

CITY OF MADISON

In-Person Onboarding of New Employees

Onboarding is the process of introducing and integrating new employees into an organization.

The Goals of Onboarding

- Make them feel welcome in the agency
- Help them understand the new role and expectations
- Create connections across the department, city, and industry, to help them grow in the new role
- Guide them in exploring technical and people skills needed
- Plan for learning and development

Onboarding Timeline

Onboarding begins before the employee joins the organization and lasts until the new employee is able to work independently in their role. This document includes checklists for the following timeframes:

- [Before the employee starts](#)
- [The first day](#)
- [The first week](#)
- [The first month](#)
- [The first 6 months](#)

Onboarding Elements



Schedule, Job Duties, and Expectations



Socialization



Work Environment



Technology, Supplies, and Equipment



Learning and Development

New Employee In-Person Onboarding Checklist

Before the Start Date

For supervisors, Onboarding begins well before the start date. Here is your opportunity to intentionally craft a welcoming work environment, to prepare your team, and ensure that equipment is ready and tested before the new employee's first day. Great planning here ensures that you are confident and prepared, which means that you can focus fully on your new team member.



Schedule, Job Duties, and Expectations

- ☐ Process your hire in NeoGov. Instructions are available in the [OHC User Guide](#).
- ☐ Prepare [New Employee Onboarding Schedule](#) for the first two weeks
- ☐ Add regularly scheduled meetings (e.g. staff and department) to employee's calendar
- ☐ Assemble electronic New Employee Welcome Packet. Send 5 business days before start.
 - Required Items:
 - Job description
 - Welcome letter
 - [City of Madison Mission, Vision, Values, Service Promise Poster](#)
 - Recommended Items:
 - Department organizational chart
 - Department mission, values, and other key information
 - Department contacts and phone list (include or highlight IT Authorized Contacts, Equity Team Co-leads, and Payroll Clerk)
 - Building and/or office map
 - Parking and transportation information
- ☐ Welcome phone call to new employee (at least 5 business days before start):
 - Confirm start date, time, and other details
 - Let them know you will be emailing a New Employee Welcome Packet and ask them to reply to confirm they received it.
 - Let them know they will have an onboarding partner/buddy and ask if they'd like to be introduced via email before their first day.
 - Request a short bio and picture. Ask permission to cc them with non-City email on New Employee Intro Message to department/team

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New Employee In-Person Onboarding Checklist

Name:

Start Date:



Socialization

- ☐ Introduce new employee to your department or team via email. Include start date, employee's role, short bio and picture. Copy the new employee, if appropriate.
- ☐ Set up meetings with critical people for the employee's first few weeks, including Agency leaders, team members, cross-functional collaborators, colleagues with similar positions in other agencies
- ☐ Arrange for a virtual or in-person coffee meet and greet for the employee's first week.
- ☐ Choose and meet with the onboarding buddy and review expectations



Work Environment

- ☐ Order building and/or office area keys, business cards, and name plate
- ☐ Add employee to relevant email lists, SharePoint sites, and shared drives
- ☐ Update department website, SharePoint sites, and [Municipal Government Resource Guide](#)



Technology, Supplies, and Equipment

- ☐ Order any technology equipment and software through IT Authorized Contact
- ☐ Request access to appropriate common drives and programs from department IT contact.



Learning and Development

- ☐ Register new employee for New Employee Orientation with HR.
 - Email HR@cityofmadison.com
 - A Zoom meeting invitation will be emailed to the new employee's supervisor
 - When possible, Human Resources will coordinate delivery of physical orientation materials to the new employee's work location
 - Orientation materials are available in electronic format on the [City of Madison HR Benefits](#) page and via hyperlinks on the [Employee Orientation Checklist](#)
 - Confirm that new employee is included in New Employee Orientation and received Zoom invitation.
- ☐ Arrange for learning and development activities to be an appropriate percentage of the [New Employee Onboarding Schedule](#). Where possible, do your best to vary the learning modes (i.e., online modules, virtual or in-person training, hands-on practice and review, discussions, and coaching)

What training, development, learning does the employee NEED . . .

By the end of Day 1: Topic, Time, Mode

By the end of Week 1: Topic, Time, Mode

Need assistance with your New Employee Onboarding?

