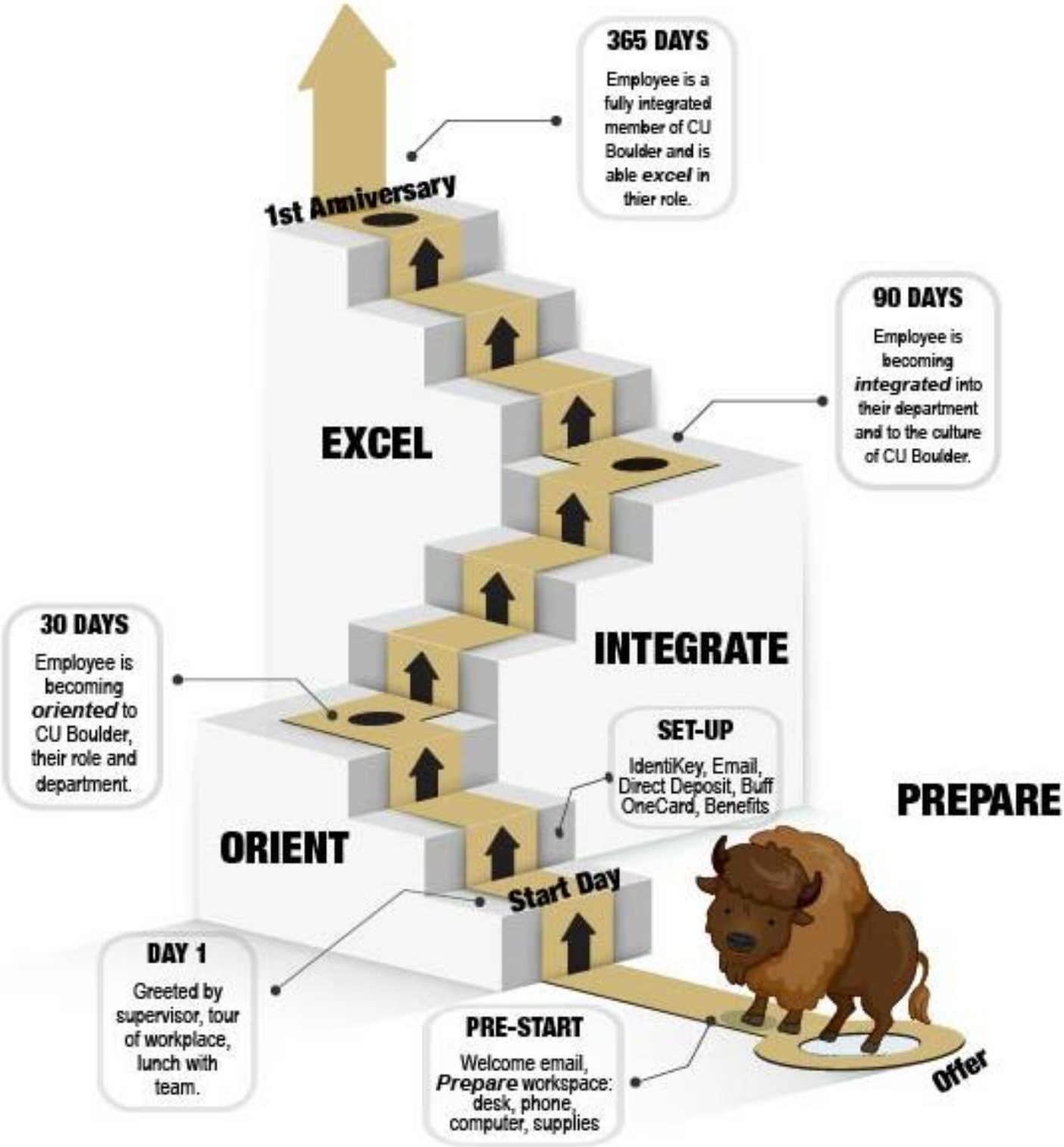
# CU BOULDER'S COMPREHENSIVE ONBOARDING MODEL




Human Resources
UNIVERSITY OF COLORADO **BOULDER**

Sponsored by:

Katherine Erwin, Senior Associate Vice Chancellor

and

Chief HR Officer

Informational guide created by Christiane Harrison, MS, Onboarding Manager under the direction of Dr. Merna Jacobsen, PhD., Associate Vice Chancellor, Deputy Chief HR Officer and Director of the Office of Organization and Employee Development, CU Boulder Department of Human Resources

[1] *Successful Onboarding: Strategies to Unlock Hidden Value within Your Organization* McGraw-Hill publishing 2010. The book was developed around the principles of The Onboarding Margin ™, a concept and set of frameworks developed by Kaiser Consultants over the course of several years of best practice research and client work in the space.

