What is Onboarding?
- Getting your newly hired staff or faculty member up to speed with the policies, processes, culture, expectations, and day-to-day responsibilities of their job and your department.
- Making new employees feel welcome and excited, confirming why they joined your department and the University of Richmond.

Why is Onboarding Important?
- Builds UR’s and your department's reputation for being a great employer with excellent training, clear leadership, and a strong organization.
- Helps to retain your employees.
- Reduces high turnover costs.
- Quickly gets new employees to efficient productivity levels.
- Builds a cohesive team, thereby raising everyone’s productivity.

Prior to Day 1
- Make sure that adequate space, equipment, supplies, etc. are available.
- University Property: complete and sign the Property Assignment Form and file in department personnel file (list all property distributed; property may include laptop or desk computers, cellular phones, iPads or other electronic devices, tools, emergency kits, etc.).
- Develop a training plan for the new team member (what tasks/skills need to be learned, who will teach them and when will they be taught). Identify significant milestones for learning.
  - NEO I
  - NEO II
  - FERPA (online)
  - Cyber Security (online)
  - Title IX (Instructor led)
  - Title IX & Harassment (online)
  - CSA (online)
  - Other Department Training:
    - ____________________________
    - ____________________________
    - ____________________________
    - ____________________________
  - Plan the Day 1 schedule (tour of the department, introduction to other department members, lunch with department members, one-on-one meeting with you to discuss performance expectations, etc.).
  - If the employee is attending the New Employee Orientation on his/her first day, make sure they are aware of where to go when it ends at 4:00 p.m.
  - Managers should have lunch with the New Hire on their New Employee Orientation Day.
- Make sure the employee has access to necessary databases, email, phone, etc.
Inform your team of the new employee’s start date.

Send a “Welcome” email to the new employee. Consider including some or all of the following:
- Location to report to and who to ask for upon arrival.
- Day 1 schedule and expectations.
- What to wear/bring (dress code or supplies/tools), if applicable.
- Attach relevant introductory materials (e.g., acronym list, lunch options list, organization chart).

Day 1
- Be available to greet your new employee after they complete their HR processing if NEO is not on their first day.
- Confirm that the new employee has completed all the necessary forms in HR, such as the I-9 and tax forms.
- Describe your department by explaining its name, purpose, position within the division and/or school, staffing, and any special departmental rules or procedures. Provide handouts as appropriate.
- Review administrative procedures:
  - Office/Desk work station
  - Keys
  - Mail (incoming and outgoing)
  - Shipping (FedEx, DHL and UPS)
  - Business Cards
  - Purchase Requests
  - Telephones
  - Building Access Cards
  - Conference Rooms
  - Picture ID Badges
  - Expense Reports
  - Office Supplies
  - Travel Processes
- Discuss the new employee’s job duties and responsibilities. Be sure to point out the importance of the job to the department and/or school and the need to work as part of the department’s team.
- Explain the work schedule of the department and of the new employee.
- Make sure the employee knows the payday schedule.
- At the end of the day, meet with the new employee to discuss the first day on the job. Ask questions and discuss concerns. Since new employees are sometimes reluctant to ask questions, you may need to encourage them.
- Tell the new employee about any specific department orientation programs.
- Tour of facility including: restrooms, mail rooms, copy centers, fax machines, bulletin board, parking, printers, office supplies, kitchen, coffee/vending machine, cafeteria, emergency exists and supplies.

Days 2-10
- Discuss job expectations and your personal expectations with the new employee.
- Explain that the introductory period is a time to learn as much as possible about the new job and that you are available to provide assistance. Identify others in the department who also can help and ask
them to do so. Encourage your new employee to ask questions about the job, department, and university.

- Provide the employee with a list of key contacts and people to meet within their first few months.
- Direct the employee to the Staff Policies and/or Faculty Handbook for information on specific University guidelines.
- Discuss the importance of interacting courteously and effectively with other employees, students, and UR community.
- Be proactive about managing the new employee’s training and development. Create and discuss performance feedback goals with the new employee and submit them on UR Talent Web (for staff employees). Give your new team member positive reinforcement for tasks or responsibilities that have been performed well.
- Review how to track and approve leave time (for Staff employees).
- Make sure the new employee is receiving relevant University communications (i.e. department newsletters, etc.) Encourage the new employee to take advantage of available resources (UR e-Learning (for staff employees), employee wellness, transportation, insurance, etc.

**First 90 Days**

- Continue to document performance feedback in UR Talent Web (for staff employees).
- Regularly meet with your new team member to review his or her performance. Acknowledge strengths and good work as well as coach or counsel to support and encourage improvement.
- Elicit and discuss questions or concerns.
- Ask the new employee if there are learning and professional development opportunities of interest to him or her. Discuss and determine which opportunities may be appropriate.
- Ensure that any required compliance training is scheduled or completed.
- Keep encouraging your new team member to get involved with the UR community. Suggest that they talk to other employees about campus groups, publications, and other professional activities and resources that are available and might be of interest.
- Have a 90 day check-in conversation with the employee to gauge their learning, answer questions, and provide any needed resources.