

CSU The California State University SYSTEMWIDE HUMAN RESOURCES



THE CSU MANAGER'S GUIDE TO ONBOARDING **NEW EMPLOYEES**

Congratulations on successfully hiring a new member of your team!

This is an exciting time for you and your new employee who may be feeling apprehensive as well as eager - to make meaningful contributions to your team.

New employees need to feel valued, engaged and connected. It's critical that their first experiences are positive, so they feel confident about their decision to join the CSU.

Research by the Aberdeen Group found that 86% of new-hires decide whether to stay during the first six months of employment. As you know, it can be time-consuming and expensive to replace employees who leave. SHRM estimates the cost to be 250% of the person's salary plus benefits!

In contrast, it's hard to put a price on the benefits of ensuring that new employees feel welcomed and supported. Research from Gallup and SHRM shows that engaged employees - who feel they belong and know that they're valued – show higher engagement and productivity.

This handbook offers a thoughtful, organized onboarding plan to help you support your new employee's introduction to the team, and to demonstrate your investment in their career at the CSU.

We hope you find this handbook useful! If you have suggestions, please contact us at: <u>L&D@calstate.edu</u>.



ONBOARDING AND ORIENTATION. WHAT IS THE DIFFERENCE?

Orientation is a one-time event to welcome new-hires to the organization. It's an opportunity to review key resources important to a new employee. Often, it is also used as a time to address administrative procedures or mandatory paperwork. Though important, these activities do not generally offer a warm welcome to the organization's purpose or culture.

Onboarding is a series of events designed to help new-hires acclimate to a new organization and position over time. It requires a strategic plan to successfully immerse new-hires in the workplace and support their positive integration into a new team and environment. As onboarding progresses, new employees develop a deeper understanding of their role and responsibilities, where to find answers and how to make a positive impact through their work.

CSU COMPETENCIES

The CSU's competencies exemplify the characteristics and actions of professional behavior at the CSU.

CORE COMPETENCIES (all employees)

Accountability: Plans and prioritizes work to meet deadlines and outcomes; provides clear direction and delegates as needed; clearly communicates roles, expectations and timelines; monitors work to ensure goals and deadlines are consistently met; executes work to quality standards.

Communication: Communicates effectively with all audiences, both verbally and in writing; actively listens to others and incorporates new knowledge or perspectives into thinking; uses knowledge sharing to ensure that others have access to the information needed to work effectively; encourages open exchange of ideas and different points of view; communicates the truth with empathy, even when it is challenging or uncomfortable; solicits and values honest input.

Inclusiveness: Promotes the engagement, development, and equitable treatment of all staff; demonstrates awareness of and respect for individual differences; supports, through action and example, equal treatment and opportunity for all; actively engages the rich background and diverse talents of staff to propel the organization forward; speaks out against words or actions that are insensitive or inconsistent with the organization's mission and values.

Integrity: Acts professionally when interacting with others; treats all with dignity, respect and fairness; honors commitments to others and models and maintains high ethical standards; is responsive to other staff; earns trust through consistent alignment of words and actions.

LEADERSHIP COMPETENCIES

Mission-Oriented: Develops priorities for areas of responsibility; formulates and implements effective strategies that are aligned with the organization's mission, values and priorities; demonstrates a personal commitment to student success and the organization as a whole.

Strategic Thinking and Alignment: Understands market, industry and environmental trends; addresses issues to create or sustain competitive advantage; uncovers new opportunities to create value and leverage the organization's strengths; anticipates change and develops long-term plans.

Team Building: Creates a work environment where people feel cared for and valued; fosters collaboration and team effectiveness; works cooperatively and effectively with others to achieve common goals; participates in building a group identity characterized by pride, trust and commitment.

HOW TO USE THIS HANDBOOK

This onboarding handbook will help you and your new employee navigate the next few months when there's so much to learn and absorb. It contains best practices, tips and activities for you to provide a well-planned and encouraging introduction to the CSU – one that ensures your new team member feels welcome and supported.