**Contact Information:**

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565 UCB
Boulder, CO 80309
**NewAtCU@colorado.edu**

# Onboarding for New Hires

This informational guide will help you:

- ✓ Understand the purpose of onboarding
- ✓ Understand CU Boulder's three-tiered approach
- ✓ Distinguish between onboarding, orientation, and set-up
- ✓ Introduce onboarding resources and tools provided by HR

Use this and the online onboarding resources to develop an onboarding plan for your new hires.

## Definition of Onboarding

Onboarding is the *process* by which new hires become *fully integrated members* of the institution.

## Purpose of Onboarding

The purpose of onboarding is to help new hires reach *higher levels of productivity faster*.

## Onboarding Outcomes

- ✓ Faster time-to-productivity
- ✓ Increased retention rates
- ✓ Higher levels of career satisfaction
- ✓ Lowered levels of stress

# CU Boulder Onboarding Model

CU Boulder's onboarding model is a comprehensive approach involving all levels of the institution. The three-tiered model is research based and incorporates programs, tools and resources with the goal of moving newcomers to higher levels of productivity, faster.

## Three Tiered Model
## Components of a New Hire's First Year

### Activation

- Task-based items to become 'set up' to work
- I-9, IdentiKey, Buff OneCard, W-4, Benefits, etc.
- Registering for orientations, completing required trainings

### Orientation

- Attending campus and system orientations and trainings
- College, division and/or departmental orientations
- Becoming oriented to the work and culture

### Integration

- Immersion in campus values, initiatives, and mission
- Mentoring, coaching, on-the-job training, interpersonal network development

New hires at CU Boulder will attend programs, and receive tools and resources at each point. Needs of newcomers are addressed over the first year by incorporating the campus onboarding philosophy as a guiding framework for delivering important institutional information during the phases at which newcomers are able to best retain and use the information effectively.

# CU Boulder Onboarding Philosophy

The purpose of onboarding is to move new employees to higher levels of productivity faster. Our campus onboarding philosophy is based on the research of Mark Stein and Lilith Christiansen[i] which encompasses the entire first year experience of a new employee.

## *Onboarding is a process, not an event.*

The **four pillars** (categories) that support our onboarding philosophy are:

- Cultural Mastery
- Interpersonal Network Development
- Strategy Immersion and Direction
- Early Career Support

The **three tiers** of onboarding a new hire will move through during the first year are:

- Activation (pre-start through first week)
- Orientation (becoming oriented to the campus, department, unit)
- Integration (integration to the institution's community)

## Chair/Supervisor's Role in Onboarding

- ✓ **Supervisors/Chairs play the most important role in onboarding new hires.**
- ✓ The direct supervisor is responsible for coordinating and overseeing onboarding for their new employee.
- ✓ The direct supervisor is responsible for helping the new hire move through the tiers of onboarding while integrating the four pillars (categories of learning) throughout the first year.

# Ownership for Onboarding at all Levels of the Institution

Successful onboarding at CU requires the involvement of **many departments** and individuals at all levels of the institution.

**CU System Administration** offices located in Denver are responsible for managing benefits, payroll and enterprise technology systems for all four campuses:

| *Benefits* | *Payroll Services* | *IT Systems* |
|---|---|---|
| Health | Direct Deposit | MyCUinfo portal |
| Dental | Pay Cards | MyLeave |
| Vision | W-4 | SkillSoft |
| Retirement | W-2 | |
| | International Tax Advisors | |

**Boulder Campus Department of Human Resources** is responsible for providing onboarding tools, templates, guidance and programs to new hires and their departments. Programs include the New Employee Welcome Experience, CU Discover Lunch and Learn series, and QuickStart Center.

**College, School, Division, or Institute** is responsible for providing guidance for specific policies and procedures and may provide an orientation to new hires. New Faculty Orientation facilitated by the Office of Faculty Affairs.

