

# DoD Onboarding Guide

---

## "You have a new team member coming on board."

**Did you know?** Research has shown that employees whose managers provided them with a good onboarding experience greatly benefitted.

These employees:

- ✓ Were productive two months sooner.
- ✓ Stayed with their organization three years or more.
- ✓ Suffered less from "new job remorse".
- ✓ Are much less likely to be injured at the new location.

### The Importance of Onboarding

*"Good government starts with good people. Finding those people, hiring them, and keeping them on board are essential for revitalizing our federal government and transforming the way our government works."*<sup>1</sup>

According to the Partnership for Public Service (PPS), "Onboarding is the process of integrating new employees into an organization and equipping them to become successful and productive." It is an ongoing process and requires involvement from all levels. Investing time up front with your new employee and ensuring he or she has a strong foundation and positive onboarding experience will have a big payoff in the future. You can use the time between acceptance of the tentative employment offer and the start date to maintain contact with the new employee. This will create a positive impression and reinforce the decision made to accept the employment offer.

### Distinguishing Onboarding from Orientation

It is common to confuse onboarding with orientation. Orientation is the series of events focused on assisting the employee on their first day or week, is driven largely by Human Resources (HR) requirements, and includes things such as completing benefits forms (Health Insurance, Life Insurance, Thrift Savings Plan, and so on) and orienting the individual to personnel-focused activities.

Onboarding, on the other hand, is a strategically-focused process of acculturation spanning the time from acceptance of the job offer through the first year of employment. It integrates senior leadership, stakeholders, managers, and employees and addresses all the employees' needs, including mentoring, training, networking, goals, and productivity.

---

<sup>1</sup> What's My Role: A Step-by-Step Hiring Guide for Federal Managers [Partnership for Public Service, October 2010. [http://colorado.feb.gov/useruploads/files/what\\_s\\_my\\_role\\_a\\_step-by-step\\_hiring\\_guide\\_for\\_federal\\_managers-%5B2010.10.15%5D%5B1%5D.pdf](http://colorado.feb.gov/useruploads/files/what_s_my_role_a_step-by-step_hiring_guide_for_federal_managers-%5B2010.10.15%5D%5B1%5D.pdf)]

# DoD Onboarding Guide

## Onboarding vs. Orientation

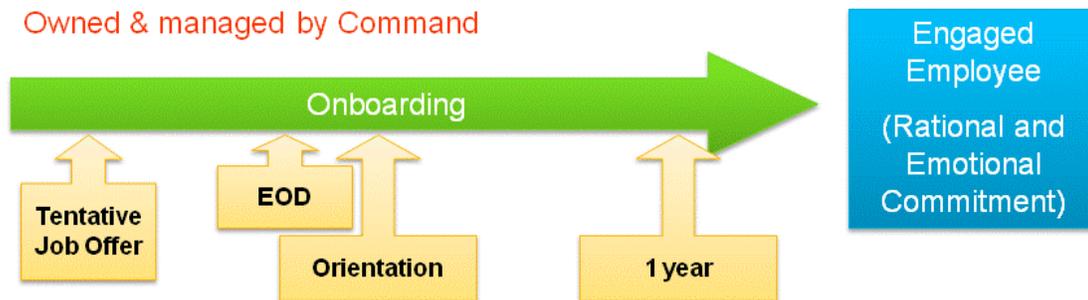
A *process* not an *event*

### Onboarding

- Strategic focus
- Builds engagement from 1<sup>st</sup> contact up to 1 year of employment
- Starts before employee's 1<sup>st</sup> day
- Addresses all new employee needs (mentoring, training, networking, goals, productivity)
- Integrates senior leadership, stakeholders, managers, employees
- **Owned & managed by Command**

### Orientation

- Transactional focus
- < 1 week; ends around EOD
- Starts on employee's 1<sup>st</sup> day
- Addresses some new employee needs (benefits, work schedule, pay)
- Owned & executed by HR



### The Benefits of Effective Onboarding

Ensuring your employee is onboarded effectively helps your new employee and you begin a partnership that:

