Onboarding is a process to welcome, educate and assimilate new employees into an organization over a period of time.

This process builds the foundation for a work environment that promotes performance, productivity, collaboration and a sense of community with an understanding of the organizational mission and values.
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1. **Current Conditions**

**Currently there is no “official” onboarding process within Business & Finance (B&F)**

Each year approximately 200 new employees are hired within Business & Finance. New Employees are required to attend the New Employee Orientation (NEO) training conducted by central HR; once new employees report to their individual B&F departments the orientation procedures vary.

Many employees are not aware of how B&F operates and where they fit into the organization.

There is a need for an onboarding process at the B&F and departmental levels. Our research demonstrates a need for new employees to have a standard onboarding process which provides a line of sight that aligns UM, B&F and Department missions and values.

**Why do we need to improve these conditions?**

“Companies whose leaders focus on building bonds with their employees in first 90 days retain more employees during their initial period and tend to retain them longer overall”

*George Bradt, co-author – Onboarding: How to get your employees up to speed in half the time*

“Ninety percent of employees make their decision to stay at a company within the first six months”

*Aberdeen Group – Onboarding Benchmark Report 2006*
2. Analysis

An analysis of the existing conditions was performed which involved the following steps:

- Surveyed B&F employees hired within last 3 years
- Held focus groups with new hires
- Interviewed HR professionals internal and external to B&F
- Reviewed 2010 Employee Satisfaction Survey data
- Conducted a peer institutions survey

A root cause analysis confirmed current conditions lack standard onboarding guidelines and resources within B&F.

The following pages detail this analysis.
2.1. B&F new hire survey

A Zoomerang survey was sent to all B&F employees (452) hired within the last 3 years and 243 people responded. Demographics were:

- 177 Non-supervisor
- 42 Supervisor/manager
- 24 Bargained-for staff

There were 14 questions on the survey which focused on their onboarding experience. Many felt that they did not have a good understanding of how Business & Finance operates and only 69% said they were made aware of the Business & Finance mission and values - 43% of those actually knew the mission.

2.2. Focus groups with new hires

The team conducted focus groups with more than 50 new hires within B&F. We discovered that:

New Employee Orientation (NEO) is generally the first opportunity for employees to get introduced to the University and is well received

Onboarding exists in different forms across B&F and non-existent in some departments.

**GAP:** Little emphasis on sharing knowledge about UM, B&F and how a person fits in the ‘Big Picture’

**GAP:** Divisional Onboarding experience appears to be focused on high level departmental orientation
2.3. UM HR Professionals interviews

UM HR professionals were interviewed by team members representing both B&F and the academic units.
- 100% have a documented formal process in place and refer to it as an orientation
- Many departments consider NEO as their sole Onboarding process
- 88% feel it acclimates new staff, 12% did not respond
- 63% believe it works well, 37% did not respond

2.4. 2010 employee satisfaction survey data

Analyzed 2010 Employee satisfaction survey data

Focused on the climate dimension data
- “I am aware of Business and Finance values”
- “The Business and Finance values govern the way we do business in Business and Finance”
2.5. Peer institutions survey

Sixteen peer intuitions were surveyed regarding their onboarding process. Approximately 75% have some form of an onboarding program and a majority focus on mission, culture and vision.
3. Goals

A standardized process that will:

– Better acclimate employees in UM community and culture
– Provide an environment that accelerates higher performance
– Instill a sense of pride in employees as to why it’s great to work at UM
– Enable employees to understand where they belong within B&F and UM
– Help employees feel their contribution is valued and important to the University – *You Matter To Blue*

A simple, cost-effective, efficient and easy to adopt process

A ‘One-Stop’ Onboarding resource site for employees with:

– Information about UM and B&F
– UM and B&F missions, vision, goals and values
– Links to Org charts
– Other resource links

---

**The Objective**

- Better acclimate employees in UM community
- Provide an environment that accelerates higher performance
- Instill a sense of pride in employees as to why it’s great to work at UM
- Enable employees to understand where they belong within B&F and UM
- Help employees feel their contribution is valued and important to the University – *You Matter To Blue*
4. Recommendations

