



# ONBOARDING RESOURCE GUIDE

UNIVERSITY OF MISSOURI-KANSAS CITY

HUMAN RESOURCES

# TABLE OF CONTENTS

Where to Start	4
Before Your New Employee Starts	5
First Day	8
First Week	11
First 30 Days	12
First 3 Months	13
First Year	14
Resource Section	15



## Congratulations on Your Hire!

Congratulations on hiring your new employee! We know this can be a busy time for both you and your new hire, so we've done some of the work for you and put together this Onboarding Resource Guide. In this resource guide you will find tips, tools and links to more online resources to guide you through the onboarding process.

Please review the resources enclosed and feel free to contact the UMKC HR Service Center at 816-235-1621 if you aren't finding the resources you need.



# Where to Start

## Overview

Onboarding at UMKC is more than an event, it's an engaging experience designed to make the new employee feel welcome in their surroundings and minimize the time it takes to become productive members of their department. It begins before the new employee steps foot on our campus with preparing the new employee's workspace, designing a first-day schedule that intentionally connects the new employee with existing team members to help them get acclimated and up to speed, and setting short and long term goals that include relevant training and development opportunities.

Our goal is to positively impact student success through this new onboarding program by retaining a highly competent, diverse and engaged workforce. As the supervisor, we need your assistance in providing your new employee with an onboarding experience that will set them up for success in their new role at UMKC.

To support you and your employee during the onboarding process, we have created to checklists to guide you through the first year:

1. [Welcoming Your New Employee Checklist](#) (see page 16): A checklist for supervisors to welcome their new employees to UMKC.
2. [New Employee Checklist](#) (see page 39): A checklist for new employees to guide them through their onboarding experience.

The easiest way to organize the onboarding process for your new employee is to divide it up according to a timeline. We will go into a more detail about each section in the following pages, but to start off take a look at our onboarding video and follow along with our [Welcoming Your New Employee Checklist](#) (see page 16).



# Before Your New Employee Starts

Have you printed off the [Welcoming Your New Employee Checklist](#) (see page 16) yet? The checklist will provide you with a detailed list of actions to complete to effectively onboard your new employee.

## Welcome Your New Employee

Welcoming your new employee is a big deal. New employees need to feel welcomed and know that their new supervisor and team are excited for them to start. To accomplish this, you have to not only welcome the new employee and prepare them for their first day, but you also need to make sure that your current staff know a new employee will be joining the team. We have 3 easy methods of communicating to your new employee and to your department.

### 1. Welcome Post Card (provided by HR)

This can be mailed to your new employee by the department once we have successful CBC results and an offer letter has been sent to the new employee. We recommend having one or more team members sign the postcard before sending to give it more of a personal touch. If you don't want to pay for postage to mail the postcard, you can also have the post card sitting at the employee's space or give it to them on their first day.

- **How do you know if an offer letter has been sent?** Your recruiter will include you on the offer letter email to the new employee.
- **Where do I get the postcard?** The postcard is provided to you by HR. You can stop by the HR office to pick one up or contact your recruiter for more information.

### 2. Welcome Email to New Employee (templates provided by HR)

We recommend sending this to your new employee two weeks or less before their start day. You can find templates of this email in the resources section (see page 20). The templates are just a suggestion and should be edited to fit the needs of your department. This should be sent to your new employee's personal email address. You can find their personal email in the offer letter email or on their application.

#### What to Include in the Email:

- General welcome to the department
- Directions to office
- Department dress code
- First day schedule if possible (remember some new employees will be in orientation on their 1<sup>st</sup> day from 8 a.m. – 12 p.m.)

### 3. Welcome Email to Department (templates provided by HR)

We recommend sending this to your department a week prior to your new employee's start date. You can find a template of this email in the resources section (see page 21). The template is just a suggestion and should be edited to fit the needs of your department.

#### What to Include in the Email:

- Introduction to the new employee: where are they coming from? Are they a UMKC Alum?
- Where they will be working and on what team if applicable
- When is their first day?

### Prepare Expectations

Once you have welcomed the new employee, the next step will be to start preparing for their arrival. This process can be time consuming, so we recommend getting started as soon as you can to make sure you are ready for your new employees first day.

You should have a list of expectations ready prior to your new employees start date. Below are a few tips to get you started in creating your expectations. You can also view the [Setting Employee Expectations Guide](#) (see page 22) for more detailed instructions on how to complete this process.

- Expectations should be related to the job description. Have a copy of the job description for both you and the new hire to review.
- Expectations should provide guidance for day to day work.
- Expectations should be clear and easily understood.
- Refer to our [Supervisor Resources](#) website for additional information.

### Create Goals

Have goals ready for your new employee starting from their 1<sup>st</sup> week and if possible through their 1<sup>st</sup> year. We understand creating goals that far in advance can be difficult and it's likely that the needs of your department and team will change, but goals can also be changed.

Goals are important to keeping your new employee engaged and contributing to the success of the department. We suggest using the SMART Goals method because it is easy to follow and outlines what should be included in each goal. You can find a detailed explanation of [SMART Goals](#), a guide to [Creating Goals for Your New Employee](#) and [Goals Worksheet](#) in the resources section (see page 24) along with a sample SMART Goals page that includes 1<sup>st</sup> week to 1<sup>st</sup> year goals.

#### A few things to remember when creating goals:

- Goals should be simple and easy to accomplish for their first week. You can gradually increase the difficulty and time commitment for the 3 month, 6 month and 1<sup>st</sup> year goals.
- Review the goals often with employee and make changes as needed. When making changes to their goals don't forget to explain the reasoning for the change and any possible effects it could have on their already existing goals.

## Create a Training Plan

Having a plan of action for your new employee that gives them a clear outline of what to expect is very important. Even if it's just for their first week, it sets them up for success, as they have a detailed plan of what to be working on during their first few days in the department. Review the [Sample Training Schedule](#) (see page 28) and edit to fit the needs for training your new employee.

