



DoD ONBOARDING GUIDE



DEPARTMENT OF DEFENSE
DCPAS
Defense Civilian Personnel Advisory Service

PHASE 1

PHASE 2

PHASE 3

PHASE 4



OVERVIEW

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.

“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.”

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.

OBJECTIVES OF ONBOARDING

- **ATTRACT EMPLOYEES**
- **INCREASE EMPLOYEE ENGAGEMENT LEVEL**
- **IMPROVE EMPLOYEE PERFORMANCE**
- **INCREASE EMPLOYEE RETENTION**
- **INCREASE LEVEL OF RELEVANT SKILLS & COMPETENCIES**
- **SUPPORT AN INTEGRATED MILITARY/CIVILIAN CULTURE**



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.

ONBOARDING VS. ORIENTATION

ONBOARDING

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

ORIENTATION

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

A process not an event





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.
- Makes your employee feel welcome, understand basic organizational procedures and become familiar with the bigger picture.
- Helps employee 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.
- Integrates employees into the team quicker, gives a sense of accomplishment and validates their decision to come to work for you and your organization.

TIP

Managers should monitor the performance of the new employee during their probationary period to determine if he is or she is a fit for the organization and similarly, if the organization is a fit for him or her.

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? In the 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?



YOUR ROLE (CONT.)

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:
 - o Organizational charts
 - o Job Descriptions and performance plans
 - o Work area maps
 - o Department mission, vision and goals
 - o Area newsletters and websites
 - o Other site specific material
- Meets regularly with the employee to answer questions, recommend training activities, review policies and procedures and discuss any employee concerns.

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 from the time of the offer letter through the new employee's first month.
- Provides the assistance the employee needs to get settled into the organization, his or her workplace and information about the local area (e.g., temporary lodging, local transportation, etc.).
- Helps with day-to-day questions.
- Maintains contact with the new employee and serves as 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 his or her opportunity for greater productivity and the likelihood he or she will stay with the agency.



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.

FOR QUICK REFERENCE ON THIS TOPIC SEE

**DOD ONBOARDING
KEY ACTIVITIES**



Included in this collection are supplemental Onboarding Worksheets for:

1. Before First Day ▶ Pre-Board
2. First Work Day ▶ Welcome
3. First Week ▶ Building Familiarity
4. First 90 Days ▶ Acculturation
5. First Six Months + ▶ Continual Development

Also included in this collection are:

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

**PRE-BOARD**

Employee Name _____

KEY TASKS

- Identify a sponsor to 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.
- 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.)



WELCOME

Employee Name _____

KEY TASKS

- 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, 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.



WELCOME (CONT.)

ADDITIONAL OPTIONS FOR ESTABLISHING A MORE ROBUST ONBOARDING PROGRAM

In-Processing — Acquire organizational in-process checklist, make appointments for the newcomer to meet with each POC (Point of Contact) on the checklist and escort the newcomer to each POC. Your Human Resources (HR) Professional will direct activities within this phase.

- Meet and accompany the newcomer to the Human Resources Office (HRO).
- Complete necessary paperwork and administrative requirements.
- Give the “Oath of Office.”
- Enroll employee in benefits programs.
- Accompany newcomer to obtain government and vehicle IDs.
- Accompany newcomer to duty section.
- Introduce newcomer to manager and fellow coworkers.

Site Orientation — This may include a 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
- Personal Storage
- Cafeteria, Break Facilities, Refrigerator
- Restroom Locations and Restroom Key/Codes, if applicable
- Map of the surrounding area including Public Transit, Restaurants, Pharmacy, etc.

Safety Orientation — This should be provided to new hires as soon as possible, explain safety policies specific to your organization and discuss:

- Hazard Reporting
- Accident Reporting
- Emergency Procedures
- First Aid
- Employee Rights and Responsibilities under the Safety Program
- Safety, Health and Fire Protection Inspections

Security Orientation — This will ensure that all new hires understand the command security structure and security procedures specific to your organization. Discuss:

- 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.



BUILDING FAMILIARITY

Employee Name _____

KEY TASKS

- Provide position description, job scope and 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 his or her workstation. Contact your Component or Servicing Agency to determine what web-based content and resources are available.



ACCULTURATION

Employee Name _____

KEY TASKS

- 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

- Job Orientation:** This is an ongoing 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.

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



CONTINUAL DEVELOPMENT

Employee Name _____

KEY TASKS

- 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.



SAMPLE SPONSOR PERSONAL LETTER

OPTIONAL: CONTACT YOUR SERVICING HR PROFESSIONAL FOR FURTHER GUIDANCE.

Dear [Mr./Ms. Employee Name]:

Congratulations on your new position with the [Directorate, Branch] of the [Component/Servicing 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/Servicing 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]



NEWCOMER NEEDS ASSESSMENT CHECKLIST

OPTIONAL: CONTACT YOUR SERVICING HR PROFESSIONAL FOR FURTHER GUIDANCE.

Name: _____

Daytime Phone: _____

Evening Phone: _____

Cell Phone: _____

Will you be accompanied by family members? *Circle.* Yes / No

If so, do you have any special requirements or requests?

Do you need assistance with housing/temporary quarters? *Check all that apply.*

- Home Purchasing
- Rental House
- Rental Apartment

Do you need local information? *Check all that apply.*

- 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?



WELCOME PACKET (PRE-ARRIVAL)

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.



SUPPLY CHECKLIST

- Stapler
- Staples
- Staple Remover
- Tape
- Tape Dispenser
- Pens
- Pencils
- Highlighters
- Post-It Pads
- Notebooks
- Calendar
- Writing Pad
- Paper Clips
- Binder Clips
- Ruler
- Inbox
- Scissors
- Trash Can
- Chair
- Other: _____



QUICK REFERENCE NUMBERS

- 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: _____

