



2023 tHRive HR Fundamentals Cohort | Workshop #5

Onboarding Practices

Thursday, September 14th

Prepared by:
Christie Cawley | President | tHRive

tHRive Team



Christie Cawley |
LinkedIn

Christie Cawley is a Senior Partner, Executive Consultant, Certified Coach & Master Trainer at Center for Victory, a global talent management consulting firm and is also the President of CCK Consulting LLC/tHRive-People Practices for Nonprofits (www.thriveHR.work). Additionally, Christie has a BA, Applied Psychology, is an active member of the Society of Human Resource Management (SHRM), International Coach Federation (ICF), a Certified Master Trainer with Predictive Index Worldwide, Inc. and a member of Vistage Trusted Advisors.

With more than 25 years of professional experience, Christie specializes in leadership development, talent management and business performance using science and the Predictive Index suite of tools to help clients overcome their most challenging human capital and hiring dilemmas. Christie has extensive experience a human resources leader, non-profit executive, executive coach and business consultant, and supports organizations through significant change implementation and coaches for successful execution and sustainability.

Non-Profit Experience: ACTION Housing Inc., AIR, Allegheny Conference, Allegheny Health Choices Inc, Carriage House Inc., Center for Theater Arts, Center for Women, Children's Hospital of Pittsburgh, Construction Junction Inc., CISPAC-Communities In Schools Pittsburgh Allegheny County, DePaul School for Hearing & Speech, Easterseals of Michigan, Family House Inc., Family Means (Wisconsin), Global Links, Hillman Family Foundations, Humane Animal Rescue, Juniata College, Methodist Church Union, NAMI Keystone, National Council of Jewish Women, Pittsburgh (NCJW), P3R, Peoples Oakland, PRC- Pennsylvania Resources Council, Regional Housing Legal Services, The Forbes Funds, Trying Together (formerly PAEYC), University of Pittsburgh (Department of Athletics & Student Life), YMCA Central Virginia, YMCA Greater Dayton Area, and YMCA Greater Pittsburgh.



Judy Eakin |
LinkedIn

Judy Eakin has been working in the nonprofit sector for over 35 years. She was a Director at George Junior Republic and CEO of Pittsburgh Big Brothers/Big Sisters. For the last 24 years she was the CEO of HEARTH increasing its size and number of families served by over 100%. Judy has a Bachelors and Masters degree in Social Work and is a certified Marital and Family Therapist. She has also completed multiple training programs offered by the University of Pittsburgh, Harvard, and Duquesne University with focus on strategic planning, fundraising, program evaluation, and employee development.

In addition to working with boards in her employment, Judy has also served on the Board of Directors and committees for numerous nonprofits. She specializes in Board Development, Program Development, and Strategic Planning. During her time as the "de facto Human Resource specialist", Judy created, modified and implemented policies, job descriptions, and performance evaluations, including those for volunteers and clients. She successfully managed her agency through COVID -19 with help from Christie and the tHRive program. Judy's strengths include identifying and responding to change, relationship development, revenue diversification, and coaching for growth and success.



Joel Skerlong |
LinkedIn

Joel Skerlong currently serves as a Project Administrator for tHRive and CCK Consulting LLC and also operates a remote consulting practice for Talent Management Agencies within New York City. Joel specializes in analyzing the components of business strategy, implementing value additive procedures within people operations practices, and developing/driving performance management initiatives. Joel recently obtained his certification as a PI Practitioner for the Predictive Index Worldwide, Inc.

Workshop #5

Onboarding Practices

Make a Great First Impression!