**Department** is responsible for providing information about the department's policies, business processes and other information to help new employees understand their work environment and meet colleagues.

**Chair, Supervisor, Working Group/Team** are responsible for providing one-to-one coaching to the new hire to help them learn the expectations of the role, on-the-job training, and social integration. In addition, new faculty should receive information for research, teaching, service and mentoring programs; as well as professional development, university resources and committee opportunities.

**New Hire** is responsible for engaging in their own onboarding by asking questions, taking notes, completing trainings, and learning about their college/division so they may quickly become contributing members of the institution.

# Chair/Supervisor Role and Responsibilities

**It is the department chair's and/or direct supervisor's responsibility to plan for the yearlong onboarding of the new hire**

## Three most important onboarding responsibilities for chairs/supervisors:

1. Be proactive – plan ahead
2. Coordinate and communicate with others who may be involved
3. Be available to your new hire

Supervisors coordinate with or delegate to others in their department who may be involved with the new employee set-up process.

## 1. Be Proactive:

- Ensure the new hire has a signed offer letter and has passed the background check *before* discussing a start date.
- Allow at least 2 week's lead-time before the new hire starts work.
    - By allowing ample time, this will ensure the appointment is entered and approved and the provisioning process takes place (IdentiKey, email)
- Use the tools and templates provided by Boulder Campus HR:
    - Use the Onboarding Checklist as your guide
    - Send a welcome email to the new hire
    - Create a 1st Week Itinerary

## 2. Coordinate and Communicate with Others:

- Coordinate the smooth set-up and transition of the newcomer by communicating with anyone in your department who will be involved with the set-up items.
- This may include:
  - Administrative Support Personnel
  - HR Liaison for department
  - Parking Liaison
  - Key Liaison
  - Telephone Liaison
  - Building Proctor
  - Team Members
- Schedule meetings and coordinate the 1st Week Itinerary to ensure all members are available to assist where necessary.
- Email 1st day instructions to the new hire:
  - Use the HR template to explain where to report; what time; where to park, and the expectations for their first day.
  - Attach the 1st Week Itinerary.
- Send an email to your department:
  - Announce the new hire's upcoming arrival
  - Provide information about the new employee, their role and any information relevant to the position.

## 3. Be Available to Your New Hire:

- **Make time** to personally welcome your new hire
- **Check in daily** for the first week
  - Helping your new hire acclimate to the department culture goes a long way towards increased productivity, commitment and engagement.
- **Encourage** the new hire to ask questions
- Introduce the new hire to department culture, norms, history, values
- **Cover professional duties and responsibilities.** New hires desire frequent feedback, interaction and guidance.

# CU Boulder HR:
# Resources for New Hires

## Orientations/Trainings for New Hires

- New Employee Welcome Experience (NEW-X)
  - Full-day introduction to the CU Boulder Campus, values, mission, tours and guest-speakers.

- CU Discover Lunch and Learn Series
  - Monthly lunch & learns to help newcomers better understand the perks, programs and initiatives at CU Boulder.

- Benefits Orientation
  - Presented by Employee Services, the office in Denver that manages benefits for all four campuses

## Online Resources for New Employees

- New Employee web page
  - Information on campus and CU system resources
  - Registration for orientation and training programs
  - New hire toolkit

- Email communications
  - Monthly emails to new hires with just-in-time information

# CU Boulder HR:
# Orientations for New Hires

## New Employee Welcome Experience (NEW-X)

- First event in a comprehensive, yearlong onboarding experience designed to help increase the understanding of CU Boulder's:
  - Governance and organizational structure
  - Values
  - Campus Initiatives
  - History
- Offered to new, permanent faculty and staff. Recommended attendance within the first 90 days of employment - up to the first year. (Call for guidance on rehires)
  - Staff, Faculty, Research Faculty, Post-Docs

### NEW-X Course Description

This daylong event will help newcomers become oriented with the CU Boulder campus. The New Employee Welcome Experience (NEW-X) starts at Old Main in the historic heart of campus where participants will begin to develop their understanding of what it means to be a member of the CU Boulder community.