- The training plan should include who, what, where and when for each task listed.
  1. Who will train them?
  2. What is the expected outcome?
  3. Where will training take place?
  4. When will the training take place? Week 1, 2, 30 days, 90 days out?
- Can the training plan align with their goals and expectations?
- What trainings do they need to complete to do their job?
- Do you have one on one's set up with the new employee to discuss their training progress?

## Set Up Your New Employees Workspace

Setting up your employee's workspace is a task that should never be forgotten as an employee will spend a lot of time there. You want the space to be clean, organized and welcoming, so the employee feels valued. Ask the following questions and review the [New Employee Workspace Checklist](#) (see page 30) for a list of items to complete before your employee arrives.

- Do they have all the supplies needed to do their job?
- Will they need any special computer programs?
- Is their workspace clean?
- Do they have a phone? Do they have an extension and does it work?
- Order business cards

See the [Welcoming Your New Employee Checklist](#) (see page 16) for additional tasks to be completed prior to new hires first day.

# Employees First Day

The first day can be overwhelming for your new employee, it's important to keep this in mind when setting up their schedule. Also, remember, your new employee might start on an orientation day. Orientation takes place every 2 weeks on Mondays from 8 a.m. – 12 p.m. During orientation your new employee will learn: A brief history of UMKC, Policy and Procedures Overview, UMKC HR Website Tour and Benefits Presentation. Orientation is led by HR and takes place in the Administrative Center. Please view the Orientation Schedule on the [HR website calendar](#).

On your new employee's first day take them on a tour of the office and building. Give them a brief overview of their schedule for the day and week if possible. Introduce them to the team and ensure they are able to log into their computer. Below are some ideas for first day introductions.

- Team ice breaker or activity: Office Scavenger Hunt
- Provide breakfast (coffee, donuts, fruit) for team
- Do a group event – visit the Toy and Miniature Museum, tour campus, do an activity based on the season, have a potluck, etc.

We have provided some examples of ice breakers in the resources section (see page 34) to get you started.

## First Day Schedule

We realize there are a lot of topics to cover during your new employees first day, we recommend creating a schedule for the day to make sure everything is covered. We have provided samples of an Orientation Day Schedule and a Non-Orientation Day Schedule below. These are samples and suggestions and can be changed to fit the needs of your department.

- **Sample Orientation Day Schedule:** After orientation all new hires are directed by the facilitator to report back to their departments.
  - 8:30 am – 12:00 pm: Orientation
  - 12:00 pm – 1:00 pm: Lunch (indicate if employee is to take lunch on their own or go with department or manager)
  - 1:00 pm – 2:00 pm: Office Tour and Activity
  - 2:00 pm – 3:00 pm: One-on-One with Manager
  - 3:00 pm – 5:00 pm: Complete Required Training
- **Sample Non-Orientation Day Schedule:** On non-orientation days new employees will report to HR at 9 am for 5 Minutes to complete new hire paperwork. We then direct them back to their department. Your new employee will need to attend Orientation by their 2<sup>nd</sup> week of work. Your recruiter should have them scheduled for orientation. Information about orientation can be found in your new employees offer letter.
  - 9:10 am – 9:30 am: Visit Parking Office
  - 9:45 am – 10:30 am: Office Coffee Break (coffee, bagels, juice), Office Activity
  - 10:30 am – 11:00 am: Office Tour
  - 11:00 am - 12:00 pm: Desk Set Up, Computer Stuff, Etc.
  - 12:00 pm – 1:00 pm: Lunch (on your own)
  - 1:00 pm - 2:30 pm: One-on-One with Manager
  - 2:30pm – 5:00 pm: Complete Required Trainings



## Topics to Discuss with your New Employee

### Department and University Overview

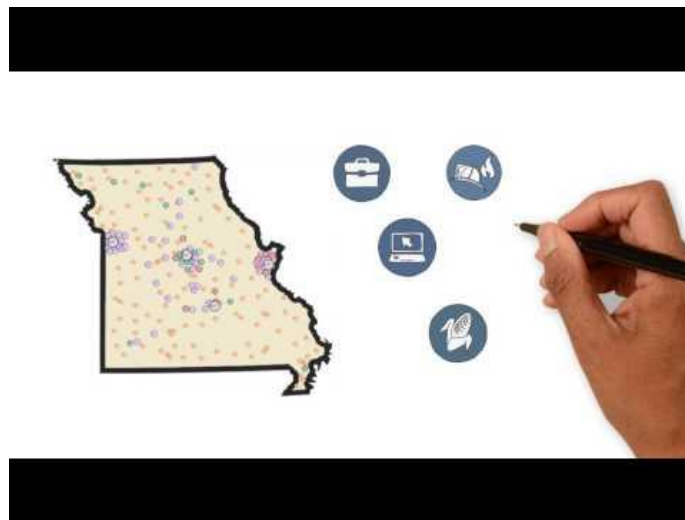
Review the department's purpose, mission, goals and organizational chart. This helps give your new employee an understanding and purpose for the work they will be engaged in through their position.

In addition to reviewing the department's goals, now is a good time to also talk about the University's goals and how your new employee's role relates to student success. Every department impacts student success and introducing them to this component of our mission is important. The University's Mission, Student Success, and Diversity and Inclusion should be a reoccurring theme when you talk about goals with your new employee. All of our goals, projects or strategic initiatives should relate back to one of these areas.

- [University Mission](#)
- [Diversity and Inclusion](#)

### System Overview

Lastly explain what "System" is to your new employee. A lot of new hires have no idea we're a part of a much bigger and amazing organization known as, the University of Missouri (UM) System. The video below provides a history of the UM System. We recommend watching the video with your new employee, then explaining the connection between UMKC and UM System.



