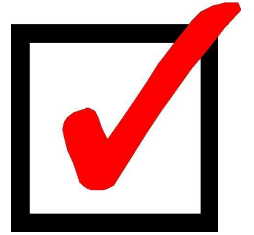# Onboarding Checklist

The 4Cs are a component of a process of training new hires called Onboarding. New hire retention and success are the goals. The 4Cs include Compliance, Connection, Clarification and Culture. We have provided a short definition of each of the 4Cs along with a list of topics applicable to training library employees. This list could be used as a checklist of sorts as a starting point for training at your library.

✔ Compliance

Compliance includes teaching employees basic legal and policy-related rules and regulations.

- ☐ MLIS degree documentation
- ☐ New Jersey Librarian Certification documentation
- ☐ Employee or personnel manual
- ☐ Benefits (medical, dental, vacation, sick, retirement, discounts, holidays, gym, etc.)

Federal Law

- ☐ Federal Family Leave (FMLA)
- ☐ Workers Compensation
- ☐ Unemployment

State Law

- ☐ New Jersey Family Leave (NJFLA)
- ☐ Child Labor Laws
- ☐ Disability. Civil Service
- ☐ W-4 form

Policies

- ☐ Training and staff development
- ☐ Travel reimbursement
- ☐ Performance review
- ☐ Personnel records
- ☐ Sexual harassment
- ☐ Staff obligations
- ☐ Discipline/Remedial action
- ☐ Workweek
- ☐ Official signing of contract

✔ Connection

Connection refers to the vital interpersonal relationships and information networks that the new employees must establish—Social integration.

Before the new employee arrives

- ☐ Supervisor assigns a peer/mentor
- ☐ New employee name is added to systems/phone & email lists/mailboxes
- ☐ Staff is notified that a new employee is coming
- ☐ Workspace is made ready with essential supplies and welcome note/trinkets
- ☐ Supervisor/First contact person contacts the new team member with information about:
    - __ Start time/date
    - __ Whom to ask for/intake team member should really be aware, be present
    - __ Entrance/Exits
    - __ Parking - where, what to avoid, metered
    - __ Lunch invitation
    - __ First Day/week schedule

First Day, the mentor or supervisor

- ☐ Posts a welcome banner in library to make public aware of new team member
- ☐ Meets new hire at door with name tag
- ☐ Explains training process and next steps in training
- ☐ Explains importance of wearing name tag (if such is the case)
- ☐ Shows safe storage of personal items
- ☐ Introduces new hire to staff
- ☐ Completes all personnel paperwork
- ☐ Provides a new hire with a job description
- ☐ Provides mission and vision statement/objectives of department
- ☐ Provides a list of names and positions of staff
- ☐ Explains the job titles/chain of command/department/organizational chart
- ☐ Explains library's governing body and stakeholders
- ☐ Gives history of library/branch/system/etc
- ☐ Provides copy of the library's mission, vision statements and strategic plan
- ☐ Provides contact number for emergency and calling tree plan
- ☐ Shows location of time sheets or time clock and covers how to complete or process
- ☐ Explains any lunch/staff room customs
- ☐ Has lunch with new team member
- ☐ Explains procedure for calling out sick, requesting vacation, inclement weather policies & procedures
- ☐ Helps set up phone, greeting, voice mail messages, email
- ☐ Explains how to log into systems: shared drive/intranet, ILL,
- ☐ Help get an ID card
- ☐ Provides list of who to contact for… (printer issues, copier problems, security, building, patron complaints or issues, weather updates etc.)

Building Tour (to be completed by the end of first week)
- ☐ Location of training or emergency notebooks
- ☐ Emergency exits and evacuation plan
- ☐ Alarm locations and information

✔ Clarification

Clarification refers to ensuring that employees understand their new jobs and all related expectations. What is their role? How are standards and competencies aligned with the vision and goals of the organization? (Performance will suffer if expectations are ambiguous.)

- ☐ Emphasize the library relies on communication and teamwork
- ☐ Explain departmental goals as well as individual job responsibilities
- ☐ Required statistics keeping and reporting
- ☐ Supervisory duty expectations explained (staff, volunteers, students, etc)
- ☐ Expectations for time of arrival and departure
- ☐ Length of breaks and how planned
- ☐ Software training
- ☐ Phone etiquette expectations
- ☐ Book shelving training
- ☐ Database training
- ☐ Interlibrary loan process training
- ☐ Review questions frequently asked by patrons
- ☐ Customer service training
- ☐ Opening and closing procedures
- ☐ Where to find supplies, keys, etc
- ☐ Computer reservation system training
- ☐ Collections - acquisitions/weeding expectations
- ☐ Liaison expectations
- ☐ Instruction or training expectations
- ☐ Programming or outreach expectations
- ☐ Collections tour - library map (special requirements or restrictions?)
- ☐ Room use
- ☐ Equipment use
- ☐ Chat/email/IM reference procedures
- ☐ Item request/purchase procedure

✔ Culture

Culture is a broad category that includes providing employees with a sense of organizational norms—both formal and informal. Employees will develop an understanding of the organization's politics, values, and unique language.

- ☐ Philosophy, mission, history, strategic plan - what is the library known for?
- ☐ Library's Assumptions, Values and Artifacts
- ☐ Organization's style: Team oriented? Competitive? Goal oriented? Innovative?
- ☐ Standards and competencies
- ☐ Communication plan
- ☐ Customer service expectations (What does the library expect? What do patrons expect?)
- ☐ Library's computer filtering policy and rationale
- ☐ Policies and procedures - food & drink, cell phone use, sleeping in library
- ☐ Schedules
    - ＿ work schedules (time clock, timesheets, flexible schedules, work remotely, arranging service desk switches, what is a sick day, requesting leave or vacation, inclement weather)
- ☐ Professional development – expectations, time allowed and reimbursement
- ☐ Maintaining the library – expectations and staff roles
- ☐ Systems training/expectations/career pathways
- ☐ Budgetary responsibilities/employee ethics/gifts
- ☐ Leadership expectations
- ☐ Emergency management/evacuation plan: Federal, State, Municipal government driven?
- ☐ Person in Charge: what to do in the case of Megan's Law, receipt of subpoena, etc.
- ☐ How and to whom to report incidents with patrons; What should patron be told?

✔ Suggested Reading:

Fursman, R. (2014). Onboarding a new hire. *Public Management*, 96, 12-18.

Mathis, R. L., Jackson, J., & Valentine, S. (Eds.). (2013). *Human resource management*. Boston, MA: Cengage.

Nkomo, S., Fottler, M.,& McAfee, D. (Eds.). (2010). *Human resources management: Applications, cases, exercises, incidents, and skill builders*. 7th edition. Boston, MA: Southwest Cengage.

Oakes, K., & Galagan, P. P. (Eds.). (2011). *The executive guide to integrated talent management*. Alexandria, VA: ASTD Press.

Who says onboarding can't be fun? (2014). *HR Specialist,* 12, 5.