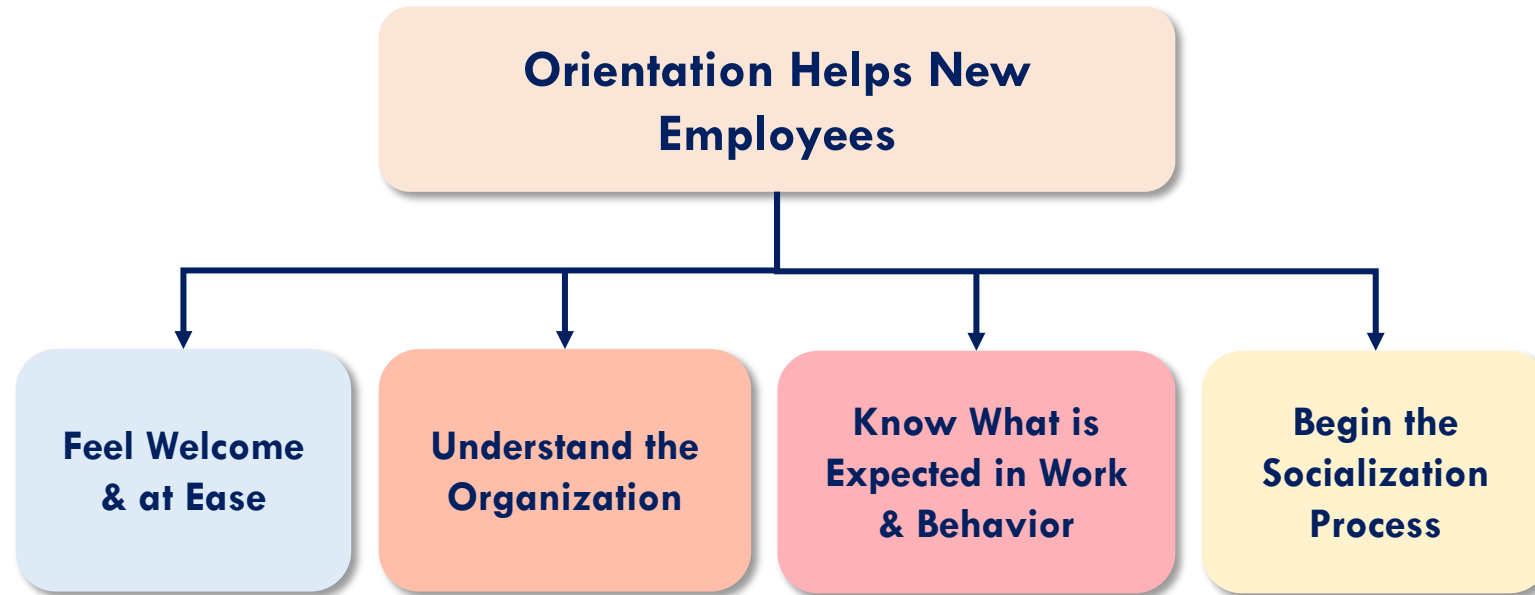
Workshop #5

Onboarding Practices | Agenda

- I. New Hire Planning (At Point of Offer)**
 - A. Administrative**
 - B. Operations**
 - C. Communication**
- II. Employee Employment, Benefits & I-9 Folders**
- III. Establishing Checkpoints**
- IV. Onboarding (As of Day 1)**
 - A. Orientation to Job**
 - B. Introduction to Team & Culture**
 - C. Instill Sense of Belonging**
- V. Onboarding Open Discussion**

Workshop #5 Onboarding Practices | Agenda Cont.

Purpose of the Orientation



WorkTango | How to Create a Sense of Belonging

HBR | 4 Reasons Talented Employees Don't Reach Their Potential

Breakout Session

New Employee Hiring Planning Process



New Employee Hiring Planning Process

1. Offer Letter Signed & Returned
2. Start Date Confirmed
3. Resignation Provided
4. Background Checks/Screening
5. Send Welcome Packet (A)
6. Prepare/Send Paperwork/Pre-work (B)
7. 1st Day Prep & Email (C)

Tip: Do everything you can to reduce paperwork on an employee's 1st day. Send PDFs to complete in advance of Day 1.

Tip: Stay connected with candidate each week until start date

A. Create Welcome Packet:

- Organization Brochure
- Organizational Chart
- Mission Statement
- Annual Calendar
- Employee Handbook
- Benefits Info

B. New Hire Paperwork:

- Compliance Forms
- Payroll/Timekeeping Forms
- Organization Policy/Procedure Forms
- Benefits Forms

C. Advise Employee to Bring the Following Info:

- Identification – See I-9 Form
- Social Security # for Self and Dependents
- Tax Filing Preferences
- Emergency Contact Info – Medication/Allergies (Sharing Permissions)
- Auto Info (if applicable for parking) & Auto Insurance
- Voided Check for Direct Deposit

New Employee Hiring Planning Process

Prepare Paperwork for Employee File

[Employment Eligibility Verification](#)

[Background Check Authorization Form](#)

Taxes:

[W-4](#)

Services to Consider:

[ProVerify](#) or [Justifacts](#)