## Review myHR

- Have your new employee log into their [MyHR](#) account. Make sure they use their [New Employee Checklist](#) (see page 39) which gives them a guide of what to review in [MyHR](#). A few of the key items they should review are:
  - Time Reporting
  - Personal Information
  - Pay & Leave Information
  - Consent to receive your W-2 Electronically (if interested)
  - MyTotal Rewards (Benefits information)
  - Update your preferred Alert! Settings

## Other Topics to Discuss:

- **UMKC Roo Card:** Did your new employee visit the [UMKC Roo Card](#) office to obtain their UMKC ID? If not take them to the OneCard Office, Student Union Room 327 to get their ID.
- **Parking Permit:** Did they have the opportunity to pick up a parking permit? If not take them to the Parking Office, Administrative Center room 221 to get their parking permit.

See the [Welcoming Your New Employee Checklist](#) (see page 16) for additional tasks to be completed on your new employees first day.

## Other First Day Resources

- [System Onboarding Tips](#)
- [Nine Ways to Make a New Hire Feel Welcome on their First Day at Work](#) By Mike Armstrong on UrbanBound Blog.

# Employees First Week

The first week, and really the first 30 days are the most important for you and your new employee. Studies show that this is the time when the highest potential for turnover occurs. In fact, according to an online article by [The Harvard Business Review](#), 33% of new hires look for a new job within their first 6 months and 23% will turnover before their first anniversary. By having an organized and detailed onboarding plan from day one you reduce the risk of turnover by 50%.

## Tips for a Successful First Week

- Make sure you have goals and expectations ready for your new employee before your new employee's start date.
- Schedule reoccurring One-on-One meetings with your new employee, either weekly, biweekly, or monthly. These will probably be more frequent during the first few months your new employee is employed, so you can check in regularly on their performance and assist with questions they have about the position and expectations.

## Topics to Cover in your One-on-One Meetings

One-on-One meetings should be happening with all of your employees. It is important to get started with these meetings soon with your new employee. You can find a guide to [Your First One-on-One](#) on the Supervisor Resources website.

During your first One-on-One, give your new employee their first assignment, review goals and expectations, and talk about the performance appraisal process. We also recommend discussing the following:

- **Office Policies and Procedures :**
  - Working hours
  - Phone, email and internet use
  - Department and/or building specific safety and emergency information
  - Office Organization (files, supplies, etc.)
  - Office Resources
  - How to clock in, request vacation/personal days, call in sick
  - Staff meetings
  - List of individuals to meet with in the upcoming weeks
  - Accountability
  - Confidentiality
  - Ethics
  - Probationary period
- **Supervisor Expectations:** If your new employee is a supervisor be sure to give them the [Checklist for New Supervisors](#) (see page 19) and discuss your expectations for them in the supervisor role.
- **Welcome Checklist:** Be sure to consult the [Welcoming your New Employee Checklist](#) (see page 16) for additional tasks to be completed during your new employee's first week.

# Employees First 30 Days

As previously mentioned, you should have regularly scheduled One-on-Ones. One-on-Ones can be scheduled every week, every other week or once a month. We suggest starting out with weekly One-on-Ones for the first month. After the first month determine the frequency based on the feedback you receive from your new employee and their performance.

In your first couple of One-on-Ones allow your new employee to discuss any issues they are having. Ask questions that will check for their understanding and set up additional trainings if needed. We know everyone's schedule is busy but these meetings can be critical to your new employee's success.

## A Few Things to Discuss in the First 30 Days

- Discuss performance and professional development goals.
- Give employee an additional assignment.
- If the employee is a supervisor, have them sign up for the [Supervisory Development Series](#) – a training program for Supervisors across UM System.
- Have your employee complete the [ePerformance](#) training called [Building a Performance Culture](#) in [Percipio](#).

## Have They Completed the Required Trainings?

- Compliance Trainings
- FERPA Training (if applicable)

Be sure to consult your [Welcoming your New Employee Checklist](#) (see page 16) for additional tasks to be completed during your new employee's first 30 days.

# Employees First 3 Months

The 90 day mark is very important in the life of a new employee. Keep up those regular One-on-Ones, review goals and expectations for your new employee and make changes accordingly.

## A Few Things to Remember

- Visit [ePerformance](#) for tips and guides to the performance appraisal process.
- Have your employee complete the [ePerformance](#) training called [Building a Performance Culture in Percipio](#).
- Meet for an informal 3 month performance check-in. Use this time to reevaluate their goals and expectations and make changes as necessary.
- Give employee additional projects.
- Review training schedule and add additional trainings if necessary. Talk about attending a Green Dot or Diversity and Inclusion sponsored training.

# Employees First 6 Months

The 6 month mark is a great time to give your new employee an informal 6 month review and provide an opportunity for you to ask for some feedback from your employee. A few topics to ask for feedback on could be onboarding, training structure, what they would change about the onboarding, future goals and projects they would like to incorporate.

While a 6 month review isn't mandatory it's a helpful tool to show areas of progress and areas where improvement is needed. You can find resources to get you started on the [Supervisor Resources](#) website and the [ePerformance](#) website.

# Employees First Year

Review the performance evaluation process and goals. There shouldn't be any surprises for your employee going into the review. They should have a good understanding of how well they are meeting their goals and expectations.

- Visit the [ePerformance](#) website for tips and guides to the performance appraisal process.
- Have your employee complete the [ePerformance](#) training called [Building a Performance Culture in Percipio](#).
- Be sure to celebrate their successes. Check out the [Employee Recognition Guide](#) (see page 32) in the resources section.
- Discuss employee's experience at UMKC to date – solicit feedback on their experience and see if there are opportunities for change and improvement:
  - Include discussing employees knowledge, skills and abilities, and if they are being utilized.
  - How can we better utilize their knowledge, skills and abilities?
  - Are there opportunities to use their skills and abilities for outreach that can positively impact the department and UMKC?
  - What are their professional goals and how can UMKC help them reach those goals?
  - Begin discussing plans for their 2<sup>nd</sup> year of employment.