- ✓ Is the critical link to helping your employee make a successful adjustment to the new job and become a productive team member.
- ✓ Fosters an understanding of the organizational culture and values.
- ✓ Helps the new employee develop a positive working relationship by building a foundation of knowledge about the work unit's mission, objectives, policies, organization structure, and functions.
- ✓ Helps your employee feel welcome, understand basic organizational procedures, and become familiar with the bigger picture.
- ✓ Helps employees understand his or her role, how he or she fits into the Component and work unit, how his or her job impacts other team members and the agency's mission and goals, achieve objectives, and shorten the learning curve.

# DoD Onboarding Guide

---

- ✓ Helps them become part of the team quicker, feel a sense of accomplishment, and validate their decision to come to work for you and your organization.

**call out box:** Managers should monitor the performance of the new employee during their probationary period to determine if they are a fit for the organization and similarly, if the organization is a fit for them.

Remember that onboarding benefits current federal employees as well.

## Your Role in the Onboarding Process

*What should I cover?* Employees typically ask the following questions:

- ❖ Where can I find everything?
- ❖ How do I find my way around my work area? Around the building? Around the local area?
- ❖ What do I need to know about safety and security in my work area?
- ❖ How and when do I get paid?
- ❖ What are my hours?
- ❖ Who do I contact if I'm going to be absent?
- ❖ What do I need to do to set up my work area?
- ❖ Who do I go to for information and additional resources?
- ❖ What is this new job really about?
- ❖ What are my immediate priorities?
- ❖ What resources are available to help me do my job successfully?
- ❖ How is my work performance evaluated?
- ❖ Who are my teammates and what do they do?
- ❖ What are the work area policies?

The manager:

- ✓ May consider assigning a sponsor to work with the new employee at the time of the offer letter.
- ✓ Prepares for onboarding an employee by having a binder or electronic resources with the following up-to-date information:
  - ❖ Organizational Charts
  - ❖ Job Descriptions and performance plans
  - ❖ Work area maps
  - ❖ Department mission, vision, and goals
  - ❖ Area newsletters and websites
  - ❖ Other site specific material
- ✓ Meets regularly with the employee to answer questions, recommend training activities, review policies and procedures, and discuss any employee concerns.

# DoD Onboarding Guide

---

A sponsor:

- ✓ Is a voluntary role.
- ✓ Initiates contact with the new employee as soon as possible after a firm offer has been made.
- ✓ Typically serves (as a sponsor) from the time of the offer letter to about a month following the new employee's entrance on duty.
- ✓ Provides the assistance the employee needs to get settled into the organization, their workplace, and information about the local area (e.g., suggests temporary lodging, local transportation, etc.).
- ✓ Helps with day-to-day questions.
- ✓ Maintains contact with the new employee and provides an alternate contact if necessary.
- ✓ Consults with the manager or someone within the organization for further guidance on how to respond to a particular issue if unsure what to do.

**SPECIAL NOTE:** As a manager or sponsor it is essential to create an environment where all employees have access to communications, information, and learning and development opportunities. Section 508 of the Rehabilitation Act requires agencies to provide employees and members of the public who have disabilities access to electronic and information technology that is comparable to the access available to individuals without disabilities. DoD established the Computer/Electronic Accommodations Program (CAP) in 1990 to improve accessibility for people with disabilities throughout the DoD and remove the cost of accommodations. CAP's services assist in creating work environments that are more accessible to employees with hearing, visual, dexterity, cognitive and communication impairments. For more information, go to <http://tricare.osd.mil/cap/>.

By properly onboarding the new employee, you will maximize the value of your investment in new talent by increasing their opportunity for greater productivity and the likelihood they will stay with the agency.

# DoD Onboarding Guide

---

## Supplemental Onboarding Worksheets

Worksheets can help in organizing the information you need to gather and present during the onboarding process. When making use of these worksheets in your work unit, find a way to be creative; add questions, activities and resources; and make it fun and interactive for your new team member. Remember: the more you are able to do now to bring your new team member on board, the quicker they will be able to contribute to the team.