**The day includes:**

- Classroom activities to learn about the governance structures, budget, history, values and initiatives of the campus.
- Tours - walking and bus tours of main campus and east campus
- Free Lunch – sponsored by Elevations Credit Union
  - Retirement providers available to answer questions at lunch

**Benefits for all four CU campuses are managed by Employee Services, the CU System Administration office in Denver.* ***This program is not a benefits orientation.***

# New Employee Welcome Experience – continued

## Schedule:

- Monthly on the second Thursday, 8:30 a.m. – 4:30 p.m.
- Location: Begins and ends at Old Main
- Full-day attendance is required

## How to Register:

- New, permanent faculty/staff who have begun work at CU Boulder may register through SkillSoft
    - For new hires who have not previously worked at CU Boulder (transfers from other campuses ok)
        - *For re-hires, please call for space availability*

1. Open SkillSoft from the MyCUinfo portal
2. Search for Instructor Led courses with the title *New Employee Welcome Experience*

a. Or use the following link – https://universityofcolorado.skillport.com/skillportfe/custom/login/saml/login.action?courseaction=launch&assetid=ilt_a10094

b. Click on the Boulder campus icon

c. Log into the MyCUinfo Portal using IdentiKey and password (The SkillSoft registration page for the New Employee Welcome Experience should automatically open)

3. Click the +/- button next to the "Sessions" folder to view the upcoming session dates
4. Hover your mouse over the date in which you are interested and click the blue "Enroll" option to the right of the date

New employees will receive a confirmation email at their Colorado.edu email address

Contact information: NewAtCU@Colorado.edu

# CU Discover Lunch & Learn Sessions

- Held over the lunch hour
- The next component of the comprehensive, yearlong onboarding program
- Offered to new employees within their first 12-18 months at CU Boulder
- New employees will learn more about the values, mission, operations and initiatives of the CU Boulder campus
- Provides an opportunity for new employees to build relationships with other new employees

## CU Discover Schedule:

- Monthly on the third Friday
- 12:00-12:45 p.m.
- Location: East Campus, ARC Building, Room #620
- Participants may bring their own lunch to the sessions

## How to Register:

- https://www.colorado.edu/hr/new-employees/cu_discover_lunch_amp_learns-185
- Registration links are provided in the session calendar on the right side of the CU Discover web page. Hover over the title and the registration link will come up.

## CU Discover Topics and Speakers:

Topics and speakers will rotate throughout the calendar year

Topics may include:

- Making Excellence Inclusive
- Higher Ed – a Whole Different Animal
- Compliance and Ethics at CU Boulder
- Research and Innovation at CU Boulder
- Perks and Programs for Employees
- Tuition Benefit Overview
- Demystifying Academic Traditions and Regalia in Higher Education

# Benefits Orientation: Employee Services

Employee Services, the office in Denver that manages benefits for all four CU campuses provides an in-person benefits orientation twice monthly on the Boulder campus.

- Benefits Orientation
- Employees encouraged to attend in their first 30 days
- **90-minute sessions**
- Overview of CU health, dental, vision and retirement plans

## Benefits Orientation Schedule:

- 2nd and 4th Thursday of each month
- 9:00-10:30 a.m.
- Location: Administrative and Research Center (ARC)
    - 3100 Marine St. Boulder, CO 80309
    - Third Floor (HR)
    - Room 346

## How to Register:

- https://www.cu.edu/employee-services/benefits/new-employee-benefits-orientations
- Click on the registration link for the desired session

# CU Boulder HR:
# Online Resources for New Hires

## New Employee Web Page

www.Colorado.edu/HR/new-employees

- **Centralized information 'hub'**
  - Getting Started at CU Boulder
  - Programs for New Hires
    - Registration for in-person training programs
  - Benefits
  - Perks and Discount Programs
  - Resources
    - OIEC, Calendars, Campus News, Safety, and more
  - Living in Boulder & Surrounding Areas
    - Buying, Renting, Childcare, Schools, Recreation

## New Hire Toolkit

- New Hire Checklist
- Welcome Information Packet
- Step-guide for Set-Up in MyCUinfo Portal
  - W-4, Direct Deposit, CU Alerts
- First Year At-a-Glance Guide
- SkillSoft Guide (training portal)

## Email Communications

- Pre-start welcome from OIT with ***instructions for claiming IdentiKey***
  - Newcomers are encouraged to activate IdentiKey prior to the first day of work
- Monthly emails to new staff with just-in-time information about campus events, initiatives, training sessions, etc.