Be sure to consult your [Welcoming your New Employee Checklist](#) (see page 16) for additional tasks to be completed during your new employee's First Year.

# Resource Section

<b>Resource</b>	<b>Page</b>
Welcoming Your New Employee: A Checklist for Supervisors	16
New Supervisors Checklist (provided to new employee who supervises)	19
Welcome Email Templates	20
Setting Employee Expectations	22
Creating Goals for Your New Employee	24
SMART Goals Worksheet	27
Training Schedule Template	28
New Employee Workspace Checklist	30
Employee Recognition Guide	32
Ice Breakers	
○ Getting to Know You BINGO	34
○ Getting to Know You BINGO Board	35
○ Create Your Own BINGO Board	36
○ Team Scavenger Hunt	37
○ Office Mini Gold Course	38
Resources given to your New Employee:	
○ New Employee Checklist	39

# Welcoming your New Employee

*A Checklist for supervisors to welcome their new employee to UMKC*

## Employee Information

Employee Name: \_\_\_\_\_ Position: \_\_\_\_\_

Start Date: \_\_\_\_\_ Orientation Date: \_\_\_\_\_

Supervises Others: Yes  No

## Before Employee Start Date

- Send Employee Welcome Post Card (provided by HR).
- Send Employee Welcome Email
  - Include:
    - General welcome to the department – include a link to department website
    - Agenda for the employee’s first day, including directions on where to go on the first day or after orientation ends
    - Dress Code for department
- Email Department of the new hire. Include start date, employee’s role, and bio. Copy the new employee, if appropriate.
- Create a list of critical people the employee needs to meet during their first few weeks. Set up meetings with those individuals, or provide the list to new employee for them to set meetings up once they begin working.
- Plan the employee’s first assignment.
- If you are not able to be with the employee often, select another employee to act as a mentor/buddy for the new employee to provide guidance for them as they get settled.
- Clean the new employee’s work area, set up cubical/office space with supplies. Also make sure the IT equipment (computer, printer, monitor, etc.) and phone is ready for the employee.
- Order business cards and name plate.
- Add employee to relevant email lists.
- Add regularly scheduled staff and department meetings to employee’s calendar.

## Employee’s First Day

- Remember that the new employee might attend Orientation on their first day. If they are at Orientation, they won’t be done until around noon. If there is no orientation scheduled for the employee’s first day, they will report to HR at 9am to complete their hire paperwork and then they will report to the department.



- Give a warm welcome and discuss the plan for the first day, for example take the employee out to lunch.
- Tour the employee's assigned work space.
- Provide necessary keys to employee, keys for the office, keys for their desk, etc.
- Tour the department and building, be sure to also explain where restrooms and break areas are located. Also during the tour, introduce the new employee to other staff members.
- Introduce the new employee to the person you have identified as a mentor/buddy if appropriate.
- Review department (or office's) purpose, organizational chart and goals.
- Review job description, expectations with employee, and how the employee's job supports the department goals.
- Review office policies and procedures including:
  - Working hours
  - Telephone, email, and internet use
  - Department and/or building specific safety and emergency information
  - Office Organization (files, supplies, etc.)
  - Office Resources
  - Staff meetings
  - List of individuals to meet with during upcoming weeks
  - Accountability
  - Confidentiality
  - Ethics

### During Employees First Week

- Give employee their initial assignment. (make it something small and doable).
- Debrief with employee after they attend initial meetings and trainings and being working on initial assignment. Continue to touch base briefly each day.
- Explain the annual performance appraisal and goal setting process.
- Review the process related to the probationary period.
- Arrange for a personal welcome from the unit leader.
- Ensure the employee has fully functioning computer and access and understands how to use them.
- Clarify any performance expectations or policy questions that you have with your supervisor or HR.
- Review [UMKC's Mission, Vision and Goals](#) and discuss how your department supports them.
- If the employee is a supervisor, review list of direct reports with employee. Have the employee:
  - Review list of direct report positions, including duties and responsibilities of each one.
  - Expectations for Direct Reports – if none are set up, have employee create them. If there are already expectations, have employee review and edit to fit the expectations they have of their direct reports

### Employees First 30 Days

- Schedule and conduct regularly occurring one-on-one meetings.
- Continue to provide timely, ongoing and meaningful "everyday feedback".
- Elicit feedback from the employee and be able to answer questions.

- Discuss performance and professional development goals. Give employee an additional assignment.
- Ask if required FERPA (if applicable) and compliance trainings have been completed.
- If the employee is a supervisor, recommend they sign up for the [Supervisory Development Series](#) – a training program for Supervisors across UM System.

### Employees First 3 Months

- Continue having regularly occurring one-on-one meetings.
- Meet for an informal 3 month performance check-in.
- Ask if there is any training the employee needs.
- Provide information about continued learning opportunities including tuition assistance, training and development opportunities through Human Resources.
- Invite employee to UMKC events and introduce them to others.

### Employees First Year

- Review progress on performance goals and professional development goals
- Celebrate successes and recognize employees contributions
- Continue providing regular informal feedback in one-on-one meetings.
- Discuss employees experience at UMKC to date – solicit feedback on experience and see if there are opportunities for change and improvement:
  - Include discussing employees knowledge, skills and abilities, and if they are being utilized. Discuss ways to better utilize them.
  - Begin discussing plans for 2<sup>nd</sup> year of employment.

### Additional Information

If your employee has questions about benefits? Or how to enter your time? HR is here to help you and your new employee during this transition.

Contact the UMKC HR Service Center at  
**816-235-1621**  
or visit  
[www.UMKC.edu/HR](http://www.UMKC.edu/HR)

# Checklist for New Supervisors

A Checklist for new employees who have direct reports

## Review list of Supervisees

Review the list of employees who you supervise paying attention to:

- Employee's position
- How long the employee has been employed at UMKC and in their current position
- Employees location on campus
- Duties/responsibilities that each employee is responsible for in their position at UMKC

## Setting Expectations

- Describe your leadership philosophy and clarify your availability for emergency and non-emergency situations.
- Build trust and credibility with your direct reports, but separate friendship from your position. Set and maintain clear boundaries.
- Learn more about the structure of your own department by asking your manager or appropriate departmental contact about the specifics of your department.

