Agenda

- Introductions
- Expectations
- Background Information
- Essential Notice & Welcome Email
- Welcome Video
- Workflows
- Checklists
- OHR Monthly Orientation
- Safety Training
- Communication & Roll Out Plan
- Survey
The Team

David Barnes
Mitchell Barrington
Joey Carson
Donna Chastain
Kim Cholewinski
Jennifer Creighton
Michael Dooley
Tammy Hubert
Luke McIlvenny
Kay Miller
Cindy Myers
Tracey O’Brien
Jenna Reeves
Melanie Rose
Christina Schaaf
Lori Wolcott
The Sponsors

Linda Powell
OSU Shared Services

Aaron Howell
Business Affairs

Dave Blake
Office of Human Resources

Patti Snopkowski
Office of Audit Services

LEAN Champion / Executive Sponsor
Glenn Ford
Vice President
Finance & Administration
This project wouldn’t be possible without the input and assistance of stakeholders across OSU

- Academic Affairs
- Business Affairs
- Environmental Health & Safety
- General Counsel
- New Employees, Supervisors, Hiring Units
- Office of Equity and Inclusion
- Office of Human Resources
- Shared Services/Business Centers
- University Relations & Marketing
Sponsors support that business centers are required to use the HR and Finance checklists when conducting a new employee orientations. We assume feedback for improvement will be gathered regularly from HRMs and FAMs. We also support that every business center will provide the hiring manager with a copy of Supervisor/Department checklist as a tool for getting employees off to a good start quickly. (This is an important connection with the hiring manager and should be done in-person or via phone call for a more personal customer-centric touch)

* Linda Powell & Dave Blake

- We always start and end with the customer’s needs in mind
- Collaboration and relationships are keys to success
- Ongoing feedback from all parties will ensure continuous improvement
Feedback from new hires indicated that they were not appropriately on-boarded and were provided limited direction on how to get started.

A Lean Process Improvement Team was assigned to address weaknesses of existing onboarding process.

Identified lack of role clarity, duplication of effort, bottlenecks, lack of training/onboarding in key areas, inconsistent processes, limited tools, and areas of non-compliance.

Created enhancements and tools to address the identified needs.
AS-IS Process Maps
Benefits

• Save HR, Finance & Accounting, Safety, and departments / supervisors time
  o Tools have been created for ease of use
• Provide a comprehensive roadmap that will ensure employees will get off to a great start
• Maximize employee output faster
• Help create a powerful OSU community
“Leaned” Process
Essential Notice & Welcome Letter

Sub-Committee:
*Cindy Myers
Christina Schaaf
Tammy Hubert
Welcome Video

Sub-Committee * Dave Blake, Donna Chastain & Steve Clark

It will address OSU’s mission, the key strategic areas of stewardship and inclusion, and the primary purpose of our existence – students.
Workflows

- Business Center Checklist
- Supervisor Checklist/Training
- Finance and Accounting Checklist

Sub-Committee:
* Tracey O’Brien
  Mitchell Barrington
Supervisor/Department Checklist & Training

Sub-Committee:
*Kim Cholewinski
Joey Carson

New Employee Onboarding
Supervisor / Department

A checklist for supervisor or department representative use when onboarding new employees.

Purpose
To help new employees get off to an optimum start.

When planning the on boarding of a new employee, it is suggested the first few days or first week be
dedicated to onboarding and training activities.

Onboarding is most successful when a new employee is paired with a mentor. The mentor can be a
coworker, manager, department contact, or other individual who can help the new employee
navigate their first few months at OSU. It is suggested the search committee members reach out to
the new employee, helping them feel welcome. It may also be appropriate for committee members to
check in with the new employee on a regular basis.

Check List Instructions
Review and discuss all applicable items on the list with the new employee. Questions may be
directed to your business center human resources staff.

* Indicates items which can be completed prior to a new employee’s first day of work.

Job Tools Setup

Phone/Telecom
http://osunetconnect.oregonstate.edu/index.php

Data port
http://osunetconnect.oregonstate.edu/index.php

Order business cards
http://oregonstate.edu/where-to-buy-office-supplies

Computer and peripherals

Add email in scanning feature on departmental copier (if applicable)

Budget authority set up (if applicable)

Request Systems Access and System Training Required for Position

Banner
http://oregonstate.edu/training/admin-systems-training
Supervisor/Department Checklist

Checklist that provides supervisors/departments with important information and resources to share with new employee.