Tasks are organized into daily, weekly and monthly plans. Use these to familiarize your new-hire with their position and department, introduce them to new colleagues, gain access to the resources they will need as a new employee, and help them understand their role in supporting the CSU mission. Feel free to modify suggestions to best meet the needs of your team! And remember to consult with your department, division and campus procedures.

~ Alexander Graham Bell

BEFORE DAY ONE

Remember: An hour of planning can save 10 hours of doing! Take the time to consider your goals when onboarding a new employee. Then map out the steps needed to achieve a positive and meaningful onboarding experience.

Your Goal: Get yourself organized so you can provide your new employee with a smooth, stress-free and supportive onboarding experience.

WHAT	RECOMMENDATIONS	WHO
Send a welcome email to the new employee.	 Suggestions on what to include in the welcome email: Share how pleased you are to have them on the team. Confirm their start date, and the time and location where they should report on their first day. Include details of whom they'll meet, any applicable dress codes or required paperwork. Include a campus map, and instructions on where to park (highlighted), any parking fees, etc. Outline expectations and any required documentation they should bring for completing their new employee paperwork. Provide a primary contact person for any questions or assistance in their first week. Include a first week agenda, so they know what to expect. 	New employee's direct supervisor.
Send new employee notification out to wider team, including new employee in the message.	 Suggestions on what to include in the notification email: Share your enthusiasm of adding a new member to your team. Include the employee's start date, name, position title and department, email/phone number, and where they'll be located. Encourage the team to introduce themselves and welcome the new employee to the organization. 	New employee's direct supervisor.
VC/VP/Dean leaves a voicemail or writes a card to welcome them and wish them luck in their new job.	 The voicemail from leadership may include: Welcome to the team/organization. Express appreciation for their interest in the position, joining the organization and affirm they have made the right choice. Share brief statement of values, goals and/or mission and how they will contribute to achieving these together. 	New employee's direct supervisor requests VC/VP/Dean to leave a voicemail or write a card.
Order required job equipment and ensure it's assigned to new employee.	• Familiarize yourself with the employee's desk/work area to ensure they have everything they'll need to effectively transition into their new role. For example: building/desk keys, office supplies, job tools (pens, ruler, scissors, calculator), personal protective equipment, etc.	New employee's direct supervisor or delegated as appropriate to support personnel.
Order any personalized identifying items and technology.	 Name plate for cubicle/walls, business cards. Name badges or IDs (unless handled during first day). Customized uniforms. Computer/laptop, monitor(s), keyboard/mouse, desk phone. 	New employee's direct supervisor or delegated as appropriate to support personnel.

WHAT	RECOMMENDATIONS	WHO	
Prepare new employee's work area/desk.	 Clean surfaces and organize the area, including any drawers, cabinets (ensure old materials not needed are disposed of). Arrange supplies and equipment. Ensure phone, monitor(s), etc. are available. Consider ways to create a welcoming environment, such as customized name plate, plant, artwork or a gift bag. 	New employee's direct supervisor or delegated as appropriate to support personnel/ facilities.	
Request/verify new employee's access to relevant knowledge sharing systems.	 Listservs, websites, shared network drive(s). Campus portal, intranet or mobile apps, group chats/channels. Information systems. Team, department and division meetings/communications. 	New employee's direct supervisor or delegated as appropriate to support personnel.	
Identify mandatory and time-sensitive compliance training required in the first few weeks.	 Identify and confirm the <u>mandatory training</u> your new employee should complete in the first few months. Consult the job description for details. Schedule time on calendar to complete training as appropriate. 	New employee's direct supervisor.	
Assign an onboarding buddy (if possible).	 A fellow employee who is well-versed in the culture and work of your team/division/organization would be an ideal buddy. This person can offer advice and guidance for the transition. While neither a job coach nor a trainer, a buddy serves as a confidential colleague and advocate, assisting with insight and support of staff, management and organizational culture. 	New employee's direct supervisor. See onboarding buddy content on <u>page 12</u> .	
Prepare the new employee's schedule for their first week.	 The first week's schedule should include: Mandatory or standard start and end, lunch and break times. 1:1 meetings with direct supervisor (sample questions). 1:1 meeting with their onboarding buddy. 1:1 meetings with team members and unit leadership. A 'Welcome Social' with the team. Any mandatory new employee orientations, meetings and paperwork with other departments (e.g. payroll, ID badge, keys, parking/transportation). Free time daily for employee to review, organize and process new employee information. RECOMMENDATIONS Avoid overscheduling the first day. Invite the new employee to lunch or beverage break on first day. Include a tour of the department, building and relevant buildings, eateries and recreation areas on campus. 	New employee's direct supervisor or delegated as appropriate to support personnel.	
Reserve time on your calendar each day.	 Suggest allowing time at both the beginning and end of your day, for formal and informal check-ins. 	New employee's direct supervisor.	
Inform colleagues meet-and-greets will be scheduled once new employee begins their new job.	 successfully collaborate with as part of their role. Scheduled once new apployee begins their Consider providing example questions for the new employee to ask during their meet-and-greet sessions. 		

