# Welcome Aboard: Planning for New Employee Success

Emily Rogers, Deputy Director

Brown County Library

# What is Onboarding?

- Onboarding is the **organized** method by which you bring a new employee into your library. It ensures that each employee is given the **tools** for **success** from meeting coworkers and getting a tour, to training on individual tasks.

Employees

Volunteers

# Who should be onboarded?

# Overview

- Interviews
- Onboarding Toolkit
- Orientation Checklist
- Before the Employee Starts
- After the Employee Starts

# Onboarding Starts in the Interview

- Share information
  - Overview of library and community
  - Funding source
  - Job specific information
- Tour
- Why?
  - First impressions count
  - Increase advocacy
  - Generate excitement
  - Build understanding

# Offer Letter: Information to Include

| Wage | Hours |
|------|-------|
| **Direct Supervisor** | **Benefits** |
| **Who will meet them the first day** | **Information about the Library** |

# Offer Letter: About the Library

**Mission**

**Vision**

**Values**

**Overview**

**Confidentiality**

**Dress Code**

**Parking**

# Onboarding Toolkit

## ON-BOARDING TOOLKIT:

**The BCL Managers Guide to New Employee Orientation**

Brown County Library
It's Yours.

X:MSOffice:Administration:Human Resources: OnBoarding: OnBoarding ToolKit
W:Human Resources- Staff:Onboarding: OnBoarding ToolKit

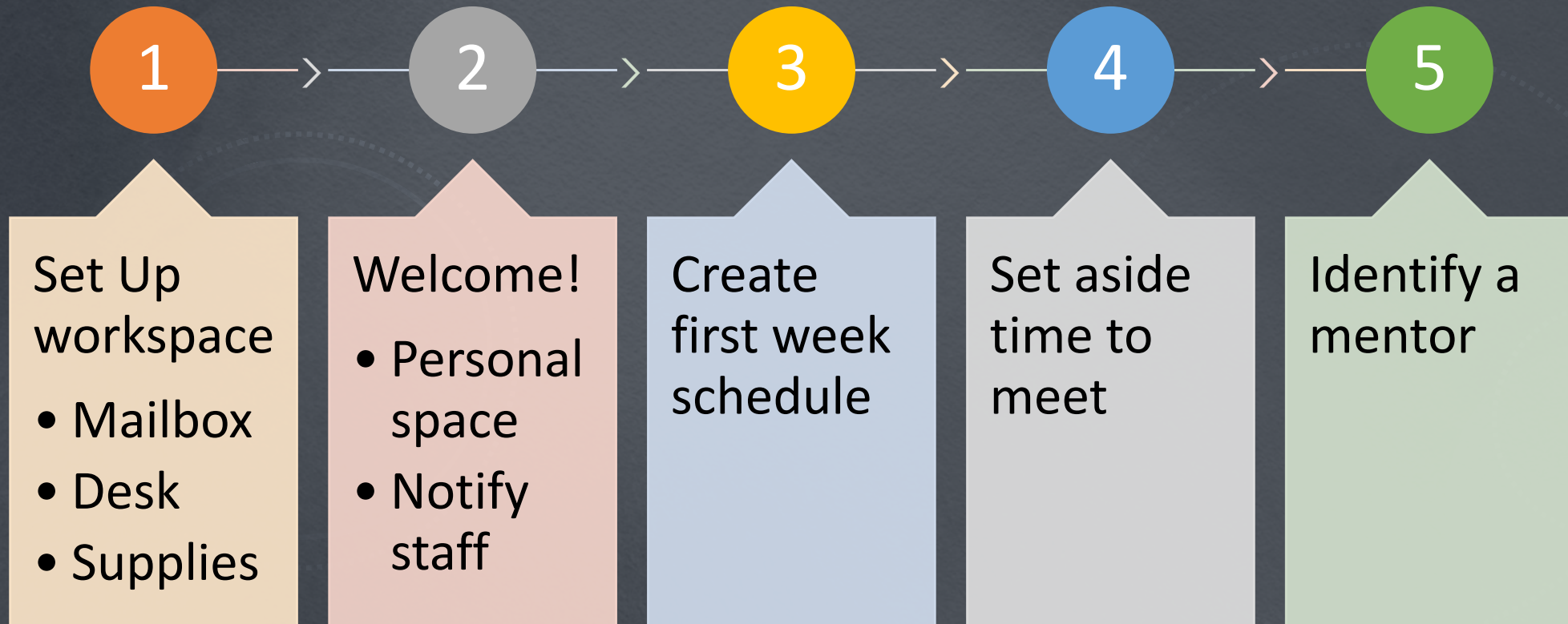## TABLE OF CONTENTS

# Onboarding Toolkit

**Setting up Access**

- Email
- Timekeeping system
- Computers and shared drives
- Special software
- ILS
- Phone

**Order Name Tag**

**Order Business Cards**

**Order Keys**

# Onboarding Toolkit

**1**

Set Up workspace

- Mailbox
- Desk
- Supplies

**2**

Welcome!