Key Components
• Work space and job tools setup
• Key items to set up prior to employee’s start date
• General reminders
• Items to address on new employee’s first day
• Unit, building, workspace, and resources overview
• Employee & university policies/expectations
• Trainings/certifications
Supervisor/Department Checklist

- BC HR provides the supervisor/department with the checklist after a signed offer letter is received.
- Includes a guide that provides additional/background information about checklist items.
- Includes hyperlinked web addresses. Enables users to either click on a web address or manually type a web address into a browser.
- Will be located in OSCAR.
- Includes extra space for items to be added.
Supervisor/Department Training

To be developed. Topics that may be included:

• Flexibility in how information is provided to new employees by supervisor/department.

• Benefits of the program and tools.

• Detailed overview of items included in checklist and guide.

• Program history, process, and fluidity.

• Request for feedback on how to improve the supervisor/department resources.

• Overview of resources available to supervisors/departments.
Business Center HR Checklist

Sub-Committee:  
* Tracey O’Brien  
* Tammy Hubert  
* Jenna Reeves

For BC HR consultant to review with new classified, professional faculty, academic faculty and post doc employees.

Purpose
Ensure new employees receive consistent information regarding conditions of employment, rights as university employees, available benefits, and resources.

Instructions
Within 3 days of employee’s hire date...
Provide the following information to the new employee. The employee and the HR Consultant are to sign the form as verification that the required onboarding documents took place.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M#</th>
<th>University ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Department  
Job Title  
Employee Class  
Position

Employment

- Required New Hire Paperwork:  
  - [Link]
- Getting To Know Your Business Center:  
  - [Link]
- Finance Brochure: HR Consultant to confirm that the appropriate finance contact has been notified of the new hire.  
  - [Link]
- Copies of Job Specific Information: signed offer letter, OSU email account, onboarding email
  - [Link]
- Signing Up for ONID:  
  - [Link]
- Employee ID Card:  
  - [Link]
- "Getting Off To A Great Start" Document:  
  - [Link]
- OHR New Hire Orientation/Training Schedule:  
  - [Link]
- Disability Access Services:  
  - [Link]
- Employment Verifications – The Work Number:  
  - [Link]
Business Center HR Checklist

Checklist that provides new employees with information and resources related to:

• Employment
• Payroll & Leave
• Benefits
• Safety
• Transportation & Parking
• General Information
  o Rights & Responsibilities
  o Smoke-free OSU
  o Union information for Classified Staff
  o Trial Service for Classified Staff
  o Staff Policies & Procedures Manual
  o Location of University Ombuds Office

• Workplace
• Inside OSU Website
• Communicating with the OSU Community
• Supervisor-specific information for new hires who have a supervisory role
Business Center HR Checklist

• Will be provided to new employees by BC-HR personnel or imbedded office managers

• Flexibility in how this information is provided to new employees by BC-HR

• BC-HR Checklist & Guide will be located in OSCAR
Business Center HR Checklist Guide

• Created to assist BC-HR with providing essential information to new employees consistently across BC’s.
Finance & Accounting Checklist

Sub-Committee:
* Michael Dooley
* Mitchell Barrington
* Luke McIlvenny
* Jennifer Creighton
Finance and Accounting

• What do we currently face?

• Frustrated employees!
  o Some employees aren’t given the tools or opportunities to learn about purchasing policies.

• Often employees first interaction with the finance part of the house leads to a bad experience (for all parties involved).
Finance and Accounting

• Where do we want to be?
  • Happy employees!
    o Providing information for purchases at the beginning

• Want the first interaction to be helpful and collaborative

• Proactive approach – not reactive
Finance and Accounting

Mind the GAP

How to bridge the Gap?

Finance Checklist – a Psychological Binding tool

Current State

Dream State
Finance and Accounting

• Still missing a key element... how to get new employees in the door?

