

Portland Community College

# **Onboarding Manual**



**Portland  
Community  
College**

Human Resources

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## Introduction

Managers play the largest role in making new employees feel welcome, prepared and empowered. We know that recruiting, interviewing and hiring a new employee is time consuming and onboarding can often seem daunting. However, successful onboarding is crucial to retaining great talent and the first several months on the job are critical to job satisfaction, morale and productivity.

The PCC Onboarding Manual will help you provide your new employee with the best possible experience as they begin their career at Portland Community College. This guide outlines required activities you must complete with your new employee and the timeframe in which these activities are to be completed. It also contains tools to help you conduct check-in conversations at various points in the process.

The best practices and suggestions gathered here will assist you in managing the onboarding process of your new employee and allow you to tailor the experience to specific campus/center and departmental needs. If you have any questions about the onboarding activities outlined in this manual please reach out to your Human Resources Representative.

# Onboarding Process Overview

## Pre-Arrival

- ☐ Inform your team
- ☐ Prepare a workstation
- ☐ Stay in contact with your new employee
- ☐ Plan and schedule first week activities

## First Day and Week

- ☐ Greet your new employee and facilitate introductions
- ☐ Complete required paperwork
- ☐ Set expectations
- ☐ Review college systems, procedures and resources
- ☐ Assist with completion of the required onboarding curriculum
- ☐ Conduct first week check-in

## First Month

- ☐ Schedule a regular 1:1 with your employee
- ☐ Discuss professional development needs

## First 90 Days

- ☐ Walk through the performance assessment process and cycle
- ☐ Guide your employee through the goal setting process
- ☐ Conduct a 90 day progress check-in

## Pre-Arrival

In the time between an accepted offer and the first day of work, you should be establishing a strong foundation on which your new employee can build. This means sharing relevant and timely information, preparing a functional workstation and notifying key colleagues of the new employee's arrival.

1. **Inform your team.** Share some basic information about their new colleague such as background and experience. If the role works with employees outside of your immediate team or department, consider sharing this information with those individuals as well.

Informing your team of the new employee's arrival also permits assistance with the onboarding process. Many departments have administrative/executive assistants and/or colleagues support new employees through onboarding. This is a great best practice, as it affords the new employee the opportunity to build relationships with their coworkers.

2. **Prepare a workstation.** Make sure you know where your new employee will sit. Ensure they will have access to the necessary equipment, supplies and furniture.
3. **Stay in contact with your new employee.** It is recommended that you call or email your new employee to welcome them to the team shortly before their first day (especially if there is a lag between the acceptance of an offer and the first day of work). Items to address include: start date and time and where to meet you on the first day.

You may also want to include links to web resources outlining parking and transportation options and required documentation to bring with them on their first day (both of these items are included on the [New Employee Onboarding and Resources](#) webpage).

4. **Plan and schedule first week activities.** Before your new employee arrives, create an agenda for their first day/week. It is recommended to schedule one-on-one meetings for your new employee with key colleagues. Ensure they get a campus/center tour. Consider having a team get-together or lunch on the first day. Be sure to build in breaks and time for your new employee to get to know their coworkers.

## Pre-Arrival Resources

- [New Employee Onboarding and Resources](#) webpage

## First Day and Week

To be successful, employees need to have clarity about their role and responsibilities from day one. The first day/week is your opportunity to create a lasting first impression for your new employee that is warm and welcoming while setting clear expectations.

It is suggested that you review the New Hire Checklist (linked under [First Day and Week Resources](#) below) so you are familiar with the tasks your employee should be completing.

1. **Greet your new employee and make introductions.** You are strongly encouraged to greet your new employee when they arrive. If, for some reason, you cannot be there to welcome the new employee personally, please arrange for a colleague to be available. Introduce the new employee to their colleagues and workspace during this time.
2. **Complete required new employee paperwork.** It is your responsibility to confirm that all new hire documentation is completed. The following forms must be completed by you and/or your new employee and submitted to Human Resources within 3 business days of the employee's first day of employment:
  - [I-9 Form](#)
  - [Form W-4](#) and [Form OR-W-4](#)
  - [Employee Information Form](#)

If you have questions about your obligations or need help completing the I-9 form please contact Human Resources. If your employee needs assistance with Form W-4, direct them to Payroll.