1. Create a B&F Onboarding resource site

2. Recommend that B&F sends out a welcome email to new employees. The email should contain:
   - Welcome message
   - Video by EVP/CFO explaining B&F [Tim 😊]
   - Link to the new resource site on B&F website
   - Missions, Vision and Values of B&F

3. Recommend that B&F provides checklists to departmental HR administrators to be used as part of Onboarding process:
   - Department Checklist
   - Supervisors Checklist
   - Employees Checklist

4. All departments should have departmental descriptions on their individual websites

5. Use the existing UMHR retention tool kit to re-engage employees with B&F mission, vision, goals and values

6. Provide an incentive to new employees to use this resource site

7. Encourage departments to improve communication and information sharing
   - Website
   - Wiki
   - SharePoint
   - CTools
   - Social networking tools
   - All Staff meetings
5. Implementation Plan

1. Identify project owner

2. Create project team to include departmental HR associates, central B&F HR, communication team, Senior Advisor to the EVPCFO

3. Finalize and activate website, checklists, social network tools, build a landing page that links to departmental org charts

4. Activate B&F email process

5. Identify and measure success from B&F employee satisfaction survey and add new 12-24 month demographic

6. Develop process to manage annual B&F onboarding Zoomerang survey for new employees and add questions specific to their onboarding experience

7. Identify recipient of survey data

8. Develop communication plan to:
   - Raise awareness re: retention tool kit usage
   - Encourage departments to update their departmental descriptions and org charts on websites
   - Employ technology to increase communication and knowledge sharing
   - Recommend departmental use of onboarding checklists
6. Measuring Success

- Metrics developed using:
  - Identified questions on employee satisfaction survey
  - New employee B&F Leadership Academy annual survey
- HR Retention data
- Number of hits to the new Onboarding web site indicate utilization of the resource
- Measure incentive program

Current data is the benchmark and subsequent data capture/analysis will assist in measuring progress and success.

7. Follow-up

Project owner is responsible for process and/or procedures to:

- Maintain website
- Maintain checklists
- Analyze B&F employee satisfaction climate dimension & new question survey data
- Measure success
Appendix
Onboarding at B&F

B&F new hire survey details

1. Currently, which best describes your current position?

<table>
<thead>
<tr>
<th>#</th>
<th>Answer</th>
<th>Response</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Non-supervisory position</td>
<td>177</td>
<td>73%</td>
</tr>
<tr>
<td>2</td>
<td>Supervisor/Manager</td>
<td>42</td>
<td>17%</td>
</tr>
<tr>
<td>3</td>
<td>Bargained-for Staff</td>
<td>24</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>243</td>
<td>100%</td>
</tr>
</tbody>
</table>

Statistic | Value
---|---
Mean    | 1.37
Variance | 0.43
Standard Deviation | 0.66
Total Responses | 243

2. How long have you been employed at the University of Michigan?

<table>
<thead>
<tr>
<th>#</th>
<th>Answer</th>
<th>Response</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1-3 months</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>2</td>
<td>3-6 months</td>
<td>11</td>
<td>5%</td>
</tr>
<tr>
<td>3</td>
<td>6-12 months</td>
<td>38</td>
<td>16%</td>
</tr>
<tr>
<td>4</td>
<td>1-2 years</td>
<td>83</td>
<td>34%</td>
</tr>
<tr>
<td>5</td>
<td>2-3 years</td>
<td>107</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>241</td>
<td>100%</td>
</tr>
</tbody>
</table>

Statistic | Value
---|---
Mean    | 4.17
Variance | 0.83
Standard Deviation | 0.91
Total Responses | 241

Complete report available by email BFLA2010OnBoardingProject@umich.edu
# UMHR Professionals – Survey Results