**call out box:** See Onboarding Checklist

Included in this collection are supplemental Onboarding Worksheets for:

1. Pre-Board/Before First Day
2. Welcome/First Workday
3. Building Familiarity/First Week
4. Acculturation & Collaboration/First 90 Days
5. Continual Development/First Six Months & Ongoing

Also included in this collection are:

- Sample Sponsor Personal Letter
- Newcomer Needs Assessment Checklist
- Welcome Packet (Pre-Arrival)
- Supply Checklist
- Quick Reference Numbers

# DoD Onboarding Guide

---

<b>Onboarding Worksheet – Pre-Board / Before First Day</b>
--

Employee Name: \_\_\_\_\_

Task	Completed?
Identify a sponsor and have sponsor initiate contact	
Extend personal welcome to employee	
Communicate first day logistics to employee	
Send the Organization’s Welcome Packet in advance and/or through an online portal access, if available ( <i>see attachments</i> )	
Ensure that work space essentials and reasonable accommodations are ready	
Request computer and network access with IT as necessary	
Announce pending arrival of new employee to staff and stakeholders	
Plan initial work assignments for the new employee for their first week	
Assist with temporary lodging and transportation to be available upon arrival if applicable	

***Additional Options for Establishing a More Robust Onboarding Program***

- Remind employee to bring appropriate documentation
- Check Director, or Deputy Director calendar and set up appointment to meet with the newcomer within first 2-3 weeks
- Have a "Welcome to...." Greeting Sheet and team members write a welcoming message to the employee. Post it in their work area.
- Have each teammate write a short biography accompanied with their picture. Compile these in one document and give to the new employee.
- Display pictures of team members, department leaders, etc. in a central area for easy reference. (This is a nice job aid for both new employees and customers).

# DoD Onboarding Guide

## Onboarding Worksheet – Welcome / First Workday

Employee Name: \_\_\_\_\_

Task	Completed?
Ensure completion of initial in-processing	
Have leadership share the mission and values	
Provide necessary online material, handbooks or guides – including workplace norms (e.g., leave, lunchtime, work hours, breaks, dress code, etc.)	
Provide organizational charts and contact lists	
Schedule formal new employee orientation	
Have sponsor and coworkers meet new employee	
Give a tour of the building, the office, and essential facilities	
Check-in with the employee at the end of the day	

### ***Additional Options for Establishing a More Robust Onboarding Program***

- Acquire organizational in-process checklist, make appointments for the newcomer to meet with each POC on the checklist, and escort the newcomer to each POC.
  - Meet the newcomer to accompany him/her to the Human Resource Office (HRO). If TDY, exercises or work schedules prevent this, inform your manager so an alternate sponsor can be selected.
  - In-Processing – completing necessary paperwork and administrative requirements to get the new employee into the personnel system; taking the “Oath of Office”; and enrolling in benefits programs. Your Human Resources (HR) Professional will direct activities within this phase.
  - Accompany newcomer to obtain government and vehicle IDs
  - Accompany newcomer to duty section
  - Introduce newcomer to manager and fellow coworkers
- Site Orientation – this may be a physical (walking) tour, handouts, or access to online information about the local area and its activities, your building and its facilities, local professional organizations, parking policies, dress code, transportation and food options, etc. If possible, complete a tour of the site facilities to locate people and areas of the facility. Discuss:
  - Parking
  - ATMs
  - Designated Smoking Areas

## DoD Onboarding Guide

---

- Personal storage
- Cafeteria, break facilities, refrigerator
- Restroom locations and restroom key/codes, if applicable
- Map of the surrounding area including public transit locations, restaurants, drug store/pharmacy, etc.
- Discuss Safety:
  - Hazard reporting
  - Accident Reporting
  - Emergency Procedures
  - First Aid
  - Employee rights and responsibilities under the safety program
  - Safety, health, and fire protection inspections
- Discuss Security:
  - Building access
  - Keys, codes, ID cards
  - Safeguarding personal belongings
  - Complete security procedures
- Senior Leader Welcome – a senior executive or representative welcomes the employee and may show a multimedia overview of the organization.