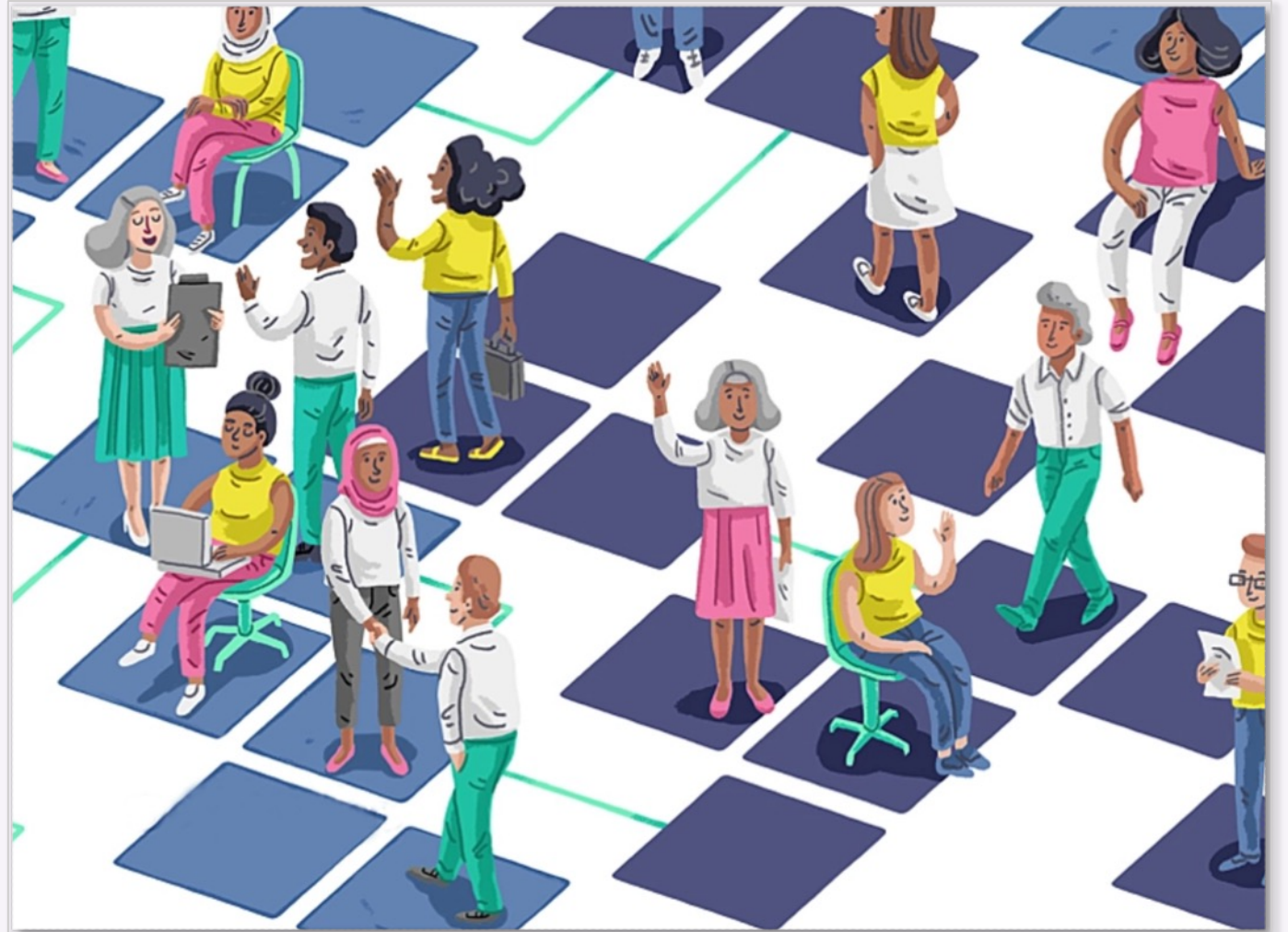
Applications or Other Work Contracts:

[State Compliant Job Applications](#)

[PA Employment Contract Templates](#)



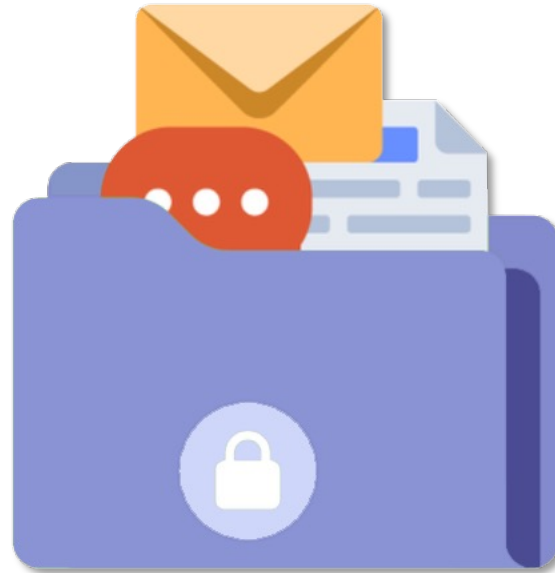
Employee Employment, Benefits, & I-9 Folders