## Review Performance Appraisals

- Review the [ePerformance Progress Check-ins](#) on the Human Resources webpage.
- Learn how to use ePerformance with your employees throughout the year.

## Supervisor Resources

- Sign up for the [Supervisory Development Series](#) – a training program for Supervisors across UM System.
- Review the University of Missouri-Kansas City's [work policies](#).
- Learn how to approve employees' timesheets by visiting the [PeopleSoft HR Support](#) website.
- Review the payroll schedule on the [HR Operations](#) website.
- Log into PeopleSoft HR. On the homepage, several pagelets will provide you with useful information:
  - The Direct Line Reports** pagelet provides information such as employees' job titles, salary range position, compensation, and leave balances.
  - The Birthday Alerts** and **Anniversary Alerts** pagelets provides information on upcoming birthdays and service anniversaries
  - The **myEmployees Training Status** pagelet provides information on whether or not employees have completed required compliance training
- For additional resources, visit the [Supervisor Resources Page](#) on the Human Resources webpage.

# Sample Welcome Email to New Employee

These are sample emails and simply suggestions. Please change these to meet the needs of your department.

Hi [Insert Name],

This is just a quick note to tell you that our whole department is excited for you to start on [Hire Date]! Please see your offer letter for details on the when and where details of your first day. We will be going out to lunch as a department and lunch is on me your first day!

[Name of Office]  
[Address]  
[City, State Zip]

[Maps](#) of our [Volker](#) and [Hospital Hill](#) Campuses

## A few things to know

- Dress is business casual. If you have any questions please feel free to call or email me.
- Be sure to check out the [New Employee](#) page if you haven't already. There you can find information on parking, links to benefits information and more.

**In an effort for us to get to know you a little better we ask that you answer a few questions for us.**

1. What is your favorite snack?
2. Favorite color?
3. Hobby?
4. Favorite sports team?
5. Favorite movie?

We will spend some time in the afternoon going over your training schedule and discussing any questions you may have.

Again we are so excited to have you join our team and become a part of the UMKC community! If you have any questions at all please don't hesitate to reach out to me.

Sincerely,

[Supervisor Name]  
[Title]

# Sample Welcome Email to Department

These are sample emails and simply suggestions. Please change these to meet the needs of your department.

Put some fun into this email. It's an easy way to make the informal announcement and introduction to your team. It provides a glimpse of their new team member and allows them to start building a connecting.

Dear Colleagues:

I am pleased to announce that [First and Last Name] has accepted the position of [Title] in [Department], effective [Hire Date]. This position reports to [Name].

[First Name] will be responsible for [High Level Overview of Major Responsibilities].

[First Name] brings experience and a proven track record of success in the [Professional Field] area, which will be invaluable in meeting the departmental goals and objectives. A few fun facts about [First Name]. They enjoy long walks on the beach, their favorite color is pink and chocolate is their favorite snack. I know we are all excited to have them join our team!

I am confident that [First Name] will be an excellent match for this position and a strong asset to the [Department/Team]. [First Name] will be located in [Building/Room #] and can be reached at [Extension] or [E-Mail Address].

Please join me in welcoming her/him to [the Organization/Department].

Sincerely,

[Supervisor Name]  
[Title]

# Setting Employee Expectations

The act of setting employee expectations for performance and behavior is one of the most important conversations a supervisor will have with their employee. This conversation will let an employee know exactly what is expected of them in their position and will set a foundation for their performance.

## General Expectations for all Employees

It's ideal to have the expectations created before an employee begins working in their position, however expectations can really be created and presented at any time. Also, if a supervisor has more than one employee, general office expectations can be created and distributed to all employees. This will keep expectations consistent with all employees and easier for the supervisor to manage. It is recommended to create these expectations, print them out and give a paper copy to an employee when you meet to discuss them.

Below is a list of ideas to include in your list of expectations for your employees:

- Be here on time for your scheduled shift.
- Plan for scheduled absences ahead of time. (Can include specific requirements for requesting time off and getting approval).
- Obtain approval from supervisor prior to working overtime or comp time.
- Dress appropriately for the workplace. (Can include specific office dress code).
- Maintain a positive, helpful attitude.
- Maintain confidentiality.
- Provide quality service.
- Treat others with dignity and respect at all times.
- Maintain the qualifications, certification, licensure, and/or training requirements identified for their positions.
- Support efforts that ensure a safe and healthy work environment.
- Enjoy your time at work!
- Perform all duties as assigned.

## Specific Performance Goals for Individual Employees

Set specific goals tailored to the position and the employee. Start with a job description and develop goals and targets for employees to meet.

As a new employee settles into a position, these goals might have to be adjusted, but this will help provide guidance of what is expected. Be mindful to not set unreasonable goals, setting an employee up to fail will only lead to employee dissatisfaction and possible turnover for an employee. Be realistic and set a few key goals for the first few months the employee is working.

## Discuss Performance Frequently

Conversations about performance should happen often with employees. Supervisors should be meeting with employees on a regular basis, once a month at the least, but often once a week or every other week depending on the needs of the employee and the office. During these one on one meetings, discuss progress of the performance goals to reiterate the expectations you have for the employee. These meetings will also help supervisors assess if the work load needs to be adjusted for the employee. Individual meetings are also a great way for supervisors to ask employees what they can do to help with meeting goals, showing support for the work the employee is completing. These meetings also provide an opportunity for a supervisor to get to know their employees interests, which can be beneficial for a supervisor then assign the employee work that they enjoy.

# Creating Goals for Your New Employee

## A few things to remember

1. Goals should be clear and easy to understand.
2. They should be obtainable in the time frame given.
3. Review them often with employee.
4. Make changes and adjust as necessary.

