New Team Member Checklist

EMPLOYEE INFORMATION

Name:	Start date:
Position:	Manager:

FIRST DAY(s)

Review

- ☐ Organizational Chart
- ☐ Location of Branches
- ☐ Confidentiality Policy
- ☐ Dress code
- ☐ initial Employment Period
- ☐Performance expectations and typical schedule
- ☐ Initial job assignments and training plan

Action Items

- ☐ Introduce to staff
- ☐ Upload introduction to staff member on Staff Intranet
- ☐ Demonstrate how to access e-mail
- ☐ Provide keys
- ☐ Provide name badge
- ☐ Demonstrate how to use Kronos
- ☐ Add to appropriate distribution and email lists
- ☐ Assign locker or cubby for personal items

Tour

☐ **Branch Tour**

- Employee's workspace
- Staff Offices
- Office Equipment such as copy machines, printers, fax machines, etc…
- Office Supplies Storage Areas
- Break Rooms
- Mail Area
- Restrooms
- Service Points
- Library Collections
- Emergency exits, first aid kits and fire extinguishers
- Parking

Forms to Complete

☐Employee Conduct Agreement
- Sign, date, forward to Deputy Director

☐Job Description
- Sign, date, forward to Deputy Director

☐Customer Service Standard
- Sign, date, forward to Deputy Director

☐Emergency Contact
- Add to Branch Emergency Contact list on M:drive under Human Resources-Management/Emergency Phone Contacts

☐Customized Feedback Form
- Keep in supervisor file

FIRST MONTH

Schedule Meetings with Administration and Other Staff as Appropriate:		
☐Executive Director	☐Finance Manager	☐Facilities Manager
☐Deputy Director	☐Community Engagement Manager	☐IT Manager

☐Collection Development Manager ☐Technical Services Manager ☐Mailroom Clerk	☐Marketing Specialist ☐Safety Officer ☐Central Manager	☐Local History & Genealogy Manager ☐Administrative Associates
Review from Employee Handbook:		
☐Personal, Casual, and Vacation Leave ☐Extra Hours ☐Breaks ☐Holidays ☐Employee Conduct	☐ Mission and Strategic Plan ☐Discipline & Grievance Procedures ☐Harassment ☐Problem Resolution Procedure	☐Employee Assistance Program ☐Travel and Meetings ☐Staff Reorganization or Reassignment ☐Performance Evaluation
Phone: ☐ How to Use ☐ Voicemail		

MONTHS 2-3

Emergency Procedures

☐Emergency Manual ☐Emergency Closings

☐**Review from BCL Website**

- About the Library
- Support
- Catalog
- Kids/Teens/Adults
- Books, Movies, & More
- Research
- Services

☐**Review from SharePoint**

- Collections
- Handbook
- Training Materials
- Committees
- Staff Directory
- Helpful Links

☐**Continuing Education Opportunities**

- Brown County Library
- Nicolet Federated Library Systems (NFLS
- Wisconsin Library Association

ON-BOARDING TOOLKIT:

The BCL Managers Guide to New Employee Orientation

Administration:Human Resources: OnBoarding: OnBoarding ToolKit

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WHAT IS ONBOARDING?

Onboarding is the practice of how a new employee is introduced to your organization. It helps them quickly become familiar with the various aspects of their job from policies and procedures to forms and culture. We want to be sure we are setting up all new employees for success! This toolkit contains information to help you work with your new employee and provide a consistent way to introduce all new employees to their roles within Brown County Library.

PREPARING FOR THE FIRST DAY

Preparing for your new employee should begin once they accept their new role. There are a number of things that we must do to ensure they have the tools to be successful. The following list contains tasks that should be completed prior to your new employee's first day. Please remember the shorter the turn-around time between a candidate accepting their new position and starting at Brown County Library, the less time we will have to complete all the necessary pieces. Because of the variety of staff involved in preparing for a new employee, there may be times when all of these pieces cannot be completed prior to your new employee starting. You may need to be flexible and restructure the order of some of these tasks if they are not ready before your new employee starts.

Brown County and Library Administration Preparations

The following tasks are initiative by Library Administration and will begin when an offer is officially accepted:

- Email account created (Admin/DOTS/BC HR)
- Kronos account created (Admin/DOTS/BC HR)
- Access to shared drives granted (Admin/DOTS/HR)
- County software access granted (Admin/DOTS/BC HR)
- Access to Milestone, if appropriate (Admin/DOTS/BC HR)
- Assign a YubiKey (Admin/DOTS)
- Phone line set up (Admin/DOTS/BC HR)
- Name tag ordered (Admin)
- Business cards ordered, if appropriate (Admin)
- Add to Teams and Teams Meetings for All Staff (Admin)

Department/Branch Preparations

You will be responsible for coordinating the following tasks for your new employee prior to their start date:

- Set up access to Workflows (if appropriate).
- Obtain keys.
    - If your location has fob access, use an unassigned fob and swipe it in front of a reader. Contact the Library Facilities Manager with the date/time of the swipe and who you would like the fob assigned to. If you need additional fobs, contact the Library Facilities Manager.
    - If keys are needed for your associate level staff or higher, contact the Library Facilities Manager to request a key.
- Label new employee mailbox.