- Personal space
- Notify staff

**3**

Create first week schedule

**4**

Set aside time to meet

**5**

Identify a mentor

# Onboarding: Mentor

Why?
- ❑ Acclimate to work culture
- ❑ Provide support
- ❑ Take a break
- ❑ Assist with questions

Who?
- ❑ Knowledgeable
- ❑ Positive
- ❑ Welcoming

# Orientation Checklist

Brown County Library

## New Team Member Checklist

**EMPLOYEE INFORMATION**

| Name: | Start date: |
|---|---|
| Position: | Manager: |

**FIRST DAY(s)**

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

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

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

**Forms to Complete**
- ☐ Employee Conduct Agreement
  - Sign, date, forward to Deputy Director
- ☐ Ethical Compliance Statement
  - Sign, date, forward to Deputy Director
- ☐ Job Description
  - Sign, date, forward to Deputy Director
- ☐ Customer Service Standard
  - Sign, date, forward to Deputy Director
- ☐ Emergency Contact
  - Make copy for supervisor file and forward original to Deputy Director
  - Add to Branch Emergency Contact list on M:drive under Human Resources-Management/Emergency Phone Contacts
- ☐ Customized Feedback Form
  - Keep in supervisor file

**FIRST MONTH**

**Schedule Meetings with Administration and Other Staff as Appropriate:**

| | | |
|---|---|---|
| ☐ Executive Director | ☐ Finance Manager | ☐ Facilities Manager |
| ☐ Deputy Director | ☐ Community Engagement Manager | ☐ IT Specialist |

Brown County Library

| | | |
|---|---|---|
| ☐ Collection Development Manager | ☐ Safety Officer | ☐ Local History & Genealogy Manager |
| ☐ Mailroom Clerk | ☐ Central Manager | ☐ Administrative Associates |

**Review from Employee Handbook:**

| | | |
|---|---|---|
| ☐ Personal, Casual, and Vacation Leave | ☐ Mission and Strategic Plan | ☐ Employee Assistance Program |
| ☐ Extra Hours | ☐ Discipline & Grievance Procedures | ☐ Travel and Meetings |
| ☐ Breaks | ☐ Harassment | ☐ Staff Reorganization or Reassignment |
| ☐ Holidays | ☐ Problem Resolution Procedure | ☐ Performance Evaluation |
| ☐ Employee Conduct | | |

**Emergency Procedures**

| | |
|---|---|
| ☐ Emergency Manual | ☐ Emergency Closings |

**MONTHS 2-3**

☐ Review from BCL Website
- About the Library
- Support
- Catalog
- Kids/Teens/Adults
- Books, Movies, & More
- Research
- Services

☐ Review from Staff Intranet or Training Manual
- Collections
- Handbook
- Training Materials
- Committees
- Staff Directory
- Helpful Links

☐ Continuing Education Opportunities
- Brown County Library
- Nicolet Federated Library Systems (NFLS)
- Wisconsin Library Association

☐ Phone
- How to Use
- Voicemail
- Customer Service on the Phone

# First Day(s)

- Items to review

- Action items

- Tour

- Forms

## FIRST DAY(s)

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## Customizing Feedback

| | |
|---|---|
| | |

Employee Name                                         Date

1. What are the hobbies and interests that you most like to talk about?

2. What increases your positive emotions or "fills your bucket" the most?

3. From whom do you like to receive recognition or praise?

4. What type of recognition or praise do you like best?
   ☐ Public    or    ☐ Private
   ☐ Written   or    ☐ Verbal

## Customizing Feedback

**This section pertains to receiving critical or difficult feedback.**

1. Setting – Where I prefer to receive feedback (in public, privately, in a closed door meeting, with someone else present, etc.):

2. Timing – When I prefer to receive feedback (morning, afternoon, start of shift, end of shift, take me to lunch, as soon as possible, etc.)

3. If you want to give me critical/difficult feedback make sure you (give specific examples, provide actionable items to improve on, provide examples of how to do things differently, etc.)

4. You can "trigger" my hot button by (being rude, not listening, writing it, swearing, etc.)

# Customized Feedback From

# Customer Service Standards

## BCL Customer Service Standards

The Brown County Library provides welcoming and safe spaces in which the diversity of the human experience is valued and respected.

We expect our staff members to provide exceptional customer service to the public and to co-workers. This quality service is provided to all customers regardless of age, race, gender identity, nation of origin, sexual orientation, housing status, religion, income, educational background, physical or mental ability, political views, or any other criteria that could be a source of discrimination or bias. BCL employees are required to adhere to these standards during worktime hours.