# CU Boulder HR: Online Resources for Departments

## Chairs/Supervisors and HR Liaisons

https://www.colorado.edu/hr/onboarding

- **Tools, Templates and Guidance for Onboarding New Hires**
  - CU Boulder's Onboarding Philosophy
  - What to Expect from HR
  - Your Role and Responsibilities
  - Links to Information for Newcomers

## Onboarding Toolkit

- Onboarding Checklist
- First Week Itinerary Template
- Department Reference Guide Template
- Welcome Email Templates
  - Classified
  - University Staff

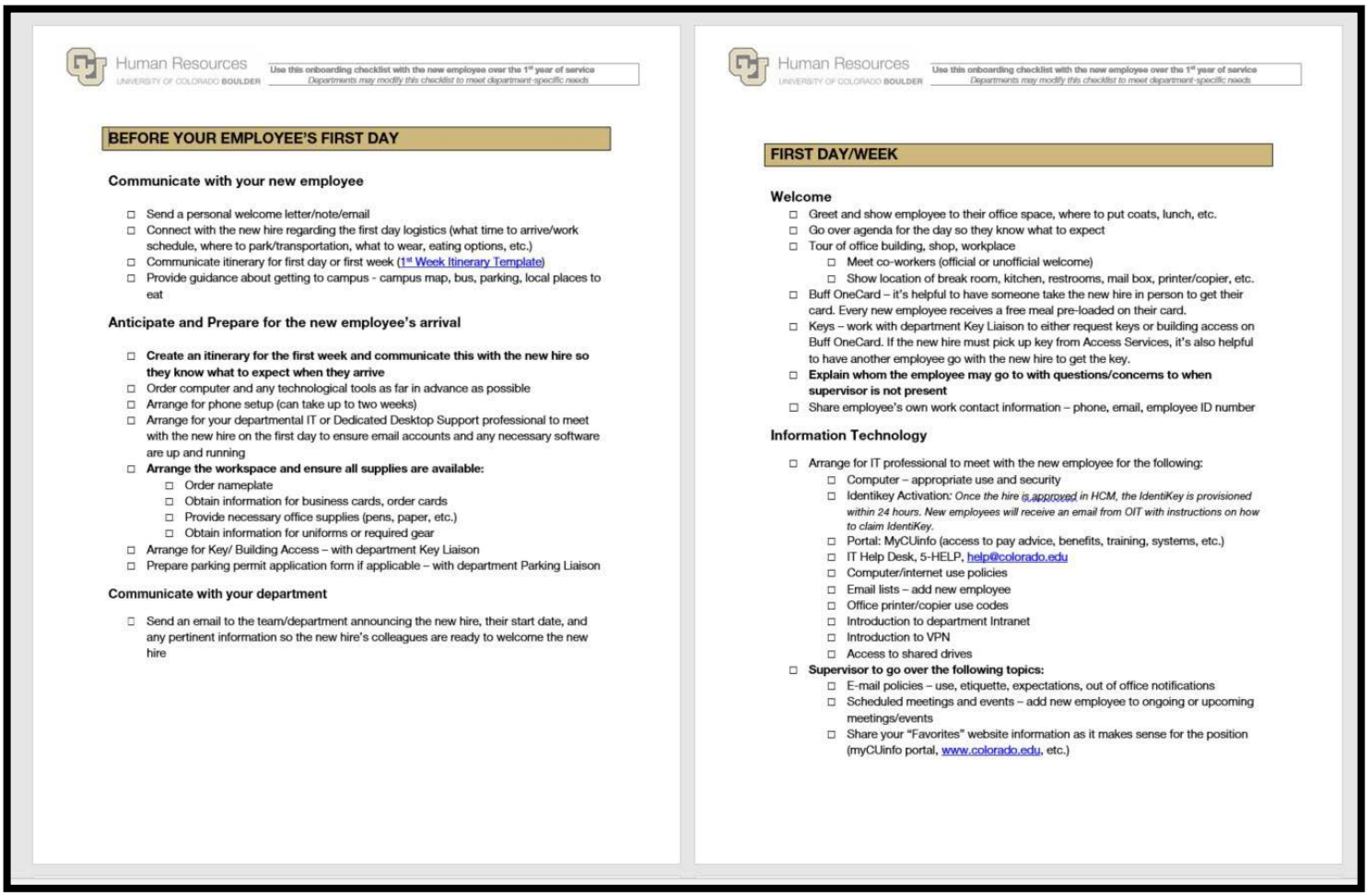
## Email Communications

- Pre-start onboarding email with onboarding toolkit attached
- Monthly emails with information about employee learning programs such as CU Discover, NEW-X and more!