Contact Human Resources at HR@cityofmadison.com or speak with your HR Analyst for assistance.

New Employee In-Person Onboarding Checklist

By the end of Month 1: Topic, Time, Mode

In order to work independently: Topic, Time, Mode

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New Employee In-Person Onboarding Checklist

Name:

Start Date:

Employee's First Day

The big day is here! Now is the time to focus on the new employee and make them feel welcome. While part of the day will be spent in City of Madison Orientation, the remainder is a time to begin connecting with the people, the position, and performance expectations.



Schedule, Job Duties, and Expectations

- ☐ Walk through the [New Employee Onboarding Schedule](#), and confirm new employee has received invitations to participate in HR Orientation and any other required meetings or conference calls
- ☐ Provide an overview of the department, using Welcome Packet materials (e.g., mission, values, organizational structure, and goals/work plans)
- ☐ Review job description, outline of duties, and expectations
- ☐ Describe how employee's job fits in the department, and how the job and department contributes to the division and the organization
- ☐ Review hours of work. Explain department policies and procedures including: overtime, use of vacation and sick time, holidays, telework expectations, etc. Explain any flexible work policies or procedures.
- ☐ Address cultural expectations such as how the department uses email, Outlook calendars, work-issued cell phones and radios, and expectations for Skype and Zoom (if applicable).



Socialization

- ☐ Make an appointment to connect with the employee on the first day, preferably at the beginning and end of the day
- ☐ Introduce employee to others in the department by setting up group conference calls with work unit leaders, other managers, or the team
- ☐ Be available to introduce employee to their onboarding partner/buddy at the beginning of their first check in



Work Environment

- ☐ Explain departmental procedures for ordering supplies and ask if there are any immediate needs. If so, facilitate the process for receiving basic supplies as appropriate.
- ☐ Confirm that their work space is conducive to productive work

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New Employee In-Person Onboarding Checklist



Technology, Supplies, and Equipment

- ☐ Walk through the [Information Technology](#) page on EmployeeNet, pointing out the IT Service Center, Training & Support, and Cybersecurity links
- ☐ Review the [Telework Toolkit](#) (if applicable) and remind them of the naming convention to access EmployeeNet resources:
 - Username = log on for your computer (typically department initials + employee initials)
 - Password = single sign-on password (used for your computer, VPN, SharePoint, MUNIS, etc.)



Learning and Development

- ☐ Review the Learning and Development activities in the [New Employee Onboarding Schedule](#)
- ☐ Provide an overview for how the department is doing Learning + Development. Walk the employee through the online resources and highlight any courses that should be completed by the end of the day:

Departmental Resources: Manuals, PowerPoint Slides, Books, Job Aids

- Location
- Topic

Meetings or Trainings: With team members, [City trainings](#)

- Topic
- Presenter/Facilitator

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New Employee In-Person Onboarding Checklist

Name:

Start Date:

First Week

The following will help your new employee leave the week on a high note.



Schedule, Job Duties, and Expectations

- ☐ Connect with the employee each day and schedule regular check-ins.
- ☐ Explain how your department conducts regular check-ins and goal-setting
- ☐ Share departmental work plan and have the employee begin their individual work plans (if applicable)
- ☐ Review the probation process and identify dates for employee onboarding check-ins. Give them a copy of the [Employee Onboarding Check-in](#) so they know what to expect.



Socialization

- ☐ Have a department welcome gathering, such as a virtual or in-person coffee. Be sure to invite the Department Head and any key people outside of your department.



Work Environment

- ☐ Set aside time to talk about work experiences of your team – what's been working and lessons learned. Provide opportunity for them to ask questions.



Technology, Supplies, and Equipment

- ☐ Explain how to submit a [IT Service Center](#) ticket
- ☐ Identify any non-IT support resources for department-specific technology, supplies, and equipment
- ☐ Confirm employee's ability to access the technology they need for their role.
 - ☐ Desk phone, radio, or cell phone and voicemail
 - ☐ Email and email lists
 - ☐ Shared drives
 - ☐ SharePoint
 - ☐ Skype and Zoom
 - ☐ Specialized software (MUNIS, Accela, CityWorks, etc.)