Employee Employment, Benefits, & I-9 Folders



**Employee
Employment
Folder**



**Employee
Benefits
Folder**



**Employee
I-9
Folder**

Employee Employment Folder



Employee Employment Folder

Job Application Form

Can protect you in case of a charge of hiring discrimination and provide basic employee background and contact data

Employee Handbook Acknowledgement Form

Verifies receipt of the handbook and policies

Conflict of Interest Acknowledgement Form

W-4

Signed tax form

Direct Deposit Form

Gathers employees' bank account information (optional)

Signed Offer Letter

Documents that the employee agrees to the job role, title, start date, pay, and benefits

Specific Signed Policy Documents

Used to confirm that requirements have been met or training completed, such as nondiscrimination or drug testing policies

Emergency Contact Information Used in case of an emergency, such as if an employee is injured, becomes ill on the job, or fails to show up for work and can't be reached

Nondisclosure Agreement (NDA) Also known as a confidentiality agreement; this protects your business by preventing workers from sharing confidential, proprietary information.

Retirement Enrollment and Beneficiary Forms: Used only if you provide retirement benefits like a 401(k) or insurance benefits like life insurance (optional)

Employee Benefits & I-9 Folders



Employee Benefits Folder

(Separate from the Employee Employment Folder)

Benefits Enrollment Forms:

Allows an employee to sign up for health care or insurance benefits and gathers information on employees and their dependents (optional)

Retirement Enrollment and Beneficiary Forms: Used only if you provide retirement benefits like a 401(k) or insurance benefits like life insurance (optional)

Federal Record Retention Requirements

HIPAA

Workers' Compensation

Leave of absence verification of return to work, reasonable accommodation (Medical Info)