- ☐ Identify work space for the new employee. Ensure this space is clean and ready for them to move in. Provide office supplies such as paper, pens, post-it notes, and other needed items.
- ☐ Send email to immediate department or branch regarding the new team member and their start date.
- ☐ Identify a department or branch mentor (see Assign a Mentor for more information).
- ☐ Provide a welcome for the new team member. This could be a card signed by all the team members, a welcome sign on the desk, or treats. Be creative but respectful.
- ☐ Add the new staff member to appropriate email distribution lists or calendars.
- ☐ Reserve time on your calendar to work with your new employee for the first few weeks. It is crucial that you set aside time to work directly with your new employee as this sets the tone for how available they perceive you. You want to establish respect and trust early in your working relationship. You should also include monthly meetings with the new employee to address any questions or concerns they may have as well as any issues you would like to discuss in these first few months of employment.
- ☐ Create a first week schedule for the new employee. This schedule should include training time, time with their mentor, time to shadow other staff, meeting time with you, as well as some time to explore their new work environment on their own.
- ☐ Set up appointments with individuals that your new employee should meet with early on. Each new employee should meet with all members of the Administrative Team as well as the Central Manager. Arrange meetings with the following:

☐ *Executive Director*	☐ *Deputy Director*	☐ *Finance Manager*
☐ *Community Engagement Manager*	☐ *Facilities Manager*	☐ *IT Manager*
☐ *Collection Development Manager*	☐ *Mailroom Clerk*	☐ *Administrative Associates*
☐ *Central Manager*	☐ *Safety Officer*	☐ *Local History & Genealogy Manager*
☐ *Technical Services*	☐ *Marketing*	

Manager *Specialist*

Information Included in New Hire Packet

This following information has already been shared with your new employee prior to them starting. Some of these items you will review with them again when they start work as detailed further in this toolkit.

- Orientation date with County (typically included in their offer letter). The following information is covered in that meeting:
  - Employee Assistance Program
  - Employee Information and County policies
  - Bloodborne Pathogen process
  - Harassment
  - Safety
  - Benefits
  - Medical, dental, vision, etc.
  - Deferred compensation
  - WRS/Life Insurance
- HR Paperwork
  - I-9
  - W4
  - Direct Deposit Form
  - Emergency Contact
- County Policies
  - Information Technology Usage
  - Sensitive Information Policy
  - County Vehicle Management
- Brown County Library Information
  - Organizational Chart
  - Dress Code
  - Parking
  - Overview of BCL
  - Mission and Strategic Plan
  - Confidentiality

- Conditions of Employment

ASSIGN A MENTOR

A mentor helps acclimate the new employee to their role and team. You will need to ensure that both the employee and the mentor have time to meet on a regular basis in the first few months of employment. Selection of a mentor is very important. You want to make sure your mentor is knowledgeable about policies and procedures, has a positive attitude, embodies the values of Brown County Library, and is comfortable serving in this role. They will be a critical part of the employee's on-boarding experience as they will act as a resource in helping the employee learn and adapt to our work culture. You may want to work with the mentor to assist in other aspects of onboarding such as training on emergency procedures, overview of the phone system, or providing a tour of the department/branch. Be sure the mentor understands your expectations of the training topics that you have assigned to them. Remember, a mentor assists but they do not replace the role of the supervisor in the onboarding process.

- ☐ Meet and greet (ideally first day)
- ☐ Have lunch and/or breaks with new staff members
- ☐ Explain use of refrigerator, microwave, and expectations for cleaning
- ☐ Explain how and what to recycle
- ☐ Introduce to other members of the team
- ☐ Answers questions
- ☐ Check in regarding how the employee is acclimating

NEW TEAM MEMBER CHECKLIST

The New Team Member Checklist is intended as an overview of the information contained in this document. It is not intended as a stand-alone training tool. As you work with your new employee covering the various topics on this checklist, you will mark them off. Once completed, you will return the form to the Deputy Director. Ideally this document should be completed within the employee's three months.