- Courteous
  - Be courteous to everyone.
  - Greet customers and co-workers promptly and politely using established etiquette protocols as reviewed in our training documentation.
  - Be respectful and sensitive to circumstances and diversity.
  - Present an approachable, friendly demeanor and offer assistance.
  - Listen attentively and avoid interruptions.
  - Communicate in ways that are clear and easy to understand, using sensitive and appropriate vocabulary based on the situation, without the use of jargon or curse words.
  - Use the 5-10 rule when practical. When a customer or co-worker is within five feet of a staff member, the staff member should acknowledge and greet the person. When they are within ten feet of a staff member, the staff member should make eye contact and smile. All customers should be acknowledged when they enter the building.
  - Limit food and beverage consumption while working on a service desk and keep out of public view. Chewing gum is not permitted when working with the public.

- Service Oriented
  - Seek understanding by rephrasing and asking questions (see Reference Interview training for examples).

# Employee Conduct Statement

## Employee Conduct Agreement

The following definitions and statements were created by the employees of Brown County Library to represent our collective core behaviors. Although we may not do these things perfectly, these are the behaviors we strive to embody and guide us in everyday decisions and actions. These values are what drive our success as an organization and ensure a welcoming environment for all:

**Professionalism** is being knowledgeable about and working towards the common goals of your immediate team, which align and support the overall goals and mission of the organization. It is setting your ego aside to be part of the larger team. It requires openness to constructive feedback and the ability to own mistakes and learn from them. We should support all members of the BCL team and also be willing to ask for assistance when appropriate. Employees should be honest, knowledgeable, and demonstrate follow-through. Professionalism is the ability to remain calm and respectful in all situations, and take pride in the work that we do. We do not complain or blame when issues arise, but focus on effective solutions. We find ways to make the impossible possible by not limiting ourselves with roadblocks and barriers.

**Empathy** is the ability to connect with a part of yourself that reflects what the person(s) on the other side of the interaction is going through. Active listening, patience and understanding are required, and judgement must be withheld. We do not judge people on their worst moments but encourage and help them to develop into the best version of themselves. Empathy is expected to apply in all directions (with all colleagues up, down, across, and throughout the organization and with the public). It does not necessarily mean agreeing with the other person(s). It is showing compassion and genuine concern for another while recognizing our differences. Empathy has boundaries and requires recognizing when and how to help in the right way.

**Adaptability** is openness and willingness to change and try new things with enthusiasm. Nothing is wed to tradition. "This is the way we've always done it" is not an acceptable answer. Through our optimism and positive thinking, we create a culture of creativity, innovation, and collaboration. Calculated risk-taking and failure are accepted as part of our growth. The goal is to be a problem solver rather than a problem bringer, to live in the present, and look to the future. While change requires time and thought, to remain relevant, flexibility must be embraced. We control our future by engaging in meaningful action, and accepting that we may make mistakes along the way. We invest in our future by continuously growing both professionally and personally and never settle for status quo.

**Respect** is setting aside judgement in your actions of how you think about and speak to or about someone. It is recognizing the value each of us brings to our roles and must be applied in all directions (with all colleagues up, down, across, and throughout the organization and with the public). We must be patient, calm, and assume positive intent with each other. To build trust, open and honest communication is required with a willingness to listen and accept decisions that are made. Gossip is not tolerated. We value diverse thinking and speak openly with each other. We do not avoid difficult conversations, but rather speak our views kindly. We work through difficulties doing the "right thing" not always the "easy thing." We must strive for mutually beneficial wins, rather than creating win-lose scenarios. Living in the present is expected, not letting past interactions influence our current reality.
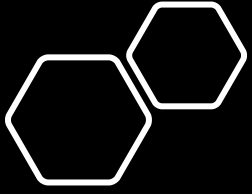
# First Month

- Connect with other staff
- Review specific sections of handbook

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First 2-3 Months

# Easy Access

Supporting documents
Clerk Training Checklist.pdf - Shortcut ☁
New Employee Orientation Checklist.pdf ⟳
OnBoarding ToolKit.pdf ⊘

About The Library.pdf ☁
BCL Location Map.pdf ☁
BCL website orientation - training tool.doc ⊘
Customer Service - Phone.pdf - Shortcut ☁
Customized Feedback Form.docx ⊘
Customized Feedback Form.pdf ⊘
Emergency Contact Form.docx ⊘
Employee Behaviors and Conduct Agreement.pdf ⊘
Ethical Compliance Statement - 10-6-2021.pdf ⊘
H_1 Privacy and Confidentiality - Shortcut ☁
Intranet Basics.pdf - Shortcut ☁
Key Card Access ☁
Logging Into Email.pdf - Shortcut ☁
N_10 Appearance - Shortcut ☁
Sample Orientation Schedule.docx ☁
Table of Organization 2021 Update.pdf ☁

# Building your Work Relationship

- Meet Regularly
  - Allows time to get to know one another
  - Give and receive feedback
  - Normalize meeting
  - Check in on goals and projects
  - Demonstrate value of each employee

# Meeting with your Employee

| | | | |
|---|---|---|---|
| How is the job going? | Is the training meeting needs? | Additional tools needed? | How is your mentor doing? |
| How do you feel you are doing in role? | Co-worker relationships? | Do you have any suggestions for improvements? | Anything you would like to share? |

# Questions ❓

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It's Yours.