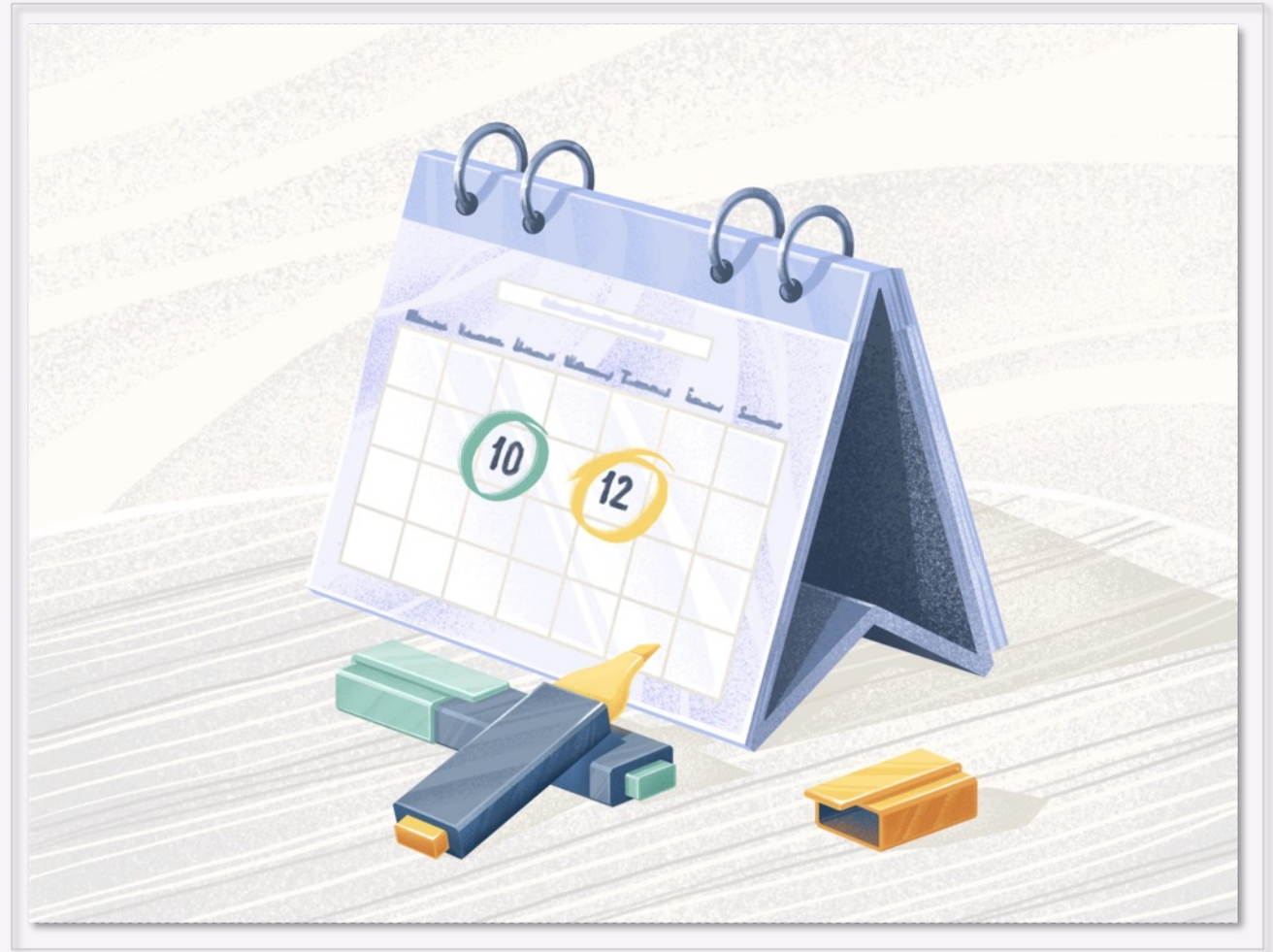


I-9 Folder

(Separate from the Employee Employment & Employee Benefits Folder)

I-9 Verification Forms

Establishing Checkpoints



Establishing Checkpoints

45-Day

- Individual Goal Setting
- Expectations
- Work Preferences
- Areas of Org. Where Confidence is Established

90-Day

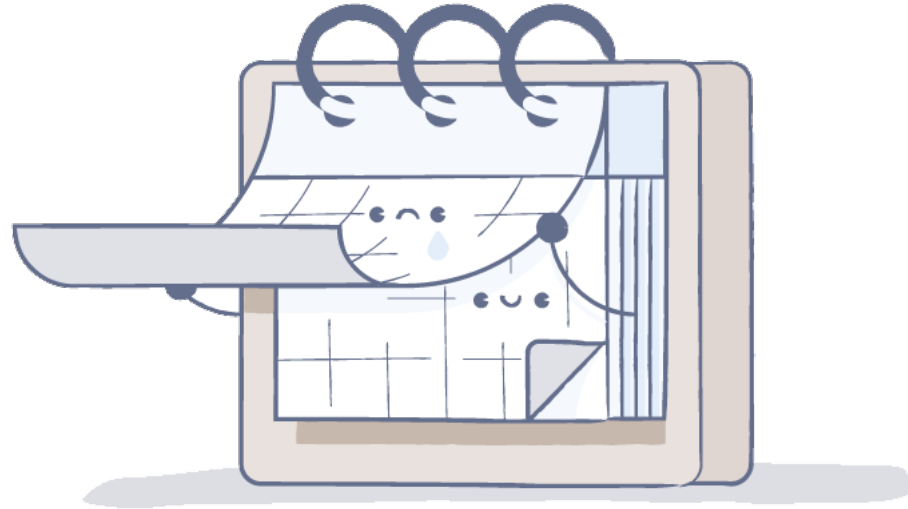
- Introduce New Hire to Events/Fundraisers/etc.
- Specialized Training

6-Month

- Observations
- Contributions
- Values
- Teamwork
- Communication Style

1 Year

- Next Steps
- Opportunities
- Obstacles
- Navigation
- Resources



Onboarding Checklist



Onboarding Checklist

Items to Complete Prior to Day 1

Send an Offer Letter

**Complete Employment
Forms**

**Obtain Personal/Financial
Information**

**Create & Send
Welcome E-mail**

**Prepare & Send Tentative First
Day & First Week Agenda**

**Create & Send New Hire
Announcement Email**

**Prepare New
Hire's Tech**

**Prepare & Send
Onboarding Kit**

**Assign a Buddy for the
Initial Month**



Discussion

Onboarding Open Discussion

What did we learn from PI that may guide the way we structure the introduction of our organization?

What is the primary goal of the onboarding process?



How do you clarify expectations? (What to expect from them & you)

Are members from your interview team part of the onboarding process?

How do you establish goal setting?

How has the onboarding process changed from the in-person to virtual transformation?



Q&A / Next Steps