# Examples of Onboarding Tools

## Onboarding Checklist

**Don't recreate the wheel!** Use this template to help you remember all the things you need to do for new employee – customizable



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Use this onboarding checklist with the new employee over the 1st year of service
*Departments may modify this checklist to meet department-specific needs*

### BEFORE YOUR EMPLOYEE'S FIRST DAY

**Communicate with your new employee**

- ☐ Send a personal welcome letter/note/email
- ☐ Connect with the new hire regarding the first day logistics (what time to arrive/work schedule, where to park/transportation, what to wear, eating options, etc.)
- ☐ Communicate itinerary for first day or first week (1st Week Itinerary Template)
- ☐ Provide guidance about getting to campus - campus map, bus, parking, local places to eat

**Anticipate and Prepare for the new employee's arrival**

- ☐ **Create an itinerary for the first week and communicate this with the new hire so they know what to expect when they arrive**
- ☐ Order computer and any technological tools as far in advance as possible
- ☐ Arrange for phone setup (can take up to two weeks)
- ☐ Arrange for your departmental IT or Dedicated Desktop Support professional to meet with the new hire on the first day to ensure email accounts and any necessary software are up and running
- ☐ **Arrange the workspace and ensure all supplies are available:**
  - ☐ Order nameplate
  - ☐ Obtain information for business cards, order cards
  - ☐ Provide necessary office supplies (pens, paper, etc.)
  - ☐ Obtain information for uniforms or required gear
- ☐ Arrange for Key/ Building Access – with department Key Liaison
- ☐ Prepare parking permit application form if applicable – with department Parking Liaison

**Communicate with your department**

- ☐ Send an email to the team/department announcing the new hire, their start date, and any pertinent information so the new hire's colleagues are ready to welcome the new hire

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Use this onboarding checklist with the new employee over the 1st year of service
*Departments may modify this checklist to meet department-specific needs*

### FIRST DAY/WEEK

**Welcome**

- ☐ Greet and show employee to their office space, where to put coats, lunch, etc.
- ☐ Go over agenda for the day so they know what to expect
- ☐ Tour of office building, shop, workplace
  - ☐ Meet co-workers (official or unofficial welcome)
  - ☐ Show location of break room, kitchen, restrooms, mail box, printer/copier, etc.
- ☐ Buff OneCard – it's helpful to have someone take the new hire in person to get their card. Every new employee receives a free meal pre-loaded on their card.
- ☐ Keys – work with department Key Liaison to either request keys or building access on Buff OneCard. If the new hire must pick up key from Access Services, it's also helpful to have another employee go with the new hire to get the key.
- ☐ **Explain whom the employee may go to with questions/concerns to when supervisor is not present**
- ☐ Share employee's own work contact information – phone, email, employee ID number

**Information Technology**

- ☐ Arrange for IT professional to meet with the new employee for the following:
  - ☐ Computer – appropriate use and security
  - ☐ Identikey Activation: *Once the hire is approved in HCM, the IdentiKey is provisioned within 24 hours. New employees will receive an email from OIT with instructions on how to claim IdentiKey.*
  - ☐ Portal: MyCUinfo (access to pay advice, benefits, training, systems, etc.)
  - ☐ IT Help Desk, 5-HELP, help@colorado.edu
  - ☐ Computer/internet use policies
  - ☐ Email lists – add new employee
  - ☐ Office printer/copier use codes
  - ☐ Introduction to department Intranet
  - ☐ Introduction to VPN
  - ☐ Access to shared drives
- ☐ **Supervisor to go over the following topics:**
  - ☐ E-mail policies – use, etiquette, expectations, out of office notifications
  - ☐ Scheduled meetings and events – add new employee to ongoing or upcoming meetings/events
  - ☐ Share your "Favorites" website information as it makes sense for the position (myCUinfo portal, www.colorado.edu, etc.)