## Ask yourself the following Questions

1. How does this goal relate to my employee's job?
2. Will this provide opportunities for development?
3. Allow them to obtain new skills?
4. Will this impact their ability to do their regular work?

**SMART Goals** clarify expectations between employees and managers. They provide clear direction for your new employee and assist with the performance appraisal process. Remember that goals are liquid and change is ok. Goals should be discussed and revised based on the needs and performance of your new employee.

Specific    Measurable    Attainable    Relevant    Timely

**Specific** goals: Define specific results & provide concrete details on what is to be achieved

- What do you want the employee to accomplish? Why?
- What are the requirements?
- What are the constraints?

**Measurable** goals: Define how success will be measured

- How will you measure your employee's progress?
- How will you know when the goal is accomplished?

**Attainable** goals: Are challenging and go beyond day-to day duties using resources available

- How can the goal be accomplished?
- What are the steps the employee should take?

**Relevant** goals: Are focused on what is to be accomplished in a broader context.

- Is this a worthwhile goal?
- Is this the right time for this goal?

**Timely** goals: are committed to a deadline which helps focus efforts on completion of the goal.

- How long will it take to accomplish the goal?
- What is the due date?
- When is the employee going to work on this goal?



## Examples of 30 Day Goals

**Goal:** Identify ways to reduce student wait time from 8 minutes to 5 minutes.

**Expected time to complete:** Discuss at the end of your first 30 days

**Goal:** Improve customer satisfaction scores by 5%

**Expected time to complete:** Create and implement plan by end of 90 days

## Goals Worksheet

We have created a blank [Goals Worksheet](#) (see page 26) to assist with the process for writing goals for your new employee. It is recommended that you have a few goals established for the employee to begin working on during their first few weeks of employment. Make the first few goals, simple to complete, to set the employee up for success in their new role, and gradually increase the complexity of the goals as the employee is in their position.

# Goals Worksheet

## First Week

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

## 30 Days

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

## 90 Days

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

## 6 Months

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

## 1 year

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected time to complete: \_\_\_\_\_

# Sample Training Schedule

This is only a suggestion. You can change this to meet your training needs and schedule.

Day 1: Date:			
Time	Location	Topic	Training Type and Facilitator
8: 30 am – 12:00 pm	Administrative Center	New Hire Orientation	Instructor lead: HR
12:10 pm – 1:15 pm	Lunch	Employee to go to lunch on their own	Employee
1:15 pm – 2:15 pm	Department	Department Activity	Supervisor
2:15 pm – 3:15 pm	Supervisor's Office	<ul style="list-style-type: none"> <li>Review of Job descriptions, roles and responsibilities</li> </ul>	Supervisor
3:15 pm – 5:15 pm	Desk	<ul style="list-style-type: none"> <li>Set up and organize desk</li> <li>Start required training in Percipio.</li> </ul>	Online training Percipio
Day 2: Date:			
Time	Location	Topic	Training Type and Facilitator
Day 3: Date:			
Time	Location	Topic	Training Type and Facilitator
Day 4: Date:			
Time	Location	Topic	Training Type and Facilitator

<b>Day 5: Date:</b>			
<b>Time</b>	<b>Location</b>	<b>Topic</b>	<b>Training Type and Facilitator</b>
<b>Week 2: Date:</b>			
<b>Time</b>	<b>Location</b>	<b>Topic</b>	<b>Training Type and Facilitator</b>
<b>Week 3: Date:</b>			
<b>Time</b>	<b>Location</b>	<b>Topic</b>	<b>Training Type and Facilitator</b>
<b>Week 4: Date:</b>			
<b>Time</b>	<b>Location</b>	<b>Topic</b>	<b>Training Type and Facilitator</b>
<b>Week 5: Date:</b>			
<b>Time</b>	<b>Location</b>	<b>Topic</b>	<b>Training Type and Facilitator</b>

# New Employee Workspace Checklist

Name: \_\_\_\_\_

Location of Workspace: \_\_\_\_\_

Start Date: \_\_\_\_\_

**Clean the area:** Please use the appropriate cleaning material for item you are cleaning.

- Clean the desk and wipe down with disinfectant wipes.
- Clean out any drawers, shelves, cubbies or other personal space provided to them.
- Wipe down the phone.
- Wipe down keyboard, mouse, tower and printer.
- Wipe down headset.

**Supplies:** Check to ensure your new employee has the following supplies.

- |  |   |
|--|---|
| <input type="checkbox"/> Pens                  | <input type="checkbox"/> Note pads                    |
| <input type="checkbox"/> Pencils               | <input type="checkbox"/> Business Cards               |
| <input type="checkbox"/> Highlighters          | <input type="checkbox"/> Business card holder         |
| <input type="checkbox"/> Scissors              | <input type="checkbox"/> Hand sanitizer               |
| <input type="checkbox"/> Calendar              | <input type="checkbox"/> Tissues                      |
| <input type="checkbox"/> Stapler               | <input type="checkbox"/> Trash can                    |
| <input type="checkbox"/> Tape                  | <input type="checkbox"/> Chair                        |
| <input type="checkbox"/> Thumb tacks           | <input type="checkbox"/> Coat rack or hook            |
| <input type="checkbox"/> Binder clips          | <input type="checkbox"/> Keys to desk                 |
| <input type="checkbox"/> Paper clips           | <input type="checkbox"/> Miscellaneous supplies       |
| <input type="checkbox"/> Staple remover        | <input type="checkbox"/> Printer or access to printer |
| <input type="checkbox"/> Desk drawer organizer | <input type="checkbox"/> Name Tag                     |
| <input type="checkbox"/> Folders               | <input type="checkbox"/> Name Plate                   |
| <input type="checkbox"/> Files                 | <input type="checkbox"/> Notepad                      |

