairs gatherings
- Supervisors should encourage attendance and attend along with their new employees
- New employees in attendance will be publicly recognized and others will be encouraged to join in celebrating this important milestone