3. **Set expectations.** It is recommended that you have a one-on-one meeting with your new employee during their first day. This will help you establish a relationship with them and give them a greater sense of belonging. This is your opportunity to establish a standard work schedule, discuss your expectations for the role and outline key duties and responsibilities.

For specific ideas on what to discuss during this meeting, see the [First Day Meeting: Conversation Guide](#) on page 8 of this manual.

4. **Review college systems, procedures and resources.** It is important for new employees to be aware of the different systems PCC uses to conduct business and the resources available to them. You should review the following resources with your new employee:
  - [MyPCC](#)
  - [PCC Spaces](#)
  - [MyCareer@PCC](#)
  - [Time reporting](#)
    - Breaks and meal periods
    - Vacation and Sick Leave
  - Department and Campus/Center-specific processes and resources

5. **Assist with completion of the required onboarding curriculum.** Every new employee is automatically assigned the New Employee Onboarding curriculum in [MyCareer@PCC](#). This online training includes a review of PCC's policies as well as mandatory Title IX, FERPA and Mandatory Reporter training. It also allows employees to register for New Employee Safety Orientation and Group Benefits Orientation (if applicable). Ensure that your employee is familiar with MyCareer@PCC and aware of their obligation to complete this online training.
6. **Conduct first week check-in.** It encouraged that you meet with your new employee again at the end of their first week. This is your opportunity to inquire about the onboarding process and answer any questions that your new employee may have.

For specific ideas on what to discuss during this check-in, see the [First Week Check-In: Questions to Ask](#) on page 9 of this manual.

## First Day and Week Resources

- [New Hire Checklist](#)
- [First Day Meeting: Conversation Guide](#)
- [First Week Check-In: Questions to Ask](#)
- [MyCareer@PCC Resources](#) webpage

## First Month

Continue to build rapport with your new employee during the first month. Be aware that they are still acclimating to their new environment and discovering the norms and culture of your team. We recommend you connect with your new employee's colleagues toward the end of the first month to get additional perspective on how onboarding is progressing.

1. **Schedule a regular 1:1 with your employee.** Now that your employee has had some time to adjust to their new environment, it is suggested that you schedule regular check-ins. This allows you to provide consistent feedback to your employee on a regular, on-going basis. Encourage your direct report to set the agenda or bring topics to discuss during your meeting. You might also want to identify some standing items that you discuss each meeting as well.

During the first month, you should also be monitoring your employee's completion of the online New Employee Onboarding curriculum. Use your 1:1 time to ask about their progress and answer any questions that may arise.

2. **Encourage professional development.** PCC prides itself on providing employees with opportunities to develop both professionally and personally. These opportunities include professional development workshops, tuition assistance, grants for external conferences or workshops and Lynda.com courses on myriad topics. Please make certain that your new employee is aware of the training and development options available to them. For more information about these initiatives, please visit the [Professional and Organizational Development](#) webpage.

## First Month Resources

- [Professional and Organizational Development](#) webpage
- [MyCareer@PCC](#)
- [MyCareer@PCC Resources](#)



## First 90 Days

1. **Walk through the performance assessment process and cycle.** The format of and feedback contained in a performance assessment should never be a surprise to the employee being assessed. Within the first 90 days on the job, take a moment to walk your new employee through the performance assessment process and cycle. You should:
  - Confirm they are aware of the probationary period that applies to their classification.
  - Outline when and how their performance will be assessed.
  - Inform them that you are committed to providing timely and specific feedback regarding their performance.
  - Discuss their preferred method for receiving feedback.

For more information on the assessment process, visit the [Assessment](#) webpage. If you are unsure of the specifics regarding your employee's probationary period, please review the applicable document on the [Contracts, Handbooks and Policies](#) webpage. If you have additional questions, please contact your Human Resources Representative.

2. **Guide your employee through the goal setting process.** Goal setting is a key responsibility of any manager and doing so is integral to fostering deeper employee engagement. It is also a great way for you to guide improvement and establish clear criteria for success. At this early juncture, it is recommended that you set short-term goals – role, job duty or project specific goals focused on acclimating to their new position – as well as long-term goals related to professional development.

For additional guidance on setting goals please review the *Establishing Performance Goals* section of the Assessment webpage.

