

OBH Onboarding: Design and Implementation

Louisiana State Civil Service Workforce Summit
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OBH Onboarding

- Onboarding Defined
- Why Onboarding?
- Onboarding Program Design and Pilot
- Implementation
- Lessons Learned
- Program Successes and Best Practices
- Offboarding
- Q&A

“Onboarding is a supported process through which new employees gain knowledge and build relationships with the goal of quickly and successfully integrating into OBH.”

Why Onboarding?

- New hires understand role within agency
- Faster integration into agency structure
- Provides clear knowledge of team members
- Caters to emotional and psychological needs
- Facilitates interpersonal connections and relationship building
- Promotes understanding of agency mission, values, beliefs, habits, attitudes, and norms
- Builds a shared culture

Program Design and Pilot

1. Assign OBH Liaison
2. Initial Survey
3. Task Force Created
4. Onboarding vs. Orientation
5. Information and Resource Gathering
6. Identification and Development of Missing Pieces
7. Organize Resources into a Time-based Program
8. Role Development

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- Ambassador
- Human Resources Liaison
- Logistics Coordinator
- Onboarding Coordinator
- Safety and Emergency Preparedness Coordinator
- Supervisor
- Training Coordinator

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- Created for each of the onboarding roles
- Arranged chronologically and include activities and information conveyed
- Used as guide to ensure all tasks are completed
- Onboarding best practice

Training Coordinator Checklist Example

Pre-Employment:

- Pull ZMDSHEET and Training Transcript (if previous state employee)
- Prepare customized training plan
- Subscribe employee to applicable CPTP training program

Week One:

- Provide a copy of this checklist to the employee
- Discuss the role of the Training Coordinator
- Discuss customized training plan
- Administrative Staff Only – Assign LEO Time Administration Courses (must be completed prior to assuming time administrator duties)
 - LaGOV HCM Basic Navigation (prerequisite course) – WBT
 - LaGOV HCM Basics of Time Administration – WBT

- Mandatory LDH training requirements
- Travel Work Center Training in LEO for travel reimbursement
- Cubicle Etiquette web-based training course in LEO
- Cubicle Etiquette
- State Civil Service CPTP videos (<https://www.youtube.com/user/LAStateCivilService>)
 - LEO Booking a Web-based Course
 - LEO Who do I contact for Help?
- LEO My Training Quick Reference

Follow-Up:

- Prepare and send notice of training orientation to supervisor

Logistics Coordinator Checklist Example

Pre-Employment (when interviews commence):

- Obtain Fiscal Operations Request for Dial Tone or Equipment form from Supervisor with assigned cubicle/office
- Clean and prepare cubicle or office
- Provide basic office supplies
- Request telephone line and provide telephone number, temporary password, and voicemail instructions on desk
- Leave OSB Facilities Manual on desk
- Leave Fiscal Operations contact card on keyboard
- Set up computer and printer (if available)
- Ensure office furniture keys are available

Pre-Employment (when name is confirmed):

- Update Fiscal Operations Request for Dial Tone or Equipment form with employee's name
- Complete and affix cubicle name sign
- Request computer-related access from IT
 - Email
 - Lync
 - K: drive (request addition to OBH-HQ security group)
 - ISIS/LaGov if requested by supervisor
 - Other software as requested by supervisor
- Provide supervisor with email address, username and temporary password for computer
- Request Sharepoint and secure email access from HPM designee
- Update OBH telephone directory and send link via email to office staff
- OBH telephone directory on desk

New Employee Checklist

After your first month at OBH, you should know...

About Your Job and Work Environment:

- How OBH is organized
 - OBH's goals and mission
 - Specific functions of your section/unit
 - To whom you report
 - Your duties and responsibilities
 - Your scheduled work hours and days
 - Your scheduled lunch breaks and breaks and if they are flexible
 - The performance expectations for your position
 - The length of your probation period (if classified)
 - How performance planning and evaluation is managed, by whom, and how often
- Your supervisor's expectations regarding attendance and tardiness
 - The procedure for requesting time off and reporting absences
 - When staff meetings are held
 - How you will be trained and by whom
 - Career development opportunities available
 - What training you are expected to complete
 - The safety requirements of the job
 - Your role in emergency preparedness and response
 - How to access information on LDH and OBH policies and procedures
 - The benefits, services and resources available to you and your family
 - The appropriate use of confidential information

New Employee Checklist, cont.

About Your Job and Work Environment:

- Your colleagues and their job functions
- How to sign into LEO
- How to access training information on LEO
- Your assigned work area and the office furniture and supplies you will be issued
- How to initiate a Help Desk request
- How to use the phone systems and e-mail
- How to schedule a meeting in Outlook
- How to use and locations of printers, copiers, scanners, fax machines
- Procedure for making long-distance phone calls
- How to access the LDH intranet
- The location of restrooms, fire exits, and break rooms
- The procedures for work-related travel
- The rules for after-hours access to your work area

- How to obtain/order office supplies or other tools or resources
- The location of policies and procedures on the Z: drive

About Your Pay:

- Your rate of pay
- How overtime is managed
- The time recording procedure for your area
- State holidays and pay periods
- How to obtain pay statements
- Travel and reimbursement procedures
- Annual and sick leave accrual rates
- Leave and attendance policies
- How to update your bank information

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9. Checklist Development
10. Role Assignment and Training
11. Deployment of Test Run

Implementation

1. HR Liaison kicks off onboarding with an email
2. Onboarding Coordinator informs key staff
3. Onboarding role-keepers work their checklists
4. Onboarding has started!

Lessons Learned

- Cultural shifts take time
- Dedicated Onboarding Coordinator
- Staffing constraints
- HR takes the lead

Program Successes / Best Practices

- Improved communication and collaboration
- New hires have the tools to begin work right away
- Checklists
- Common network folders
- Development of agency Training Coordinator

Offboarding

- Just like onboarding, but in reverse

It's Your Turn

- Engage your HR team from the start
- Select an enthusiastic Onboarding Team
- Create an Onboarding Coordination function
- Develop a model based on your agency's vision
- Float the idea agency-wide
- Find resources
- Just do it!

Questions?

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