Hiring Manager Checklist

Before Day 1

Schedule, Job Duties, & Expectations
- ❒ Submit new staff member's office location, office number, and telephone extension to **Human Resources**
- ❒ Add new hire to email distribution lists relevant to his/her new position
- ❒ Forward scheduled or recurring meetings
- ❒ Schedule meetings with key contacts across campus for employee's first week (or first few weeks)
- ❒ Prepare an individual onboarding schedule for first month: **Onboarding Schedule**
- ❒ Arrange for new employee meeting and pickup from HR at 10:00am on his/her first day (manager, coworker, or mentor, etc.)

Acclimation
- ❒ Notify your department of your new hire. Example: **New Employee Email Announcement**
- ❒ Email new employee a welcome note and attach **New Employee Information Sheet** (request return of sheet before Day 1). The information from this sheet will allow you to personalize his/her welcome experience
- ❒ Assign a coworker to be a mentor to assist with acclimation to Baylor and the department: **Mentor Guidelines**
- ❒ Meet with mentor to review guidelines and how they would like to pursue the mentor relationship

Work Environment
- ❒ Prepare workspace for employees: **Workspace Checklist**
- ❒ Prepare a Welcome Packet to give employee on first day: **Welcome Packet**

Access
- ❒ Access to computer systems needed
- ❒ Order office keys from **Facility Services**
- ❒ Establish building/door access by card-swipe
  - o If access is needed for Robinson Tower, email a request to **Human Resources**
  - o If elsewhere, contact office manager or administrator for instructions (if Baylor ID # is needed for set-up, email **Human Resources**)

Training & Development
- ❒ Remind employee that he/she will attend The Bear Essentials at 8:30am in the HR Training Room (Robinson Tower, Suite 200) on the first day

Day 1

Schedule, Job Duties, & Expectations
- ❒ New employee will attend The Bear Essentials in HR from 8:30am-10am (pick up or send coworker/mentor to greet new employee at HR at 10am)
- ❒ Have a computer available and at least an hour set aside for new employee to complete the "Baylor Bowl" worksheet this afternoon
- ❒ Have a first day meeting with new hire. Suggested meeting outline: **First Day Meeting Agenda**

Acclimation
- ❒ Welcome new employee. Ideas: **New Employee Welcome**
- ❒ Introduce to mentor
- ❒ Take, or have mentor take, new employee to introduce him/her to coworkers
- ❒ Check-in with new hire at end of the day to see how first day went

Work Environment
- ❒ Take new employee to pick up office keys
- ❒ Give tour of the office space
- ❒ Show employee his/her personal work space

Access
- ❒ ITS will set up the computer when they deliver it
- ❒ Provide information on how to set up phone (voicemail): **Baylor Phone Information**

Week 1

Schedule, Job Duties, & Expectations
- ❒ Check-in with him/her daily for about 15 minutes in the morning and at the end of the day
- ❒ Discuss progress on

Access
- ❒ Ensure technology has been fully functional and that employee has access to the required systems
- ❒ Check that employee has understanding of how to use technology and systems

Training & Development
- ❒ Follow up on trainings – Is he/she registered for appropriate trainings and learning what is needed to be successful in this role?
- ❒ Discuss performance goals for first 180 days and enter/have employee enter them into Baylor Compass: **Performance Goals** and **Baylor Compass Website**

Month 1

Schedule, Job Duties, & Expectations
- ❐ Have weekly meetings to discuss progress and acclimation (time and length up to your discretion)
- ❐ Have a first month meeting. Suggested meeting outline: **First Month Meeting Agenda**

Acclimation
- ❐ Meet with employee's mentor to discuss new employee's socialization and acclimation to Baylor

Training & Development
- ❐ Ensure that new employee has attended an Essentials for Success session in HR
- ❐ Make sure employee has received position-specific training as well as university procedure information:
  - o General office procedure training
  - o Computer training
  - o **Purchasing Card Training** (as needed)
  - o **Travel Policies/Procedures** (as needed)
  - o **Web-Time Entry** (as needed)
  - o Budget/**TRAX** (as needed)

Month 3

Schedule, Job Duties, & Expectations
- ❐ Continue to meet regularly (the frequency and length at your discretion)
- ❐ Have a three month meeting. Suggested meeting outline: **Three Month Meeting Agenda**

Acclimation
- ❐ Check-in with employee and mentor

Month 6

Schedule, Job Duties, & Expectations
- ❐ Discuss first 6 months and his/her experience

Acclimation
- ❐ Check-in with employee and mentor – should be the end of their structured relationship

Month 7

Schedule, Job Duties, & Expectations
- ❐ Complete the Staff Performance Appraisal & Planning Process– 180 day review: **Staff Performance Appraisal & Planning**

Year 1

Schedule, Job Duties, & Expectations
- ❐ Complete the Staff Performance Appraisal & Planning: **Staff Performance Appraisal & Planning**
- ❐ Have a first year meeting. Suggested meeting outline: **First Year Meeting Agenda**
- ❐ Celebrate employee's successes and contributions

Tools & Resources

Onboarding Schedule

Performance Goals

New Employee Email Announcement

Mentor Guidelines

Workspace Checklist

Welcome Packet

First Day Meeting Agenda

New Employee Welcome

First Month Meeting Agenda

Three Month Meeting Agenda

First Year Meeting Agenda

Onboarding Schedule
- ☐ **Sample Schedule**
- ☐ **Template for Schedule**

Performance Goals

Tip: When creating performance goals, remember SMART goals.