<table>
<thead>
<tr>
<th>Area of Focus</th>
<th>Department A</th>
<th>Department B</th>
<th>Department C</th>
<th>Department D</th>
<th>Department E</th>
<th>Department F</th>
<th>Department G</th>
<th>Department H</th>
<th>Department I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Do you have a formal process in place for new hires?</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>N/A</td>
</tr>
<tr>
<td>2 What do you call this process?</td>
<td>New Employee Orientation - bi-monthly 2 hour sessions</td>
<td>NEO</td>
<td>Plant operations orientation</td>
<td>N.E.O. &amp; ITS</td>
<td>Orientation Check list for Managers</td>
<td>New Employee Department orientation</td>
<td>New Employee Orientation</td>
<td>N. E.O.</td>
<td>N.E.O.</td>
</tr>
<tr>
<td>3 Is this process documented?</td>
<td>Yes, on line</td>
<td>Yes</td>
<td>yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes -On-line</td>
<td>Yes - on line</td>
</tr>
<tr>
<td>4 If so, may we have a copy?</td>
<td><a href="http://www.lsa.umich.edu/facstaff/hr/hiring/neo">http://www.lsa.umich.edu/facstaff/hr/hiring/neo</a></td>
<td>Yes</td>
<td>Power point</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>5 If not, what does it entail?</td>
<td>NA</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>Check list and task list</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>6 How long has it been in place?</td>
<td>at least 10 years</td>
<td>10+ yrs.</td>
<td>?</td>
<td>?</td>
<td>?</td>
<td>14yrs.</td>
<td>10 yrs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 How has it worked for you? (Intentionally open ended on)</td>
<td>Well. They have a post-orientation Zoomerang survey and results always favorable and many ask for it to be longer</td>
<td>So far it has been good, however it could use some improvement.</td>
<td>We have had an excellent response from both new hires and supervisors</td>
<td>Well so far, it provides a point of reference for our new employees and supervisors</td>
<td>?</td>
<td>It is a comprehensive session that I feel works very well</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Has this process helped to acclimatize new hires?</td>
<td>Yes, understand accountability is part of YE evaluations</td>
<td>N/A</td>
<td>I believe it has done a good job</td>
<td>Yes</td>
<td>N/A</td>
<td>Absolutely</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Has it impacted productivity? How?</td>
<td>Not sure. They are thinking about 3 month interviews to see how it’s are going</td>
<td>We have never measured this</td>
<td>N/A</td>
<td>We have not measured it.</td>
<td>N/A</td>
<td>Individual departments would be better equipped to answer that, I would think so</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2010 B&F Employee Satisfaction Survey
Climate Dimension Detail

<table>
<thead>
<tr>
<th></th>
<th>FVP CFO 11 Employees</th>
<th>F&amp;O 1445 Employees</th>
<th>Finance 373 Employees</th>
<th>Investment Office 15 Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Blank</td>
<td>&lt;12 Mths</td>
<td>1 - 5 Years</td>
<td>6 - 10 Years</td>
</tr>
<tr>
<td>I am aware of the Business and Finance values</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
<td>100%</td>
</tr>
<tr>
<td>The Business and Finance values govern the way we do business in Business and Finance</td>
<td>20%</td>
<td>70%</td>
<td>20%</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>IT5 545 Employees</th>
<th>Other 52 Employees</th>
<th>UHR 247 Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Blank</td>
<td>&lt;12 Mths</td>
<td>1 - 5 Years</td>
</tr>
<tr>
<td>I am aware of the Business and Finance values</td>
<td>72%</td>
<td>75%</td>
<td>73%</td>
</tr>
<tr>
<td>The Business and Finance values govern the way we do business in Business and Finance</td>
<td>60%</td>
<td>75%</td>
<td>60%</td>
</tr>
</tbody>
</table>
### Do you have a formalized on-boarding program?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>73.3%</td>
<td>11</td>
</tr>
<tr>
<td>No</td>
<td>26.7%</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>

answered question 15
skipped question 1

### If yes, how long has been the program in place?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>11</td>
</tr>
</tbody>
</table>

answered question 11
skipped question 5

### Response Text

- 3 to 5 years: 1
- 5+ to 10 years: 5
- 10+ to 15 years: 3
- 15+ years: 1
- many years: 1