Two things remain irretrievable: time and a first impression. ~ Cynthia Ozick

FIRST DAY

Remember: Today is all about introductions and first impressions. Show your new employee how pleased you are that they joined your team and assure them they have made the right choice.

Your Goal: Make sure your new employee feels welcomed, comfortable and supported today.

WHAT	RECOMMENDATIONS	WHO
Greet your new employee upon their arrival.	 Don't be late! Plan to arrive at least five minutes early so you will be there to welcome them as soon as they arrive. Don't be rushed! Allocate more time than you think you'll need to ensure your new employee gets settled in comfortably. Inquire about your new employee as a person. How is your morning going? Did you find parking OK? How are you feeling about this transition? Remind them you're available to help them, and how they can best contact you with any questions. Inform your new employee that you will be in daily contact for the first couple weeks, and then on a weekly (or other) basis. When appropriate, provide the new employee some quiet time to get settled into their new desk and work area. REMEMBER: The first day can be quite overwhelming. Take the time to check how your new employee is doing.	New employee's direct supervisor.
Give them a warm welcome: a plant, card, sign, campus-branded swag and a first-day tour of the office or campus.	 Consider offering a card signed by the team or small gift to welcome your new employee. Branded campus swag is a great way to help them feel a part of the organization and instill campus/CSU pride. Decorating the new employee's desk or work area with a banner or other festive items shares team spirit and gets the other employees involved in welcoming the new employee. 	New employee's direct supervisor or delegated as appropriate to support personnel.
Demonstrate you're ready for them by having all office equipment and materials ready.	 Provide a quick tour of their workspace and make sure they're able to log into their computer, use and access any equipment they may need (such as phone, printers, supplies, etc.). 	New employee's direct supervisor or delegated as appropriate to support personnel.
Invite immediate and extended team members to welcome new employee.	• Send a message to team members reminding them of the new employee's first day, and their role in the organization. Ask them to stop by to introduce themselves, and explain how they'll work with the new employee.	New employee's direct supervisor.