**Other supplies or programs needed**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Notes**

**Supplies to order:**

---

---

---

---

**Issues with workspace:**

---

---

---

---

# Employee Recognition Guide

## Points to Remember When Giving Recognition

- **Make it specific.** Don't just tell an employee they did a good job; tell them how they did a good job. Not only will they appreciate the gesture, they will also know you pay attention to what they do. They will also know exactly what to do the next time in a similar situation.
- **In the moment.** As much as possible, be timely when giving recognition. If you catch people doing excellent work, acknowledge their efforts.
- **Talk about it.** Starting a conversation gives you an opportunity to tell the individual why what they did was so good. The message reinforces how what they did is important to the department.
- **No “sting in the tail.”** Don't ruin the recognition by saying “Well done, but....” Praise and recognize now. Save performance improvement opportunities for later.
- **Put it on record.** This should be used in addition to delivering the message verbally, face to face and as soon as possible. These records will be an important part of your performance discussions with your employee(s).
- **Be authentic, not automatic.** Never praise for the sake of praising. It's obvious to everyone, and you lessen the impact when you really do mean what you say.
- **Make it public.** This rule is excellent advice, but be a little careful. If your department isn't in the habit of giving recognition now, you should go gently and increase the amount of recognition steadily and consistently.
- **Pass praise on.** When someone else recognizes a person on your team, let them know.
- **Treat employees like snowflakes.** Every employee responds differently to recognition. Many appreciate public praise. Others cringe if they're made the center of attention. Know your employees and tailor your recognition so it produces the greatest impact for each individual.
- **Look for opportunities to praise people.** It is important to go looking for good work. In particular, think about:
  - **Who?** Praise for your team might come from many sources so keep your eyes and ears open.
  - **When and Where?** You should be constantly on the lookout for good work to recognize, but there may also be particular times when and places where the search is likely to be productive.



## Quick and Easy Ideas for Recognition

Here are several simple ideas that can be taken to give recognition and rewards:

- “Sticky” praise - Use sticky notes to say thanks
- “Bravo” bulletin board
- Appreciation certificate
- Acknowledge birthdays, work anniversaries, new babies and other significant life events
- Nominate a staff member for a Staff Council [Kasey Kudos High Five](#)
- Greet employees by name when you pass by their desk or pass them in the hall
- Acknowledge individuals or teams at a staff meeting, management meeting, board meeting, or special event. This is often meaningful for the recipient and can be a source of inspiration for others
- A personal note can be very meaningful. Keep a pack of note cards in your desk for convenience. You could also send an e-mail to acknowledge work well done
- Encourage your team to give each other spontaneous recognition
- A simple "hello" at the start of the day and "goodbye" at the end of the day is an obvious but sometimes overlooked form of recognition. As employees are called upon to do more with less, spending just a few minutes chatting can open lines of communication and can set a positive tone for the day

# Get to Know You BINGO

**Objective:** To participate in a non-traditional “get to know you” game and allow team time to learn about each other. Encourages all to get up, move around and interact with as many people to get BINGO card filled out.

**Materials needed:** Copies of the BINGO card for each person, pens or pencils.

### How to play

- Tell group it’s time to play BINGO.
- Distribute cards and pens/pencils to each person.
- Each person must get up, move around the room and find someone who fits a particular square on the card. That person will initial the specific square.
- Each player can only sign another player’s card once.

### BINGO Cards

We provided two cards. One is filled in and ready to go. The other is blank so you can create your own cards.

### Purpose

The goal of this game is to have your team and new employee get to know each other with fun facts. It creates interaction between new and existing team members and allows for a few laughs.

<b>FAST FACTS</b>
<b>How many can play?</b> 10-50 People
<b>Time</b> 5 - 10 Minutes
<b>Cost</b> \$0
<b>Skill Level</b> Easy

## Get to Know You BINGO!

B	I	N	G	O
Does Not Have Any Pets  _____	Loves County Music  _____	Is Afraid Of Spiders  _____	Has Never Broken A Bone  _____	Was In The Marching Band  _____
Is Wearing Yellow  _____	Has Been To Europe  _____	Has Been on A Motorcycle  _____	Attended UMKC  _____	Ran A 5K  _____
Prefers Coke Over Pepsi  _____	Drives A Truck  _____	FREE SPACE  _____	Has Seen All Of The Star Wars Movies Old and New  _____	Has Been To A Royals Game  _____
Is The Oldest Sibling  _____	Can Salsa Dance  _____	Favorite Color is Pink  _____	Was Born In December  _____	Prefers Pepsi Over Coke  _____
Has Read All the Harry Potter Books  _____	Is Left Handed  _____	Can Play An Instrument  _____	Can Speak A 2 <sup>nd</sup> Language  _____	Played Sports In School  _____

# Get to Know You BINGO!

B	I	N	G	O
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

# Team Scavenger Hunt

**Objective:** Get the team moving around the office/campus.

## Materials needed:

- Items to find
- Check off list
- Map of campus (if needed)
- Pens/pencils

## How to play

- Divide into teams.
- Distribute list and other materials needed.
- The teams will work to find as many items as possible in 10-15 minutes. They items can be hidden within the office or you can expand it to different buildings on campus. In order to show that they found an item they would bring that item with them or take a picture.
- At the end of the allotted time the teams would meet back and compare who found the most items.

## Scavenger Hunt Ideas

- Use a campus map and create 5 clues to places on the map.
- Have each team member write a clue about 1 item in their workspace. Put the list of clues together and office scavenger hunt completed 😊

## Purpose

The purpose of this game is to provide an opportunity for team building and allow your new employee to engage with the team in a fun collaborative environment. The team with the most items found is the winner and gets bragging rights until the next Scavenger Hunt.

### FAST FACTS

**How many can play?**  
6 – 60 People

**Prep Time**  
20 – 30 minutes

**Playing Time**  
30 - 40 Minutes

**Cost**  
\$0

**Skill Level**  
Medium

# Office Mini Golf Course

**Objective:** Team members will work together to plan and create a mini golf course in the office. Allowing the team to communicate and build skills to accomplish the end goal, creating a hole.