### Which of the following are covered as part of the on-boarding process?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>University/College overview including mission and goals</td>
<td>100.0%</td>
<td>11</td>
</tr>
<tr>
<td>Departmental missions and goals</td>
<td>27.3%</td>
<td>3</td>
</tr>
<tr>
<td>Organizational orientation</td>
<td>90.9%</td>
<td>10</td>
</tr>
<tr>
<td>Customer overview</td>
<td>36.4%</td>
<td>4</td>
</tr>
<tr>
<td>Work planning</td>
<td>9.1%</td>
<td>1</td>
</tr>
<tr>
<td>Training requirements</td>
<td>27.3%</td>
<td>3</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
<td>11</td>
</tr>
</tbody>
</table>

answered question 11
skipped question 5
Onboarding at B&F

Business & Finance On-Boarding Recommendation

Brief History
- Currently, there is no "official" on-boarding process within Business & Finance (B&F).
- Each year on average 180 new employees are hired within Business & Finance. New employees are required to attend the New Employee Orientation (NEO) training, since new employees report to their individual B&F department the orientation procedures vary.
- Many employees are not aware of how B&F operates and where they fit into the organization.

There is a need for an on-boarding process at the B&F and departmental levels. Our research demonstrated a need for new employees to have a standard on-boarding process which provides a line of sight that aligns B&F and department missions and values.

Current Condition
- An employee is hired at the University of Michigan and into B&F.
- They attend a 1.5 day training session called NEO and learn about the University, Parking, Benefits, Unemployment, ID Card, etc. After the 1.5 day training session, they report to their individual department supervisor. Some departments then send new hires to a high level Dash Group orientation and some do not.
- Based on interviews with 10 HR professionals both internal and external to B&F regarding their on-boarding process, there are inconsistencies in communicating the B&F vision, mission and values.
- Based on our survey of 234 new B&F employees within the last three years 50% indicated that they did not have a good understanding of how B&F operates.

Goal
- Create a process to welcome and educate new employees to Business & Finance.
- Provide the employee information about B&F, mission, values, and how their job within their department fits into the overall line of sight.
- Keep the process simple, cost-effective, efficient and easy to adopt.

Recommendations
- Create a B&F on-boarding resource site
- Recommend that B&F sends out a welcome email to new employees. The email should contain:
  - Welcome message
  - Video by EVP/CFO explaining B&F
  - Link to a new on-boarding resource site on B&F website
  - Mission, Vision and Values of B&F
  - Leverage Social Media Tools
- Recommend that B&F provide checklist to departmental HR administrators to be used as part of on-boarding process:
  - Department Checklist
  - Supervisors Checklist
  - Employees Checklist

Root Cause
- We conducted a broad study of all employees hired within the last three years followed by a more detailed discussion with focus groups of employees hired within the last 18 months. The study also included a review of existing on-boarding processes within B&F.
- A root cause analysis of the current condition indicates a lack of standard on-boarding guidelines and resources within B&F.

Analysis
- Focus Group Findings:
  - 45 new employees hired within the last 18 months attended.

B&F New Employee Survey
- Our group survey to 234 new employees to B&F told us that 36% of new employees said they were not aware of how B&F operates. Also 69% of the people indicated they knew the B&F mission; however, when surveyed, only 58% picked the correct mission statement.

Interviews with HR Professionals
- Interviews with units around campus both internal and external to B&F, that there is an orientation on-boarding at the high level department group - but very little on-boarding exists at the department and/or supervisor level. Some units/supervisors may have a personal check list but it is not consistently shared.

- 100% have a documented formal process in place and refer to it as an orientation
- 75% have this process in place for 10 years or longer (25% are unsure of duration)
- 88% feel it accomplishes new staff (22% no response)
- 6% believe it works well (2% no response)

Peer Institution Survey
- Peer institutions were surveyed on the usage of a formal on-boarding process and 16 institutions responded:
- 75% have some sort of on-boarding program
- Integration have been in place for 5 - 15 years
- Majority of these programs focus on University's mission, culture, vision, organizational orientation, benefits and legal compliance.
- Power point presentation is the common tool used to conduct this process.
Welcome to Business & Finance at the University of Michigan

A Quick Guide for Getting Onboard

The Business & Finance (B&F) division includes more than 30 service areas that report to Executive Vice President and Chief Financial Officer (EVP/CFO) Timothy Slottow to provide services essential to supporting the students, faculty and staff of the University of Michigan. We pride ourselves on our deep technical and business expertise, our commitment to understanding the university’s functions, and filling our role as stewards of the human, financial, facilities and information resources of the University. In partnership with staff across the university, we truly “Make Blue Go.”