# 1st Week Itinerary Template

**Show your new employee you've been planning for their arrival!**
Coordinate with the appropriate parties, add your own specific information to the highlighted area and email a copy to your new employee before their first day.

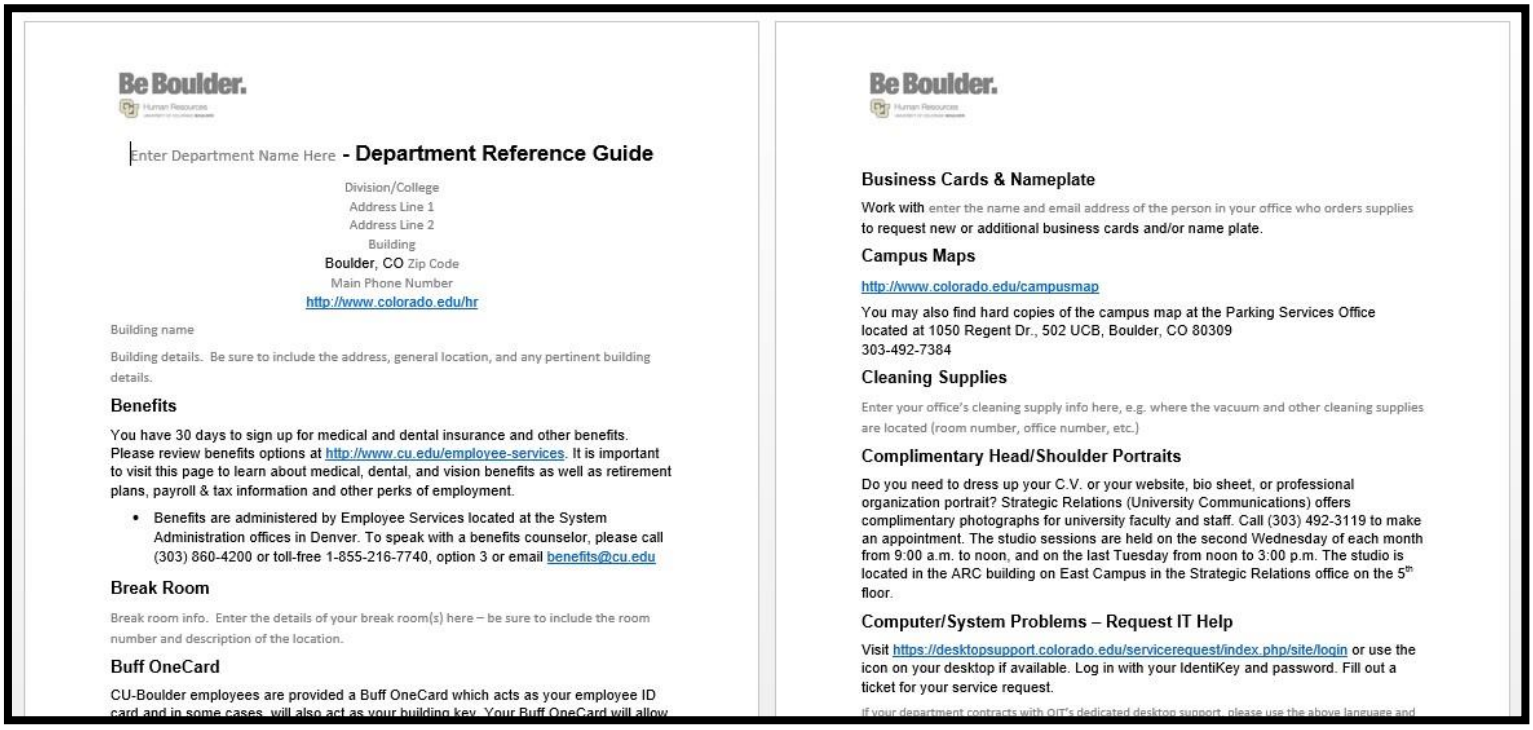
| [Position Title or New Employee's Name] Onboarding Schedule | | | | |
|---|---|---|---|---|
| **Date** | **Time** | **Training Session/Task** | **Location** | **Notes** |
| 12/14/2015 | 8:00 am | Arrive at [Building Name/ Acronym for name] [Street Address] Boulder, CO 80309 | [Floor, office # or specific location e.g. 3rd Floor Reception area] | [Name and Title of person who will meet new hire] will meet you in [specific area, e.g. the reception area] and show you to your office and go over agenda for the day. [You will receive a New Hire Checklist; any additional documents] |
| | 8:30 – 9:30 am | Tour of Department and Meet staff (brief hello to each) | [specific location, e.g. ARC 3rd Floor] | [Name of supervisor or person who will be responsible] will walk you around meet the staff and show key features of the floor |
| | 9:00-11:30 am | Meet with [name of supervisor] | [office number] [name of supervisor]'s Office | Review New Hire checklist, Work Contact information, and best way to ask questions… |
| | 11:30 am-1:00 pm | Obtain BuffOne Card/EcoPass | BuffOne Card Office, C4C | [name of co-worker and title] will take you to the BuffOne Card Office. Items to bring: Photo ID |
| | | Lunch with [Supervisor or co-workers' names and titles] | Center for Community (C4C) | [Names of co-workers] will take you to the Center for Community (C4C). A free meal is pre-loaded on your BuffOne Card! |
| | 1:00 – 2:00 pm | Meet with [IT Person or other designated person, title] to set up computer and email access | [office number] [office description e.g. Your Office] | [Name of IT person] will meet you in your office. |
| | 2:00 – 3:00 pm | Meet with [name and title] for department overview | [office number] [office description] | |
| | 3:00 – 4:30 pm | Office Time: Spend time getting settled | [office number] [office description] | Get a feel for your office space & make a list of questions you have. |