• We are looking for your help to make us more successful
  o Hand out finance and brochure
  o Give heads up to Finance and Accounting
Central Human Resources
Monthly New Employee Orientation

Sub-Committee:
* Christina Schaaf
  Cindy Myers
  Lori Wolcott
Central Human Resources

Monthly New Hire Onboarding Orientation Sessions

• Being Proactive in Your Start at OSU
• The Terms of Your Employment
  o Role of Employee Relations
  o Employment Categories
  o Holidays, Sick and Vacation Leave
• Performance Evaluations
• Your Benefits
  o Health Insurance (Medical, Dental, Vision, Life, EAP, Protected Leave, Worker’s Compensation)
  o Retirement Programs
  o SEIU Collective Bargaining Information Policies
Central Human Resources

Training Sessions

• Ombuds Services
• Sexual Harassment Training
• Mandatory Reporter Training
• Worker’s Compensation Training
• Safety Training
Central Human Resources
InsideOSU

Office of Human Resources
Inside OSU

New Employee Resources

The New Employee Resources site is intended to help you get acquainted with many of the resources available to you as a new employee and to help you better understand the organization as a whole. It is not meant to be an all inclusive orientation, but it provides a small piece to enhance what you may have received through your department, college, or from other units at OSU.

Enter New Employee Resources

Benefits Overview

OSU offers a comprehensive benefit package that includes medical, dental, vision, disability, life and retirement/savings coverage. Benefits plans vary depending on your employee classification and whether you are part-time or full-time.

Click the link below that most accurately describes your employment status at OSU.

I am:

- Classified Employee
  - Working full-time
  - Working 50% FTE or greater
  - Working less than 50% FTE

- Unclassified Employee
  - Working 50% - 1.0 FTE

LifeBalance OSU

Oregon State University understands that you have many facets to your life, including personal, professional, and academic demands. This website offers information and resources to assist you in balancing the daily demands and opportunities of your life, whether you are a student, faculty or staff member.

Enter LifeBalance OSU
Safety Training

Sub-Committee:  
* Kay Miller

Safety

- New Employee Safety Orientation  
  http://oregonstate.edu/ehs/sites/default/files/new_employee_powerpoint.pps

- "In Case of Emergency" Poster  
  http://emergency.oregonstate.edu/sites/default/files/osu_emergency_poster_8_5x11_1.pdf

- Emergency Procedures – Department of Public Safety  
  http://oregonstate.edu/dept/security/emergency_info/

- Department of Public Safety & Oregon State Police  
  http://oregonstate.edu/dept/security/

- Signing up for Campus Safety Alerts  
  http://oregonstate.edu/helpdocs/safety-and-security/osu-alert
Safety

- Emergency Poster
- Emergency Procedures
- OSU Emergency Plan App
- Dept. of Public Safety and Oregon State Police
- Sign up for Safety Alerts

OHR New Employee Safety Training: Rights and Responsibilities
- Employee rights
- Employee responsibilities
- Supervisor responsibilities
- EH&S resources
Safety Orientation

New Employee Safety Orientation On-line

- Contains links to further information
- Contains links to Hazard Communication information and training*
- Contains link to the General and Office Safety* PowerPoint
- Contains safety contact information

* Required for all employees
Safety Checklist

Provided to Supervisor/Department Contact who will:

• Determine safety training requirements
• Enter the requirements on the form
• See that the new employee completes the training
• Take new employee on a “safety walk”
• Use the form to document the training
• Keep a copy on file and submit a copy to EH&S and then...
• Provide additional job-specific safety training as needed, and document it separately
Safety Checklist

Environmental Health & Safety

Acknowledgement of Safety Instructions, Hazard Communication, General Laboratory Safety, and Emergency Preparation Training (Required for ALL OSU Employees)

Instructions:
1. If you have been asked to complete a hard copy version of this form, an electronic version with active web links is available at http://ehs.oregonstate.edu/fileadmin/pdf/training/Institutional_Safety_Form_2014.pdf

2. Supervisor: Select all Safety Instructions that apply to employees’ jobs on the EH&S website and list them to the left. (There may be more or less than 20.)

3. Employee: Read the Safety Instructions carefully and review them with your supervisor or department head, along with information regarding mandatory training programs, emergency procedures and hazardous communication, outlined below before exposure to potential hazards in the workplace.

4. Employee: Indicate the completion of each activity by Initialing the space provided.

5. Supervisor: Place this completed form in departments' personnel files and send a copy to the EH&S training coordinator (email to ehs@oregonstate.edu or mail to EHS, 100 Oak Creek Building).