WHAT	RECOMMENDATIONS	WHO
Provide a list of key contacts and helpful reference materials.	 Consider providing copies of helpful reference materials, such as phone lists, organizational charts, campus maps and key support departments (like IT). For email addresses and websites, digital formats (with hyperlinks) may be more helpful and easier to access. Briefly review each with the new employee. 	New employee's direct supervisor or delegated as appropriate to support personnel.
Provide a schedule of their first week on the job.	 Review this with your new employee. Explain the relevance behind specific meetings and activities. Ask the new employee if they have any additional meeting or activity suggestions to include in their first week. Identify the tasks or meetings you plan to attend with them, and which ones they will attend by themselves. 	New employee's direct supervisor or delegated as appropriate to support personnel.
Provide the <i>Getting to Know You</i> questionnaire.	 The <i>Getting to Know You</i> questionnaire is provided at the end of the handbook (page 13). Provide deadlines for completing the questionnaire (suggest by the end of the first week). 	New employee's direct supervisor or delegated as appropriate to support personnel.
Introduce onboarding buddy to new employee.	 Provide time for them to get acquainted. 	Onboarding buddy.
Provide a welcome tour. This is a great activity to do with their onboarding buddy.	 Include a tour of their immediate work area, surrounding department, division and campus. Introduce new employees to colleagues and key personnel during the tour. Provide campus map, and instructions on how to access it online or use the campus app on their mobile device. Identify restrooms, emergency exits, fire extinguishers, first-aid stations, breakrooms (water, coffee), supply area, etc. Highlight relevant buildings, eateries and recreation areas. 	New employee's direct supervisor, onboarding buddy or new employee tour.
Take your new employee to lunch on their first day.	 Consider inviting your new employee out to lunch or for a beverage break, or have a department potluck. Make sure to accommodate any dietary needs/preferences. 	New employee's direct supervisor.
Assign the <u>CSU Onboarding</u> course.	 Explain they should pace themselves as it will take time to assimilate the information, new job and environment. Plan to discuss the course and review what they've learned in your regularly scheduled 1:1 meetings. Suggested discussion questions are at the end of this handbook. 	
Meet with the new employee at the end of the day.	nployee at the end • Ask open-ended questions, such as:	



FIRST WEEK

Remember: Recognize your new employee will need time for meeting and getting to know people. Reassure them that while there's a lot to learn, they're supported and you want them to be successful, so it's important to ask questions or for help so they're not overwhelmed.

Your Goal: Be available to your new employee, and check in with them periodically to answer questions or proactively provide encouragement and support. Talk with them daily for the first couple of weeks and have 1:1 sessions.

WHAT	RECOMMENDATIONS	WHO
Give them something meaningful to accomplish immediately.	 Look for short-term "wins" that are well within the grasp of the new employee. Assign a task that requires low technical and institutional knowledge, but will have meaningful impact for the team. Provide encouragement and praise and connect work back to your organizational goals. Affirm you look forward to future opportunities that will further allow the employee to demonstrate their skills and value. 	New employee's direct supervisor.
Review goals and expectations at 30/60/90 days.	 This should include performance reviews and any seasonal or high-priority projects to be completed in this time frame. Be clear on timing of deliverables and projects, so your new employee understands individual and team priorities. This will ensure they don't feel compelled to learn everything at once. 	New employee's direct supervisor.
Hold first 1:1 meeting.	 Establish 1:1 format. Stress to them it's their time with you. Review department culture including mission statement, values, strategic plan, goals and any unspoken rules. Inquire about what they learned/remembered from the CSU Onboarding course. See suggested Discussion Questions on page 14. Ask what they need from you to ensure a successful transition into their new role. 	New employee's direct supervisor.
Familiarize with department communications and knowledge sharing technology.	 Examples of technology include: email, chat/messaging, voicemail, network drives, VPN, campus portal/intranet, website(s), submitting timesheet, payroll/benefits information, newsletters. Provide ample time, both individually and with onboarding buddy, for new employee to explore various websites, portals, network drives/files and email servers. 	New employee's direct supervisor or delegated as appropriate to support personnel.

WHAT	RECOMMENDATIONS	WHO
Discuss best practices for confidentiality and security.	 Examples include: Turning papers face down on desk. Locking buildings, offices and computer workstations. Data classification standards/procedures to ensure secure information. Procedures for notifying supervisor about absences or in case of emergencies. Determine how the supervisor can contact the employee in case of emergency. Reporting their hours and time off (vacation/sick). 	New employee's direct supervisor or delegated as appropriate to support personnel.
Review the department/ college/university administration information, policies and procedures.	 Provide reference/source information such as hard copies, websites/intranets, as well as regular communications such as emails, newsletters, etc. 	New employee's direct supervisor or delegated as appropriate to support personnel.