B&F departments include:

- **Facilities & Operations** - responsible for the stewardship of the university’s physical properties, environmental stewardship and regulatory compliance
- **Finance** - responsible for central financial and treasury functions.
- **Information and Technology Services** - responsible for technology and communications services, administrative computer systems and IT security.
- **Investments** - responsible for protecting U-M endowment assets in support of the university’s missions of teaching, research and service.
- **University Human Resources** - responsible for delivering services that attract, sustain and inspire excellence in faculty and staff.

For information about the B&F Strategic Framework, Mission and Goals, visit: http://www.bf.umich.edu/strategicframework.html

About the University

A World-Class Research University

U-M is a world-class research university with three campuses (Ann Arbor, Flint and Dearborn), more than 38,000 students, an exceptional health system, great schools, colleges, museums, beautiful natural areas and a robust arts community. More>>

Work Culture

The Michigan culture is known for engaging faculty and staff in all facets of the university to create a workplace that is vibrant, stimulating, and fulfilling. When the Chronicle of Higher Education published its survey of the best colleges and universities to work for, the University of Michigan was on the list for the third consecutive year. Received high marks for confidence in leadership, job satisfaction, and work-life balance, among others. More>>

History & Leadership

Founded in 1817, U-M is the oldest of the 15 public universities in the state of Michigan. Leadership is provided by President Mary Sue Coleman and Provost Philip J. Hanlon, a team of executive officers and the deans of the schools and colleges on all three campuses.

Top Ranked

The University of Michigan is a global leader in health, law and public policy, the arts and humanities, science and technology, and many other academic disciplines. The essence of Michigan is the academic diversity of our schools and colleges, many of which are ranked among the best in the country.

About Ann Arbor

Plus, whether you work or live here, there’s really no other place like Ann Arbor. A distinguished arts environment, fine dining, bookstores for all tastes, exceptional public schools, and a diverse range of perspectives all combine to create a unique community. Here are some other resources to help you get acquainted with B&F and the U-M:

U-M Resources

- University of Michigan Gateway website
- University Human Resources – Visit the Manager’s Toolkit and Resources for Staff links
- U-M New Employee Orientation
- New Employee Orientation Video – Infinite Possibilities: An exceptional place to learn, work and discover

Business & Finance Resources

- Organizational Charts by B&F department
- B&F Leadership Academy - The B&F Leadership Academy focuses on developing the leadership competencies and capacities necessary for future senior leaders in Business and Finance.
- Helpful information for new hires (Employee Checklist) - with brief explanatory statement (doc in development by Leadership Academy Onboarding team)
- Helpful information for hiring departments within B&F (Department onboarding checklist) - with brief explanatory statement (doc in development by Leadership Academy Onboarding team)
- Helpful information for managers and supervisors (Supervisor onboarding checklist) - with brief explanatory statement (doc in development by Leadership Academy Onboarding team)
Proposed welcome email from EVPCFO (to be sent to new employees on first day of the job)

Subject: Welcome to Business & Finance at the University of Michigan

Dear Employee: Welcome to Business & Finance. The Business & Finance (B&F) division includes more than 30 service areas that report to Executive Vice President and Chief Financial Officer (EVPCFO) Timothy Slottow to provide services essential to supporting the students, faculty and staff of the University of Michigan. We pride ourselves on our deep technical and business expertise, our commitment to understanding the university’s functions, and filling our role as stewards of the human, financial, facilities and information resources of the University. In partnership with staff across the university, we truly “Make Blue Go.”

This onboarding hyperlink contains lots of information about the U of M and B&F, and where your own department fits into the overall B&F structure. It also has a welcome video from me and other B&F staff - Receive a **FREE U of M Shirt** if you read and click all the hyperlinks!

The below are the goals, mission, vision and values here in Business & Finance.

**Goals:** Being a provider of choice, employer of choice and best in class leadership.

**Mission:** We partner with the University community to provide the technical, financial, physical, and information and human resource infrastructure essential to being a great public university of the world.