6. The Safety Instructions and training list below address general safety guidelines. Many laboratories require additional training for unique, potentially hazardous chemicals, equipment, and operations. Such training must be provided by the supervisor and documented separately.

7. Training documentation forms can be found on the safety training home page under forms.

Employee initials each item below upon completion of training or marks “x” for any items that are not applicable.

Emergency Preparation (Required for all employees) – Initial each item as you review it with your supervisor.

1. Know the location of fire alarm pull stations and fire extinguishers.
2. Know the location of fire alarm pull stations and fire extinguishers in your work area.
3. Know the location of fire hydrants and fire extinguishers.

4. Know the location of exits, escape routes, and emergency evacuation assembly areas.
5. Know the location of automated external defibrillators (AEDs) and find and use.
6. Know how to help in case of an emergency and how to report accidents. An emergency response posting with contact information for the Corvallis campus is available online.

Hazard Communication Training (Required for all employees) – Your supervisor will provide you with an overview of the hazardous materials in your work area to which you may be exposed.

Read the Right to Know Safety Instruction and the Working Safely with Hazardous Materials Booklet.

Note: If you lose the Employee Safety Training Record Booklet, you can download it online at http://ehs.oregonstate.edu/

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Laboratory Safety Training - The following training is required for some OSU employees, particularly laboratory workers and other staff who handle chemicals or occasionally enter labs:

- OSU EH&S Laboratory Safety Training (required before beginning work in a laboratory)
- Hazard Communication: OSHA and Global Harmonization System (required before beginning work in a laboratory)
- Hazardous Materials Awareness Training (required before preparing hazardous materials for shipment)
- Respirator training and fit testing must be completed by employees conduct work that requires the use of a respirator (required annually).
- Bloodborne Pathogen Training is required annually if working with blood, body fluids, tissues, or uninfected cells of human origin.
- Animal handler safety training (online) is required once for those who handle or have significant exposure to animals.
- Radiation Safety Training (various requirements for those who work with radioactive materials or radiation-producing machines)

OSU recommends that all employees review the following as part of their initial safety training:
- Department of Public Safety Emergency Procedures Manual
- Snap Video Office Environmental Safety
- Additional training (Other in lower) is available

General Training for Managers and Supervisors - If you are a manager or supervisor, complete the interactive Supervisor Safety Responsibilities core curriculum.

Fire extinguisher training - OSU employees are not required to use fire extinguishers in the event of a fire. Fire extinguisher training is available for employees who may use an extinguisher in the event of a small fire. Only trained individuals are authorized to use a fire extinguisher at OSU. In the event of a fire, pull the fire alarm, evacuate the building, call 911 to provide information about the location and nature of the fire, and stay at all the evacuation assembly point to provide further information once firefighters arrive.

OSU fire extinguisher training.

Note: The EHS Training Events Calendar is located at http://ehs.oregonstate.edu/ehs/calendar.
Communication & Rollout Plan

Sub-Committee:
* Lori Wolcott
  Kim Cholewinski
  Cindy Myers
  Tracey O’Brien
  Christina Schaaf
  Melanie Rose
# NEO Communications Plan