FIRST MONTH

Remember: Champion your new employee's ideas and skills. Recognize their performance and successes according to their personal preferences. Make sure they know you value their initial accomplishments, and see the potential they have for future, more substantive long-term contributions.

Your Goal: Demonstrate you're a reliable and trustworthy supervisor invested in your employee's growth and success in their new role. Show your support as they transition to becoming a fully-contributing member of the team. Do NOT skip your 1:1 meetings!

WHAT	RECOMMENDATIONS	WHO
Review 30-day expectations.		New employee's direct supervisor.
Take your new employee to lunch or a beverage break.	 Ask them what's going well and what they need to thrive. Acknowledge and remind them of what skills and contributions they've already brought to the team and your work. 	New employee's direct supervisor.
Remind your new employee to submit required, time-sensitive benefits information.	 Identify what information must be submitted in the first 30 to 60 days of their employment. Inquire if they have any questions regarding benefits and connect them to the appropriate personnel for support. 	New employee's direct supervisor.
Review ancillary benefits and direct them to appropriate resources.	 Examples of ancillary benefits include: employee discounts/ tickets, local community discounts, voluntary benefits such as legal, EAP, pet insurance, etc. Verify if your campus has a web page detailing these discounts, services and/or benefits, and share these with the new employee. 	New employee's direct supervisor or delegated as appropriate to support personnel.
Begin individual development planning.	 Establish expectations for professional development (Systemwide Learning & Development recommends three hours monthly). Review campus employee development tools and <u>CSU Learn</u>. Visit the Systemwide Learning & Development <u>website</u> as well as your campus Learning & Development website. 	New employee's direct supervisor.
Meet with the new employee daily to check in and answer questions.	 Alternate between supervisor and onboarding buddy to ask the new employee how they're doing, whether they're in need of assistance with anything, etc. 	New employee's direct supervisor and onboarding buddy.
Schedule time at the end of each month for questions.	 See <u>conversation starters</u> for more suggestions. 	New employee's direct supervisor.



MONTH ONE

- 1. How does the job compare to your expectations?
- 2. What could we do to make you feel more welcome?
- 3. What have you found most helpful so far?
- 4. Who do you talk to when you have questions about work?
- 5. Do you feel comfortable asking questions?
- 6. Who has been the most helpful in training and welcoming you to the office?
- 7. Do you have the tools and equipment you need to do your job? If not, what is missing?
- 8. Is there anything you wish you'd known or had on day one?
- 9. Reference the <u>Getting To Know You</u> questionnaire to learn more about the new employee.

MONTH THREE AND BEYOND

- 1. What do you feel has been going well?
- 2. Do you have enough, too much, or too little time to do your assigned work?
- 3. How do you see your job relating to the organization's overall mission?
- 4. What do you need to learn in order to improve your skills /your functional and/or organizational knowledge?
- 5. How can I help you become more successful in your job?
- 6. Is there any professional development you're interested in or would like to explore for your advancement?

STARTERS

The following are some suggested topics and questions for direct supervisor's 1:1 discussions with their new employees. They're organized by time period, but can be used however they work best for you in your 1:1 employee meetings.

MONTHTWO

- 1. Do you believe your ideas are valued?
- 2. How would you describe your workload?
- 3. Are there any changes you would suggest for our team?
- 4. Is there something we should be providing that we're not?
- 5. What would you like to share with me that I have not asked you?
- Is there anything you don't understand about your responsibilities / our department / our campus / the CSU?
- Compare the organization to what we originally explained it would be like to work here. Do you feel the description was accurate? What did we miss?

STAY INTERVIEW

- 1. What do you look forward to when you come to work each day?
- 2. What are you learning here?
- 3. What would you like to learn more about?
- 4. What is it about working here that is special for you?
- 5. When was the last time you thought about leaving our team? What prompted it?
- 6. Why do you stay here?
- 7. What can I do to make work better and more fulfilling for you?