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New Employee In-Person Onboarding Checklist



Learning and Development

Key Question: What training, development, learning does the employee NEED by the end of Week 1, and how will it be provided?

- ☐ Review the Learning and Development activities in the [New Employee Onboarding Schedule](#)
- ☐ Walk the employee through the online resources and highlight any learning and development that should be completed by the end of Week 1:

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New Employee In-Person Onboarding Checklist

Name:

Start Date:

First Month (Weeks 2-4)

The goal is for the employee to expand existing knowledge of processes. They should begin to see their role in the context of the larger team, department, and City of Madison mission.



Schedule, Job Duties, and Expectations

- ☐ Schedule and conduct regularly occurring one-on-one meetings
- ☐ Continue to provide timely, on-going, meaningful “everyday feedback”
- ☐ Elicit feedback from the employee
- ☐ Review initial draft of employee work plan (if applicable)
- ☐ Discuss performance
- ☐ Meet with department Payroll clerk to learn how to enter vacation, holidays, sick leave
- ☐ Ensure that they received their first paycheck and ask if they have any questions about withholdings or direct deposit. If so, point employee toward [EmployeeNet > Payroll](#) for resources and contacts



Socialization

- ☐ Continue introducing employee to key people and bringing them to meetings and events
- ☐ Have employee “shadow” the supervisor at conference calls and meetings to get exposure to other departments and support services
- ☐ Support and encourage employee participating on appropriate committees and/or cross-functional teams, both internal and external to City
- ☐ Solicit employee’s feedback and suggestions on ways to improve the onboarding experience through: https://www.surveymonkey.com/r/City_HR_Orientation_Onboarding



Technology, Supplies, and Equipment

- ☐ Ensure employee has fully functioning technology, systems access, supplies, and equipment and understands how to use them

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New Employee In-Person Onboarding Checklist



Learning and Development

- ☐ Review Learning and Development components of the New Employee Onboarding Schedule to confirm completion of all required training and development activities
- ☐ Ensure employee has completed or is signed up for APM 3-5
- ☐ Identify whether your new employee must attend other required trainings for department or role
- ☐ Encourage participation in committees like the [Multicultural Affairs Committee](#) (MAC), [Women's Initiative Committee](#) (WIC), or [Latinx Community Engagement Team](#) (LCET), [employee associations](#), and learning opportunities such as [Racial Equity and Social Justice Initiative](#) activities.
- ☐ Discuss Professional Development goals and begin discussions of long-term development activities:
 - ☐ [Leadership Development Programs](#)
 - ☐ [City of Madison Professional Development Courses](#)
 - ☐ Industry-sponsored trainings
 - ☐ Required certifications, licensures, and continuing education credits for the role
- ☐ Review the Learning and Development activities in the New Employee Onboarding Schedule
- ☐ Walk the employee through any learning and development and courses that should be completed by the end of their first month:

CITY OF MADISON

New Employee In-Person Onboarding Checklist

Name:

Start Date:

First Six Months (Months 2-6)

At this point, the new employee should be applying their skills and knowledge and contributing to department goals.



Schedule, Job Duties, and Expectations

- ☐ Schedule and conduct regularly occurring one-on-one meetings
- ☐ Continue to provide timely, on-going, meaningful “everyday feedback”
- ☐ Review and revise employee’s work plan (if applicable)
- ☐ Schedule formal [Employee Onboarding Check-in](#) meetings (usually after 3 and 6 months)
- ☐ Once the employee has passed probation, introduce them to the [Employee Check-in Process](#). Have a meeting to establish the expectations and goals for future check-ins.



Socialization

- ☐ Discuss how the employee is connecting with team members and discuss ways to get more connected with fellow employees
- ☐ Ask about connections to other departments and initiatives and make introductions to help widen the employee’s circle of influence and connection



Technology, Supplies, and Equipment

- ☐ Ensure that technology, supplies, equipment are fully functioning and access is consistent



Learning and Development

Key Questions: What additional training, development, learning does the employee NEED in order to become independent in the position? What additional training and development would provide growth opportunities for the employee?

- ☐ Review Learning and Development components of the New Employee Onboarding Schedule to confirm completion of all required training and development activities.
- ☐ Show employees the resources for building their [Individual Development Plan](#).

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