# epartment Reference Guide Template

**The "A-Z" Guide for your department!**
Campus-wide information is already included.
Customize for your department-specific information.

Add your own department specifics such as:

- Location of break rooms, cleaning supplies, office supplies
- Contact person for name plates or business cards
- Professional association membership information
- Office and building maintenance resources



Be Boulder.

Enter Department Name Here **- Department Reference Guide**

Division/College
Address Line 1
Address Line 2
Building
Boulder, CO Zip Code
Main Phone Number
http://www.colorado.edu/hr

Building name

Building details. Be sure to include the address, general location, and any pertinent building details.

**Benefits**

You have 30 days to sign up for medical and dental insurance and other benefits. Please review benefits options at http://www.cu.edu/employee-services. It is important to visit this page to learn about medical, dental, and vision benefits as well as retirement plans, payroll & tax information and other perks of employment.

- Benefits are administered by Employee Services located at the System Administration offices in Denver. To speak with a benefits counselor, please call (303) 860-4200 or toll-free 1-855-216-7740, option 3 or email benefits@cu.edu

**Break Room**

Break room info. Enter the details of your break room(s) here – be sure to include the room number and description of the location.

**Buff OneCard**

CU-Boulder employees are provided a Buff OneCard which acts as your employee ID card and in some cases, will also act as your building key. Your Buff OneCard will allow

Be Boulder.

**Business Cards & Nameplate**

Work with enter the name and email address of the person in your office who orders supplies to request new or additional business cards and/or name plate.

**Campus Maps**

http://www.colorado.edu/campusmap

You may also find hard copies of the campus map at the Parking Services Office located at 1050 Regent Dr., 502 UCB, Boulder, CO 80309
303-492-7384

**Cleaning Supplies**

Enter your office's cleaning supply info here, e.g. where the vacuum and other cleaning supplies are located (room number, office number, etc.)

**Complimentary Head/Shoulder Portraits**

Do you need to dress up your C.V. or your website, bio sheet, or professional organization portrait? Strategic Relations (University Communications) offers complimentary photographs for university faculty and staff. Call (303) 492-3119 to make an appointment. The studio sessions are held on the second Wednesday of each month from 9:00 a.m. to noon, and on the last Tuesday from noon to 3:00 p.m. The studio is located in the ARC building on East Campus in the Strategic Relations office on the 5th floor.

**Computer/System Problems – Request IT Help**

Visit https://desktopsupport.colorado.edu/servicerequest/index.php/site/login or use the icon on your desktop if available. Log in with your IdentiKey and password. Fill out a ticket for your service request.

If your department contracts with OIT's dedicated desktop support, please use the above language and