# DoD Onboarding Guide

---

## Onboarding Worksheet – Building Familiarity / First Week

Employee Name: \_\_\_\_\_

Task	Completed?
Provide position description, explain job scope, and set performance expectations	
Discuss key contacts and required business processes	
Provide extended tours and introductions	
Familiarize employee with key stakeholders and senior leaders	
Provide initial work assignments – either training or substantive work – and ensure the assignments are understood	
Discuss essential and developmental training opportunities	

### ***Additional Options for Establishing a More Robust Onboarding Program***

Agency Orientation – this may be web-based; new employees learn about the history and mission of the organization, its customers, expectations, culture, development opportunities, and employee recognition. This generally occurs over a 30-day period and is completed by the employee at their workstation. Contact your Component or Servicing Agency to determine what web-based content and resources are available.

# DoD Onboarding Guide

---

**Onboarding Worksheet – Acculturation & Collaboration / First 90 Days**

Employee Name: \_\_\_\_\_

Task	Completed?
Provide training essential to job performance	
Initiate Individual Development Plan	
Monitor performance and provide feedback	
Seek feedback from employee on their initial experiences	
Have employee meet with stakeholders – including staff from other departments and external partners	
Assist employee with understanding DoD and organizational culture	
Identify and provide opportunities to participate in organizational activities	

***Additional Options for Establishing a More Robust Onboarding Program***

\*\* NOTE: Beyond the newcomer’s reporting date, the sponsor should remain available to answer questions and provide assistance.

Job Orientation – this is an on-going phase focused on enabling employees – new, seasoned, or transferred employees – to understand the job, their role on the team, and how their work contributes to the mission of the agency or organization. Since this phase is ever-evolving with the changes that impact the agency, managers and sponsors are reminded to remain vigilant in keeping the team apprised of changes that affect their ability to complete the mission.

# DoD Onboarding Guide

---

## Onboarding Worksheet – Continual Development / First Six Month -> Ongoing

Employee Name: \_\_\_\_\_

Task	Completed?
Recognize positive employee contributions	
Provide formal and informal feedback on performance	
Finalize initial Individual Development Plan	
Promote participation in webinars, training, conferences, “lunch and learn” activities, and other outreach/developmental activities, etc.	

### ***Additional Options for Establishing a More Robust Onboarding Program***

\*\* NOTE: Beyond the newcomer’s reporting date, the sponsor should remain available to answer questions and provide assistance.

Job Orientation – this is an on-going phase focused on enabling employees – new, seasoned, or transferred employees – to understand the job, their role on the team, and how their work contributes to the mission of the agency or organization. Since this phase is ever-evolving with the changes that impact the agency, managers and sponsors are reminded to remain vigilant in keeping the team apprised of changes that affect their ability to complete the mission.

# DoD Onboarding Guide

---

## SAMPLE SPONSOR PERSONAL LETTER

Dear Mr./Ms. Employee Name:

Congratulations on your new position with the Directorate, Branch of the [Component/Service Agency]! As you know from our previous conversation, I've been assigned as your sponsor to welcome you to the DoD family as well as to ensure your transition goes as smoothly as possible. I look forward to welcoming you to our great team.

Paragraph describing yourself - how long you have been stationed here, unit's mission, work center, and experiences

Location is currently one of the description of the area organizations within the [Component/Service Agency]. The surrounding community offers a host of activities for every age and interest group. There is something to suit every taste.

Although we discussed your individual needs previously, I've enclosed a Newcomer Needs Assessment Checklist so you can address any additional needs. Please return the checklist to me by Date. Upon receiving this checklist, I'll put together a welcome package and send it to you.

I'm here to ease your transition into the organization. Please feel free to contact me at any time to discuss your move, relocation, job acceptance - depending on whether this is a local hire or someone relocating from another area. Below is my home and work contact information:

Sponsor Name  
Organization Name  
Organization Address  
Home or Cell Phone (optional)  
Home E-Mail Address (optional)  
Duty Phone (DSN/Commercial)  
E-Mail Address (Work)

Again, welcome to Organization. I look forward to meeting you.