ONBOARDING BUDDIES

Onboarding buddies are a wonderful asset to new employees who may need a reliable, go-to person for when they have questions. This is especially important if you're not available. The buddy can provide encouragement, information and support to help your new team member get acclimated. At the CSU, onboarding buddies should be MPPs or Confidentials. Buddies can be partnered with represented or non-represented new-hires. Be sure to agree on a time frame with the onboarding buddy. Depending on your availability and your department's complexity, you might need the buddy's support for a few months, or even up to a year.

When selecting an onboarding buddy, it's important to identify someone who is:

- Friendly and approachable.
- A good communicator.
- Positive and supportive.
- Well-versed in campus or departmental norms.
- Able to introduce your new employee to others.

Buddy Expectations

- Meet with the new employee within the first few days.
- Establish that you're available to answer questions via phone/text/email (specify medium and any parameters).
- Introduce the new employee to colleagues around campus.
- Follow up with them weekly for the first two or three months.
- Thereafter, meet monthly to have coffee or lunch or just check-in.
- Respect confidentiality.







Print the following page for your employee so they can share some personal preferences. Other team members might also like to share their likes and dislikes.

We Want To Get To Know You!

THE BASICS ABOUT YOU

Your Name

Nickname

Pronouns

Start Date

Birthday (month/day only)

WHICH DO YOU PREFER - THIS OR THAT?

____ Coffee ____ Comedy ____ Tea ____ Drama/Horror

Television

___ Books

____ Cats

- ____ Mac
- ____ Beach
- ____ Pizza
- ____ Muffins
- ____ Sweet
- Road Trip
- Have A Plan
- ____ Sports Text

- ____ Dogs
- ____ PC
- ____ Mountains
 - ____ Tacos
 - ____ Bagels
 - ____ Savory
 - ____ Flying
 - ____ Go With The Flow
 - ____ Arts
 - ____ Phone Call

TELL US ABOUT A FEW OF YOUR FAVORITE THINGS

Quote	 	
Movie(s)	 	
TV Show(s)	 	
Author or Book	 	
Place to Visit	 	
Weekend Activity	 	
Hobbies	 	
Sweets/Treats	 	
Ice Cream Flavor(s)	 	
Snacks/Chips	 	
Type of Food	 	
Music Artist/Genre	 	
Sports/Teams	 	
Color	 	

CSU ONBOARDING COURSE DISCUSSION QUESTIONS

The CSU Onboarding course is packed with great information about the CSU's mission and its importance to the state of California.

It's unlikely your new employee will remember everything they read in the course! But it can be helpful to have a few questions ready so you can have a productive chat about what they've discovered. It's also a great opportunity for you to provide more detail and expand on information provided in the course.

- 1. How many campuses make up the CSU system? Can you name a few?
- 2. Do you remember any fun facts about the different campuses?
- 3. Did you get a chance to review any of the Graduation Initiative 2025 data? If not, take this opportunity to explore the <u>GI 2025 website</u> and review the information together.
- 4. How many people sit on the Board of Trustees? Do you remember how often they meet?
- 5. Roughly what percentage of CSU employees are represented by bargaining units?
- 6. Did you get a chance to explore the professional development section? Be sure to remind your new employee there are countless development opportunities available from the campus Learning & Development team, as well as the Systemwide Learning & Development team.
- Have you explored any information resources? E.g., <u>CSYou</u> (the systemwide intranet site), <u>CSU News</u> or the <u>CSU Resource Center</u>?

Here are a few other resources to help your new employee learn more about the CSU:

• <u>About the CSU</u>

(its mission, history, leadership and alumni)

- <u>CSU Fact Book</u>
- <u>CSU Data Insights</u>
- CSU Employee Profile

A Great Place To Work





This guide was developed for CSU supervisors to provide helpful information in support of new employee onboarding efforts. Our valued employees make the CSU an outstanding system of higher education and a great place to work! And it all starts on day one — by providing a working environment where employees feel valued, acknowledged and supported in their professional careers.



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