3. **Conduct a 90 day progress check-in.** At the end of your employee's first three months, it is recommended that you conduct a brief check-in regarding their progress and performance.

For specific ideas on what to discuss during this check-in, see the [90-Day Performance Check-In: Conversation Guide](#) on page 10 of this manual.

## First 90 Days Resources

- [Contract, Handbook and Policies](#) webpage
- [Assessment](#) webpage
- [90-Day Performance Check-In: Conversation Guide](#)

# Appendix

## First Day Meeting: Conversation Guide

Use the topics compiled below to help facilitate your introductory meeting.

- Discuss:
  - Organization and department culture
  - Team dynamics
  - Preferred work schedule
  - Communication styles
- Share relevant **details about yourself**. Considering talking about:
  - Your managerial style
  - Your professional background
- **Get to know your new employee**. Consider asking about:
  - Their professional goals
  - Their training preferences (online, in-person, self-study, instructor-led, hands on, on-the-job, shadowing etc.)
  - Motivation – What motivates them to be successful?
  - Work style – Do they prefer working independently or in a team?
  - Recognition – Do they prefer public or private recognition?
- Share information about the college:
  - Discuss the [Strategic Plan](#)
  - Explain how your department supports college initiatives
- **Set expectations** regarding their new role:
  - Walk through your department's organizational chart and discuss how your new employee fits into the structure
  - Review the position description and/or “desk description” with your employee:
    - Highlight key duties and relationships
    - Discuss comfort level completing essential tasks
  - Explain current and/or upcoming projects

## First Week Check-In: Questions to Ask

The primary purpose of checking in at the end of the first week is to ensure your new employee feels welcome and onboarding is progressing nicely. It is also an opportunity for you to field questions that have come up throughout the week. Try and let your employee drive this conversation. If you need help jumpstarting this conversation, you can try asking the following questions:

- **“What was your favorite part of your first week?”** This question starts the conversation on a positive note. It also provides insight into what drives your new employee. You can use this information to help identify goals and prioritize tasks.
- **“Was there anything included in your onboarding that surprised you?”** This question is helpful in contextualizing your employee’s onboarding experience. It may also be an opportunity to provide clarity around concerns that bubble up here.
- **“Do you feel welcome in the department?”** This question will help you gauge how comfortable your employee feels with their new coworkers. If answering this question is difficult for your employee it may be a sign that you need to work with your team to proactively address the situation.
- **“Have you been able to start the online New Employee Onboarding curriculum?”** Use this time to check-in with your new employee about the resources provided to them in MyCareer@PCC as a part of their onboarding. If they haven’t started the content or are struggling with it, review the process with your employee and answer any questions they may have.
- **“What questions or concerns do you have at this time?”** The last five to ten minutes of your check-in should be an opportunity for your new employee to ask any questions or share any concerns they have after the first week. It is incumbent upon you to resolve any issues as quick as possible. This demonstrates to your new employee that you value them and are committed to supporting their work.

## 90-Day Performance Check-In: Conversation Guide

Conducting a 90-Day performance check-in allows you to provide feedback on the first three months of employment as well as provide context about the upcoming 6-month performance assessment. It also gives you an opportunity to proactively address performance issues should there be any. You should be providing timely feedback in your regular one-on-one meetings, but setting aside a block of time to explicitly discuss performance sets a good precedent and may prompt your employee to share with you any issue they may be having when they might not otherwise.

The topics gathered below can assist you in conducting this check-in:

- **Review the milestones reached in first three-months.** Are deliverables meeting your expectations? Are deadlines being met? If so, share specific positive feedback regarding the behaviors you'd like to reinforce. If not, come prepared with an action plan to discuss with your employee. Negotiate a reasonable timeframe in which to improve performance where expectations are not being met.
- **Discuss the need for additional training or shadowing.** Ask your employee about their comfort level regarding the tasks assigned to them. If you have noticed an area in which your employee might benefit from training or additional support, discuss the opportunities available to them and assist them in attaining appropriate resources.
- **Outline any upcoming projects with your employee.** At the three-month mark, your employee should be comfortable with their day-to-day tasks and you may be ready to start assigning them additional or more advanced work. Walk your employee through any projects to which they will be contributing in the next few months. Be sure to provide them with any resources they should need to prepare for these new projects.