**Vision:** We will become a high-performance organization by: (1) Being known for our deep expertise (both technical and business) (2) Demonstrating (via assessment and service) our understanding of the University’s businesses (3) Serving as fiduciaries of the University assets (physical, financial, human, information and technology assets)

**Values:** Respect and Diversity, Ethics and Integrity, Innovation, Collaboration, Professional Growth and Development, Quality and Customer Service, Health, Safety and Environment and Community

We are excited to have you here and know together we can help the University meet its mission to serve the people of Michigan and the world through preeminence in creating, communicating, preserving and applying knowledge, art, and academic values, and in developing leaders and citizens who will challenge the present and enrich the future. Welcome aboard!
Business & Finance
Department
On-Boarding Checklist

Department Overview
  Org Chart - departmental detail w/photos (optional)
  Description of departments within B&F
  Department Strategic Plan
  Department mission & values, if applicable

Policies and Procedures/Access
  Departmental Policies
  Departmental Procedures

Administrative/Housekeeping Items
  Map/seating chart (key plans)
  Workstation Setup
  Send welcoming message before first day
  Department Orientation (lunchroom, supply cabinet, bathrooms, etc)
  Office Tour
  Building Emergency Plan

Access/Training
  Access and Compliance forms
  MToken
  M1 - access (OARS)
  Departmental systems
  Conflict of Interest (COI/COA)

On-Boarding Follow Up
  6 Month Review – Conduct Retention Interview (www.hr.umich.edu/retention)
On-Boarding at B&F

Business & Finance
Employee

On-Boarding Checklist

Wolverine Access – http://wolverineaccess.umich.edu/index.jsp
Email account and password
Dept IT - computer functioning first day
Security access/ M1 form
Business Card
Office/Desk name plaque
MCard
Department and customer phone list
Work place rules
Work Hours/Reporting time to work site
Overtime Policy
Vacation Policy/ how to request
Workstation:
  Desk
  Ergonomic chair and equipment
  Computer
  Phone/Voicemail
  Office supplies
  Cabinet shelves
  Lighting
  List of Acronyms
  Phone list
Job/work responsibilities/work planning:
  Job description/expectation
  Individual work plan/goals
  Department or work group work plan
  Probationary period – and associated performance plan
  Department and/or work group Performance Evaluation plan
  Expected competencies
  Ongoing projects and imitative overview
  Mentor or Shadow someone
Keys required for your work and access to work place.
Campus Tour by supervisor
Job Specific Tour – work area and buildings
Emergency plans – building
Parking – at job site/options
Parking & transportation – Campus http://pts.umich.edu/
Phone if work responsibilities require
Department Organizational Overview
  Org Chart
  Description of departments within B&F dept
  Department Strategic Plan
  Map/office & seating chart
  Department goals mission & values
  Definition of department customer service
  Identify customers & contacts
  Departmental Policies
Business & Finance Supervisor
On-Boarding Checklist

Department Overview
- Org Chart - departmental detail w/photos (optional)
- Description of departments within B&F dept
- Department Strategic Plan
- Map/seating chart
- Department mission & values, if applicable
- Identify customers & contacts

Job Expectations
- Job description/expectation
- Individual goals/ work plan
- Discuss Probationary period
- Performance Evaluation
- Mentor or Shadow someone
- Discuss relevant timelines (projects, learning curve)

Policies and Procedures
- Departmental Policies
- Departmental Procedures
- Security access/ M1 form before start date
- Dept IT - computer functioning first day
- Vacation Policy/ how to request
- Overtime Policy
- Reporting Time to Work Site
- Standard Practice Guide - S.P.G.

Administrative/Housekeeping Items
- Workstation Setup
- Send welcoming message before first day
- Keys
- Phone list
- List of Acronyms
- Phone, voicemail, computer, workstation
- Business Cards
- Name badge
- Work Hours
- Department Orientation (lunchroom, supply cabinet, bathrooms, etc)
- Office Tour
- Emergency Plans Building
- Parking at job site

Access/Training
- Access and Compliance forms
- MToken
- M1 - access
- Departmental systems
- Conflict of Interest (COI/COA)

On-Boarding Follow Up
- 6 Month Probationary Review – Conduct Retention Interview (www.hr.umich.edu/retention)
Proposed landing page design for all org charts
YOU matter to BLUE

University of Michigan
2010 Business & Finance Leadership Academy

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