**Materials needed:**

- Items in the office
- 1-2 putters or provide materials for the team to make their own golf clubs.
- Paper towel tubs, tape, sticks, pop cans/bottles
- Golf balls

**How to play**

- Divide into teams.
- Give teams 10 min. to build a hole on the course with objects and supplies found in the office.
- Teams will then play the course as individuals.
- Once each person has played the course have the team's reform and vote on the best hole, most difficult, most creative.

**Purpose**

The purpose of this game is to provide an opportunity for collaboration and allow your new employee to engage with the team in a fun environment.

Need some inspiration?

- Visit Pinterest or Google.

**FAST FACTS**

**How many can play?**  
5 - 15 People

**Prep Time**  
10 minutes

**Playing Time**  
15 - 30 Minutes

**Cost**  
\$0

**Skill Level**  
Medium

# New Employee Checklist

## WELCOME TO THE UNIVERSITY OF MISSOURI – KANSAS CITY!

Contact the UMKC HR Service Center at 816-235-1621 for any questions related to onboarding unless otherwise noted for specific areas.

### Employment Information

This section is to help you keep track of all the important information for your new position. Fill in as you receive information about your position.

Employee Name: \_\_\_\_\_ Position: \_\_\_\_\_

Department: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Start Date: \_\_\_\_\_ Orientation Date: \_\_\_\_\_

The information below will be provided when you complete your onboarding paperwork from UMSystem. You will receive an email 24-48 hours after receiving your offer letter.

Employee ID: \_\_\_\_\_ Single Sign On (SSO): \_\_\_\_\_

Your SSO is “hash based” and comprised of your initials plus random characters. The SSO is also used as your UMKC Username. You will also create your password for your SSO/UMKC Username when you complete the onboarding paperwork. Be sure to remember your SSO/UMKC Username and password as they will be used to access all information regarding your employment, the computers at UMKC, and much more.

By default, your employee email address will be your SSO/UMKC Username @umkc.edu.

Employee Email: \_\_\_\_\_@umkc.edu

While you are required to use your SSO/UMKC Username as your login, you can create a more friendly email alias. Go to <https://accounts.umsystem.edu/> and login using your SSO/UMKC Username and password. Once logged in select Personalize Account. Click the Personalize Email button and follow directions provided.

### Before Your Start Date

- Complete the onboarding paperwork from UMSystem.
- Locate documents that prove your identity and employment authorization. You will need to bring with you on your first day to complete [I-9 documentation](#).
- Review [campus map](#).
- Visit the [Parking and Transportation](#) website to determine the best commute, cost and parking options.
- Review your department’s homepage and the [New Employee](#) page on the HR website.
- Review check list for first day to get an idea of what to expect when you arrive at UMKC.
- Visit Glassdoor & feel free to leave a comment about your experience with UMKC.

## On Your First Day

- Visit the Human Resources Office to complete your onboarding paperwork (bring identification documents).

**UMKC Human Resources Office**  
Administrative Center, Room 226  
5115 Oak Street  
Kansas City, MO 64112

- Attend New Employee Orientation. Refer to Offer Letter for assigned Orientation date and time.
  - Orientation begins at 8:30am and takes place in the Conference Center located on the 2<sup>nd</sup> floor of the Administrative Center, down the hall from the Human Resources Office.
- If interested in purchasing a parking permit, visit the UMKC Parking Office located on the 2<sup>nd</sup> floor in the Administrative Center. Bring your license plate number.
- Take photo and obtain UMKC Roo Card from the UMKC Roo Card Office in the Student Union, room 327.
- Access your UMKC Email Account.
- Visit your [myHR](#)\* account to view important information about your position including:
  - Time Reporting
  - Personal Information
  - Pay & Leave Information
    - Consent to receive your W-2 Electronically (if interested)
  - MyTotal Rewards (Benefits information)
  - Update your preferred Alert! Settings

\*You can also access your myHR account through the UMKC HR webpage: [www.umkc.edu/hr](http://www.umkc.edu/hr). There is an animated button under the What's New section on the homepage.

## During Your First Week

- Review your workspace and make sure that you have the adequate materials for your work.
- Clarify any performance expectations or policy questions that you have with your supervisor or HR. Things you might discuss include:
  - Breaks/Lunch
  - Overtime/Comp Time
  - Process for Requesting Time Off (Vacation/Personal/Sick)
  - Performance expectations
  - Suggested Percipio Trainings
- Review [UMKC's Mission, Vision and Goals](#) .
- If you will supervise employees, view and print the [Checklist for New Supervisors](#).

## Your First 30 Days

- If benefit eligible, complete benefits enrollment within 30 days of your start date. For assistance with benefits, please contact Ted Stahl at 816-235-1625.
- Review all [University Policies](#) in your first 30 days.
- Complete the required online training (will be notified via email with directions on how to access trainings).
  - Compliance Trainings
  - FERPA Training (if applicable)



## Additional Information

Have questions about benefits? Or how to enter your time? HR is here to help you as you begin your new position.

Contact the UMKC HR Service Center at

**816-235-1621**

or visit

[www.UMKC.edu/HR](http://www.UMKC.edu/HR)

### Other Campus Resources

<a href="#">ADA Accommodations:</a> .....	816-235-6910
<a href="#">Affirmative Action:</a> .....	816-235-1323
<a href="#">Roo Card Office</a> .....	816-235-6657
<a href="#">Parking Services</a> .....	816-235-5256
<a href="#">Staff Ombudsperson</a> .....	816-235-1400
<a href="#">Swinney Recreation Center</a> .....	816-235-1772
<a href="#">Information Services</a> .....	816-235-2000
<a href="#">UMKC Police</a> .....	816-235-1515
<a href="#">UMKC Help Central</a> .....	816-235-2222