<table>
<thead>
<tr>
<th>By Who-Sender</th>
<th>To Who-Receiver</th>
<th>What</th>
<th>When</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEO Team</td>
<td>Sponsors, BC Leadership, Business Affairs Leadership</td>
<td>Overview of our project</td>
<td>8/15/2014</td>
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<td>NEO Team</td>
<td>Sponsors</td>
<td>Overview of our project</td>
<td>11/14/2014</td>
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<tr>
<td>Linda Powell, Dave Blake, Lori Wolcott</td>
<td>Becky Warner</td>
<td>Overview of our project</td>
<td>1/23/2015</td>
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<td>NEO Communication Team</td>
<td>Sponsors</td>
<td>Details of website layout</td>
<td>2/5/2015</td>
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<tr>
<td>NEO Team</td>
<td>Website</td>
<td>Details of website layout</td>
<td>February</td>
<td>X</td>
</tr>
<tr>
<td>NEO Communication Team</td>
<td>Sponsors</td>
<td>Draft communication</td>
<td>Work with sponsors on stakeholders for communication</td>
<td>February</td>
</tr>
<tr>
<td>Becky Warner</td>
<td>President's Cabinet</td>
<td>Align on high-end communication messages, talking points, and inform on main design components</td>
<td>4/7/2015</td>
<td>X</td>
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<tr>
<td>Becky Warner</td>
<td>Provost's Counsel</td>
<td>Align on high-end communication messages, talking points, and inform on main design components</td>
<td>4/7/2015</td>
<td>X</td>
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<td>Sponsors</td>
<td>Top Administrators</td>
<td>Align on high-end communication messages, talking points, and inform on main design components</td>
<td>March/April</td>
<td>X</td>
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<td>NEO Team (HR)</td>
<td>HR (BC &amp; OHR)</td>
<td>Inform about main design components and high-level communication messages; outline talking points to ensure consistent messaging across departments</td>
<td>3/16/2015</td>
<td>X X X X X</td>
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<td>NEO Team (Jennifer, Mitchell, Mike)</td>
<td>BC Finance &amp; Accounting</td>
<td>Inform about main design components and high-level communication messages; outline talking points to ensure consistent messaging across departments</td>
<td>March</td>
<td>X X X X X X</td>
</tr>
<tr>
<td>NEO Team (Luke)</td>
<td>BC Managers</td>
<td>Inform about main design components and high-level communication messages; outline talking points to ensure consistent messaging across departments</td>
<td>March</td>
<td>X X</td>
</tr>
<tr>
<td>Becky Warner</td>
<td>Academic Leadership Academy on Onboarding</td>
<td>TBD</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>NEO Team</td>
<td>Executive Compliance Committee for Safety</td>
<td>Inform about main design components and high-level communication messages; outline talking points to ensure consistent messaging across departments</td>
<td>March/April</td>
<td>X</td>
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<tr>
<td>NEO Team</td>
<td>Faculty Senate</td>
<td>Inform about main design components and high-level communication messages; outline talking points to ensure consistent messaging across departments</td>
<td>TBD</td>
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<td>NEO Team draft, from the sponsors (email)</td>
<td>Deans, Directors</td>
<td>Align on high-end communication messages, talking points, and inform on main design components</td>
<td>4 weeks before roll out</td>
<td>X X X X</td>
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<td>NEO Team draft, from the sponsors (email)</td>
<td>Managers, Supervisors</td>
<td>Align on high-end communication messages, talking points, and inform on main design components</td>
<td>3 weeks before roll out</td>
<td>X X X X</td>
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<td>NEO Team Training</td>
<td>Managers, Supervisors</td>
<td>Align on high-end communication messages, talking points, and inform on main design components</td>
<td>2 weeks before roll out</td>
<td>X X X X X X X</td>
</tr>
</tbody>
</table>
Implementation

- Provide training
- Communication
- Completion
- Notification
- Implementation
Survey

Sub-Committee:
* Kay Miller
  Tammy Hubert
  Joey Carson
  Jenna Reeves
Survey

Purpose:

• Systematically collect standardized information directly from the new employees who participate in NEO

• Provide the NEO team and others with information on how well OSU’s NEO program is working to ensure all new hires get off to an optimum start

• Evaluate the NEO program to identify where it can be improved
<table>
<thead>
<tr>
<th>My onboarding experience with the Business Center Human Resources representative…</th>
<th>Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provided me with clear and honest answers</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Was well-organized</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Was accurate</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Thoroughly covered key information</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Made me feel welcome and comfortable</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Took a reasonable amount of time</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Was professional</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Was relevant to my job</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
</tbody>
</table>
Survey

Benchmark:
• All 2014 hires will be invited to take a Qualtrics survey regarding their onboarding experience

After implementation of NEO process:
• OHR - Monthly data pulls from Banner to get new hire information and email addresses
• Emails sent to new employees hired within the past 90-120 days
Survey Timeline

May 1-31 – New Hires

June 1-30 – New Hires

July 1-31 – New Hires

August 1-31 – New Hires
  August 31 - email survey to May New Hires

September 1-30 – New Hires
  September 30 – email survey to June New Hires
Survey Results

• Reports generated and sent to HRMs and sponsors for review and analysis

• Survey Analysis Training provided by Linda Powell

• Quarterly meetings with sponsors, HRMs, and NEO survey committee members to review results and discuss changes/improvements to NEO process
How long will the survey be active?

"To infinity and beyond..."
Questions?

If you want something in your life you've never had, you'll have to do something, you've never done.

~ JD Houston