Specific – target a specific area

Measurable – quantify or at least suggest an indicator of progress

Attainable – state what results can realistically be achieved, given available resource

Relevant – specify why it matters and how it relates

Time-bound – specify when the result(s) can be achieved

New Employee Email Announcement

To: [Department]

From: [Manager – you]

Date: [One week before start date or earlier]

Subject: Welcoming [New Employee]

I am excited to share that [new employee] will be joining our team as [job title] on [start date]. [New employee] will be responsible for [insert brief position overview here].

[New employee] is joining us from [insert brief personal bio here – relevant information].

Please come to [location of welcome gathering] on [date] at [time] to meet [employee] and welcome [him/her].

If you would like to reach out to [new employee], [his/her] current email address is [email address].

Feel free to contact me if you have any questions.

[Manager]

Mentor Guidelines

Selection Criteria/Process:
- ☐ Mentor needs to understand Baylor's culture and environment
- ☐ Should have been at Baylor for at least 1 year
- ☐ Wants to be a buddy
- ☐ Mentors should:
    - o Have time to be accessible and available
    - o Be familiar with employee's work and role
    - o Be a solid performer
    - o Have strong communication and interpersonal skills
    - o Show Baylor's values
    - o Have patience
    - o Be trustworthy
- ☐ Individuals can volunteer or be recommended – hiring manager makes the final decision

Responsibilities
- ☐ Assist with acclimation to Baylor
- ☐ Provide information on policies/procedures
- ☐ Familiarize with Baylor culture, norms, and guidelines
- ☐ Answer employee's various questions

Suggested Structure for Mentors
- ☐ Week 1
    - o Meet for an hour on day 1, over lunch if possible
    - o Cover important and relevant information about position and office
    - o Respond to employee questions
    - o Explain best methods of communication
- ☐ Months 1 & 2
    - o Meet weekly for a half hour
    - o Be available for phone conversations and email
    - o Help new employee get to know people in office
- ☐ Months 3 & 4
    - o Meet bi-weekly for a half hour
    - o Be available for phone conversations and email
- ☐ Months 5 & 6
    - o Meet monthly for an hour
    - o Decide on how to continue mentor relationship

Workspace Checklist
- ☐ Prepare desk
    - o Pens/pencils
    - o Tape
    - o Stapler
    - o Sticky notes
    - o Legal pads
    - o Scissors
    - o Paperclips
- ☐ Computer – contact the **HELP Desk** to order a computer or prepare an existing computer
- ☐ Phone (in office and/or Baylor cell phone) – **click here** for more information about Baylor phones
- ☐ Contact **Facility Services** for nameplate/door/etc.
- ☐ Order business cards for new employee (as needed) from **Printing Procurement**

Welcome Packet
- ☐ Welcome letter
- ☐ Org chart of the office
- ☐ Office map
- ☐ Campus map
- ☐ List of frequently used phone extensions
- ☐ Parking information
- ☐ Performance plan for first month

First Day Meeting Agenda

Welcome Packet
- ☐ Give employee their Welcome Packet (see above)
- ☐ Discuss the first month performance schedule
- ☐ Explain their job duties, your expectations of them, and your goals
- ☐ Explain how employees role fits into the department and how the position supports the University
- ☐ Review other documents in Welcome Packet (parking, phone extensions, etc.)

Office Protocol
- ☐ Explain appropriate dress (Spirit Fridays)
- ☐ Give instructions on how to enter/exit building/office
- ☐ Office hours
- ☐ Direct them where to find timesheets and/or payroll information (BearWeb, timecards, payroll dates, etc.)
- ☐ Share practice for requesting vacation days
    - o For monthly staff, instruct on use of **Monthly Absence Report**
- ☐ Share any other office-specific rules

Employee Expectations
- ☐ Discuss the employee's expectations and goals
- ☐ Ask how you can help him/her achieve his/her expectations and goals

New Employee Welcome

- ❐ Provide a welcome breakfast, lunch, snack with most of department present
    - o Maybe have a team lunch or manager-employee one-on-one lunch
- ❐ Use **New Employee Information Sheet** to pick out one of their favorite candies, flowers, etc.
- ❐ Get them a welcome card from the whole office
- ❐ Decorate their work space

First Month Meeting Agenda

- ❐ Review progress on performance plan
- ❐ Discuss his/her first month's experience – give employee feedback and welcome his/her feedback
- ❐ Discuss his/her comfort with training received and overall knowledge of how to do his/her position
- ❐ If needed, create a new performance plan for second month

Three Month Meeting Agenda

- ❐ Discuss first 3 months and his/her experience
- ❐ Review performance with employee
- ❐ Provide positive and constructive feedback

First Year Meeting Agenda

- ❐ Discuss how employee's expectations of this position fit the reality of the position
- ❐ Discuss what has been working, what has not, what they need more of, etc.
- ❐ Set goals and expectations for the coming year
- ❐ Continue to provide feedback and welcome it in return
    - o Elicit feedback on onboarding process and how it can be improved, and share appropriate information with HR