FIRST DAY(S)

Although you have most likely met your new employee prior to their first day, it is essential to create a good "first" impression. How you meet them on their first day, the cleanliness of the environment, friendliness of the team, and preparedness that you demonstrate will all add to their perception of their job and the organization. This first day should be spent going over information to help them understand some of the more important policies and procedures. Remember, they are beginning a new job with new people and new ways of doing things. While you might be anxious to train them on how to do the tasks related to their job, you need to take time in the first few days to set the expectations you have as a supervisor, as well as define the role they will play in the organization.

Although the employee received information about BCL prior to starting, it is good to review this information in person. This provides an opportunity for you to answer questions they may have and to clarify any misunderstandings about this information.

The following areas should be discussed on the first day(s):

- Organizational Chart
  - Describe the various roles in the organization and how your new staff member might interact with those roles.
- Location of Branches
  - Provide an overview of each department and branch.
- Confidentiality Policy
  - Provide examples of how this person might need to enforce this policy both at work and at home. Examples include:
    - *Local law enforcement may visit the library looking for an individual. Legally we are not to permitted to disclose that information to them. Officers are welcomed to walk through the building looking for the individual.*
    - *When taking registration for a program or event, it is important that information is not shared with others. A sign-up sheet should not be left out for attendees; we cannot disclose to someone if a specific individual is also signed up for a program.*
    - *We can not share information about a customer's borrowing history unless they have the card in hand. With the card we are assuming that the card owner knows who is in possession of it.*
    - *We cannot tell a customer the names of other people who have a hold on a book or who has a book checked out.*
    - *When calling the library, customers should have their library card number, if they do not we can look their card up but should be careful about how much information is shared. You can place a book on hold and renew items without sharing titles.*
    - *Customers may pay a fine for someone else, but may not be given a receipt as that has identifying information on it.*

- Dress Code
  - Refer to the handbook on our Policies folder on SharePoint. Be sure to discuss the more nuanced areas listed under the general policy. Answer questions they may have.
- Initial Employment Period
  - All staff have a 6-month initial employment period where they are provided training and support, as well as feedback on how they are doing. You will provide further information about evaluations later.
- Performance expectations and typical schedule
  - Review what their typical schedule will be and any weekend rotations they may need to assist with.
  - How will the employee typically spend their day? Do you expect them to check in with you each day? Who should they go to with questions? This is your time as a manager to set the tone for your expectations of their work.
  - They may have questions about using leave. While this is covered later in the training, it may be beneficial to provide a brief overview at this time.
- Initial job assignments and training plan
  - Explain what they will be responsible for doing in the first weeks and months of their employment. You may increase duties as they progress in their learning, however they will want to know what they should focus on learning *first*.
  - Discuss how you will provide training. Be cognizant of the variety of learning styles. Not all employees are comfortable learning in the same way. Be sure to provide written training when possible as well as time to shadow, and time to work hands-on.
- Introductions to staff
  - Formally introduce your new team member to all staff in the department or branch.
- Take a photo of the employee for the Staff SharePoint portal. *This should be posted within the first 2 days of their employment with information about the new employee's position, location, and something about their hobbies or interests.*

- Access to e-mail and how to use a YubiKey
  - Show the employee how they can access their e-mail. Discuss when it is appropriate for them to use e-mail and how often you expect that to check it. Ideally all staff should read e-mail at least once per shift.
- Demonstrate how to access and use Teams
- Keys
  - Explain when and how they can access the building.
  - Key Card Access form (on SharePoint documents- System Wide- Human Resources- Onboarding)
- Name badge
  - Employees are expected to wear a name tag at all times.
- Kronos
  - Refer to SharePoint section on Timecards.
  - Provide training on how to login to Kronos. Guides for Kronos can be found on the Staff Intranet under the Training Materials tab - General - Kronos.
  - To be added to the time clock at Central, the department manager in Customer Service, Reference, or Youth Services can set up access.

Tours

All new employees should get a tour of their home location within the first day or two. Tours should include:

- Employee’s workspace
- Staff Offices
- Office equipment such as copy machines, printers, fax machines
- Office supplies
- Storage areas
- Break rooms
- Mail area
- Restrooms
- Service Points

- Library Collections
- Emergency exits, first aid kits, fire alarms, fire extinguishers
- Parking

All new employees should also receive a tour of Central. Tour of Central should include: overview of meeting spaces and auditorium, bookmobile, garden, various collections, especially those specific to Central, as well as 3rd floor businesses, technical services, local history, and the administrative offices.

Forms to complete **(found on SharePoint- System Wide: Human Resources Staff: Onboarding)**

- Employee Conduct Agreement
  - Sign, date, forward to Deputy Director.
- Job Description
  - Sign, date, forward to Deputy Director.
- Emergency contact
  - Make a copy for your file and then forward the original to Deputy Director.
- Provide employee Customized Feedback form to complete and return to you within the first month.
- Customer Service Standards
  - Sign, date, forward to Deputy Director.
- Key Card Access form (covered in pervious section)

FOR REVIEW IN THE FIRST MONTH

There are a number of resources to help your new employee feel more comfortable in their role. SharePoint has an entire section devoted to training materials for your new employee as well as documents for you to use as a manager to assess their work and provide appropriate coaching and feedback.