Sincerely,  
Sponsor Name  
Duty Title

# DoD Onboarding Guide

---

## NEWCOMER NEEDS ASSESSMENT CHECKLIST

Daytime Phone #

Evening Phone #

Cell Phone #

Will you be accompanied by family members? If so, do you have any special requirements or requests?

Do you need assistance with housing/temporary quarters?

Home Purchasing:\_\_\_\_\_ Rental House:\_\_\_\_\_ Rental Apartment\_\_\_\_\_

Do you need information on the following:

- Local School Information
- Child Care
- Healthcare
- Chapel/Places of Worship Information
- Library Information
- Post Office Information
- Realtor Information
- Pet/Kennel Information

Do you have any special medical/educational needs?

Do you need assistance with transportation arrangements upon arrival?

Do you need assistance arranging a general delivery post office box prior to your arrival?

What is your anticipated arrival date?

Is there any other specific information that you would like sent to you?

# DoD Onboarding Guide

---

## WELCOME PACKET – (PRE-ARRIVAL)

### Welcome Packet

The Welcome Packet may be sent together with the Sponsor Personal Letter. This package will contain information relating to your Component/Service Agency, the work location, and the surrounding community.

### Basic Information:

1. Work location and local area maps
2. Organization brochure
3. Organization's Mailing Address
4. Employee's New Telephone Number
5. Local Newspaper(s)
6. Schools Information
  - a. Local Colleges and Universities
  - b. Other schools - K-12 (if applicable)
7. Child care info (if applicable)
8. Chapel/Places of Worship information
9. Healthcare
  - a. Hospital information
  - b. Local area doctors
  - c. Insurance information
10. Driving Directions (to the installation, to the organization, from the airport, etc.)
11. Gate information - Hours, directions, and gate numbers (if applicable)
12. Library information
13. Post office information
14. Realtor information (if requested)
15. Temporary lodging and housing information - On-base and off-base
16. Entertainment
  - a. Brochures and information on local events
  - b. Listing of parks and other recreational activities
17. Restaurant Listing – local and on-base

### Other information:

Additional information identified from the initial conversation and needs assessment.

# DoD Onboarding Guide

---

## SUPPLY CHECKLIST

- Stapler
- Tape Dispenser
- Calendar
- Staple Remover
- Pens
- Pencils
- Highlighters
- Post-It Pads
- Notebooks
- Writing Pad
- Paperclips
- Binder Clips
- Staples
- Ruler
- Inbox
- Tape
- Scissors
- Trash can
- Chair
- Other: \_\_\_\_\_

# DoD Onboarding Guide

---

## QUICK REFERENCE NUMBERS (OPTIONAL)

Newcomer's Work Phone: \_\_\_\_\_

Manager's Work Phone: \_\_\_\_\_

Help Desk: \_\_\_\_\_

Emergency Closures/Information: \_\_\_\_\_

Inclement Weather: \_\_\_\_\_

Pass and ID: \_\_\_\_\_

Lodging (24 hours a day): \_\_\_\_\_

Airline/Flight Information: \_\_\_\_\_

Postal Service Center: \_\_\_\_\_

Chaplain: \_\_\_\_\_

Red Cross: \_\_\_\_\_

Travel Pay: \_\_\_\_\_

Family Support Center: \_\_\_\_\_

Defense Travel System (DTS): \_\_\_\_\_

Family Services: \_\_\_\_\_

Relocation Assistance: \_\_\_\_\_

HR Contact: \_\_\_\_\_

Traffic Management Office (TMO): \_\_\_\_\_

TMO 1-800 #: \_\_\_\_\_

Personal Property: \_\_\_\_\_

Vehicle Shipping: \_\_\_\_\_

Fitness Facility: \_\_\_\_\_

Training Focal Point: \_\_\_\_\_

Other: \_\_\_\_\_