First Day Checklist

Checklist

- Meet the employee in the lobby on their first day.
    - Managers unable to meet this task should assign it to their Onboarding Ambassador or another staff member.
- Pick up employee badge from the Lobby Attendant at the Front Desk.
- Coordinate Equipment Pick-Up with new employee.
- Have new employee complete the online Security Awareness Training after password has been attained from Service Desk.
- Introduce new employee to the team through a Team Meet and Greet or a Welcome Celebration.
- Review/discuss and sign the employee's duty statement.
    - The duty statement must be signed by both the manager and new employee.
    - Provide the employee with a signed photocopy of the duty statement and retain a copy for your Supervisory drop file. The original signed duty statement is to be routed to Human Resources.
- Meet with the employee in a one-on-one setting.
- Provide desk time for reading and/or desk set-up.
- Have the employee review the information on Central and Onboarding SharePoint site.
- Debrief with the employee at the end of the day.

Talking Points

- Provide a program area overview and describe how the program's role aligns to the CalSTRS Business Plan and objectives. Discuss branch expectations.
- Inform the employee of your communication preferences (email, face-to-face meetings, etc).
- Review the role of the employee's Onboarding Ambassador. Encourage the new employee to ask questions and seek understanding/clarity.

- Review the duty statement and clearly state performance expectations. Review work hours and break schedules.
- Review how to submit a time off request. Review "call-in" procedure (running late and out of the office when sick).
- Advise who to communicate with if manager is out of the office.
- Provide an overview of CalSTRS' mission, vision, core values, culture, ethics, goals and competencies.
- Review the organizational structure and key staff. Review team and individual work assignments.

Tips

- Make time to greet the new employee and show them around the office.
- Put yourself in the shoes of the new employee.
- Encourage the employee to ask questions.
- Avoid bombarding the new employee with too much information on their first day (remember to spread information out over time).

First Week Checklist

Checklist

- Conduct a "check-in chat" to debrief the employee's first week.
- Conduct weekly one-on-ones with the employee.
- Schedule the employee to meet with team members individually to understand what they do and how their jobs will interact.
- Ask how the employee prefers to be recognized.

Talking Points

- Upcoming training(s) the employee will be attending.
- Standing team meetings or events.
- Recurring deadlines.
- How often you'll interact (daily, weekly and so on).

Tips

- Get to know what makes your employee tick and determine what motivates and frustrates the individual. Think about what the employee could accomplish in the first week and clearly define that expectation to the employee.
- Keep in touch with your new employee as they integrate into the organization.
- Actively seek out your new employee to find out how they are doing.
- Make it safe and easy for your employee to ask questions and share what's on their mind.

30-Day Checklist

Checklist

- Provide an overview of the Strategic and Annual Business Plans.
- Ensure Onboarding Ambassador has completed the Learning and Development Checklist within 20 business days of hire.
- Discuss with employee about enrollment into any core classes relevant to their position (such as, Effective Listening, Basic Facilitation, BusinessDirect, Information Mapping, etc).
- Assign more complex work to continue to assess employee progress and abilities.
- Confirm the employee has reviewed and configured their workstation according to the suggestions and instructions
    - If the Ergonomic subsite does not address all ergonomic issues for the employee, an ergonomic evaluation may be requested.

Talking Points

- If the employee is a new manager or supervisor, confirm they have received an email regarding leadership training through CalHR.

Tips

- Give feedback early and often.

- Share stories to help the employee understand the big picture. This will assist them in being successful on the job.
- Keep the lines of communication open. Employees thrive on a good relationship with their manager.

Two to Nine Month Checklist

Checklist

- Conduct regular one-on-ones with the employee.
- Complete probation reports (if applicable).
    - You will be sent a reminder with related forms 30 days in advance of the probationary due dates.
    - Use this reminder as a trigger to schedule time to write and discuss the probationary report.

Talking Points

- Describe work standards and expectations (i.e., completed staff work, customer service orientation, etc).
- Acknowledge employee’s growth and accomplishments.
- If applicable, describe areas where improvement is needed to pass probation, depending on the length of the new employees' probation period, i.e., six or 12 months.

Tips

- Keep the lines of communication open by asking questions and listening.
- Sample questions to ask at the 90-day mark:
    - How does the job compare to what you expected?
    - Are you receiving the information you need to do the job?
    - What roadblocks are you facing?
    - How do you feel as part of the team?
    - What is your role so far?

    - What's the best thing that's happened to you since joining CalSTRS?
    - You offer a fresh perspective; tell me what we can improve on?
    - Have you been recognized for your contribution?

First Year Checklist

Checklist

- Send celebratory 1st year Anniversary email.
- Re-evaluate developmental opportunities.
- Set goals for the coming year.

Talking Points

- Your employee has experienced an entire business cycle. This is a wonderful time to solicit observations and recommendations regarding what CalSTRS can do differently to improve its business.
- How does the employee see themselves contributing to CalSTRS?