All staff have access to the ***Employee Handbook*** through SharePoint. There are some areas that should be discussed in person with the new employee to ensure understanding. During the first month, you should review the following areas with them:

- ☐ Personal, Casual, and Vacation Leave
    - Show the employee how to request leave. You should also explain how you would like flex time requested.
- ☐ Extra Hours
- ☐ Breaks
- ☐ Holidays
- ☐ Employee Conduct
- ☐ Discipline & Grievance procedures
- ☐ Harassment
- ☐ Problem Resolution Procedure
- ☐ Employee Assistance Program
- ☐ Travel and Meetings
- ☐ Staff Reorganization or Reassignment
- ☐ Performance Evaluation
    - Refer to the Human Resources Staff folder on SharePoint. This contains an Evaluation folder that will provide examples of all forms. Ensure the employee understands the initial employment period includes a 2-month review, and a 4-month review, and upon successful completion, an initial performance plan.

    - Evaluation are done annually in the fall.
    - Discuss pay incentives.
    - Review Performance Improvement Plan.
- Encourage your new employee to review all policies SharePoint.
- Mission and Strategic Plan
    - This is a good opportunity to review the mission and strategic plan with your new employee. Ask them what role they play in this. You can then confirm their understanding or help them look more broadly at how each position plays a part in fulfilling our mission and strategic plan.
- Phones
    - How to use
    - Voicemail
    - Review "Customer Service on the Phone" training located on SharePoint.

FOR REVIEW WITHIN THE FIRST THREE MONTHS

Within the first three months of employment, you should ensure that your new employee is familiar with the following areas in addition to what has already been covered:

- Collections
    - There is an overview on SharePoint.
- BCL Website
    - Catalog
    - My Account
    - About the Library
        - Library Board
    - Locations & Hours
    - Meeting Spaces

- Friends of the Brown County Library (https://www.browncountylibraryfriends.org/)
- SharePoint
- *Helpful Links*
    - Leave Request
    - Training Follow Up Forms
    - Facebook Events & Posts Request Form
    - Recognition Form
    - Room Reservations
    - Land's End Library Store
- Continuing Education Opportunities
    - Brown County Library
        - All Staff Meetings (every other Monday at 4pm via Teams)
        - Staff Development Days
            - Share dates for any upcoming days
        - Various other in-person training opportunities
    - Nicolet Federated Library System(NFLS)
        - In-person and online training sessions throughout the year
        - Wild Wisconsin Winter Web Conference
    - Wisconsin Library Association (WLA)
        - Annual fall conference
        - Spring Wisconsin Association of Public Librarians (WAPL) conference
        - Support Staff conference
    - Other opportunities throughout the year for in-person and online training.

EMERGENCY PROCEDURES

All employees should know and abide by the emergency procedures for their department or location. The following documents should be reviewed with your new employee once they are familiar with their location:

- Emergency manual
  - Walk the employee through what they are expected to do when the fire alarm or tornado siren sounds. Note specific meetings places for staff during emergencies.
- Emergency Closings

MEETING WITH YOUR EMPLOYEE

It is important to provide guidance to your new employee. While you do not need to be responsible for all of the training, your new employee needs time to get to know you and your working style. Set aside time on a regular basis to check in with your employee. At minimum you should be meeting for an hour each month during the first 6 months of their employment. It is critical that you create a safe and welcoming environment in these meetings. This is a crucial time for you to address any concerns that you have as a manager as well as for your employee to address any concerns they may have. You can use the following list as areas to discuss during these meetings:

- How is the job going?
- Are you getting the training you need?
- Has the training been helpful?
- Are there areas you would like more training in?
- What training would you like added?
- Do you need additional resources or tools?
- Has your mentor been helpful?
- How do you feel you are doing in your new role?
- How is your relationship with your co-workers?

- Is there anything that you feel you are out of the loop on regarding the department/branch or system?
- Is there anything you need that we are not providing?
- Do you have any suggestions for how we can improve?
- Do you have any questions about the department/branch or system?
- Is there anything you would like to share with me that I haven't asked about?

If you have concerns about your new employee's performance, address these concerns immediately. Ask questions to understand their motives. Share the reasons you are concerned and work toward finding an appropriate resolution. Unaddressed concerns at the start of employment can lead to larger problems later in the employee's career.

Be sure to give your new employee feedback to help them understand expectations. Review their Customized Feedback Form to provide constructive feedback and praise in a way that works best for them.