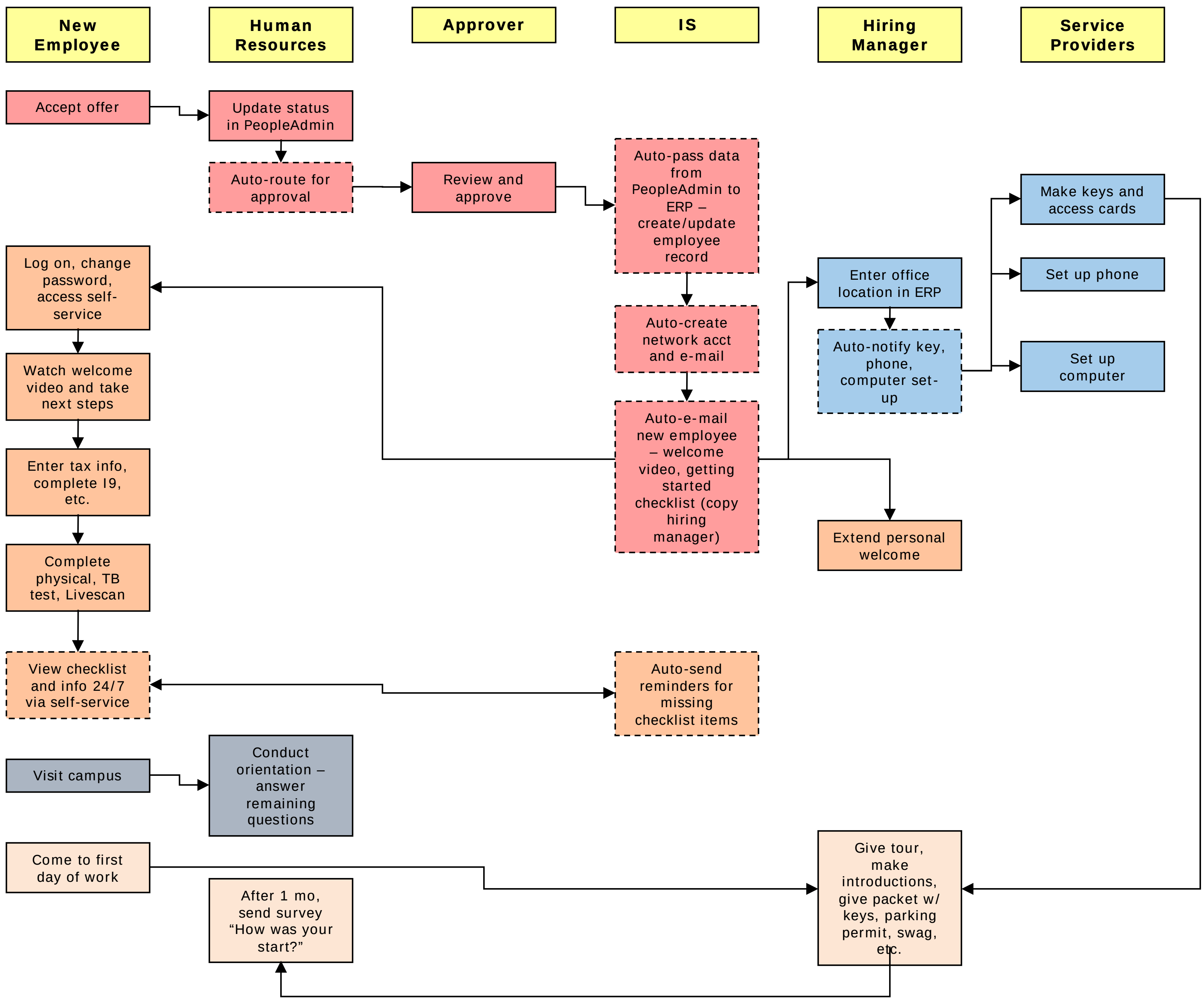
Onboarding Process

Top Opportunities

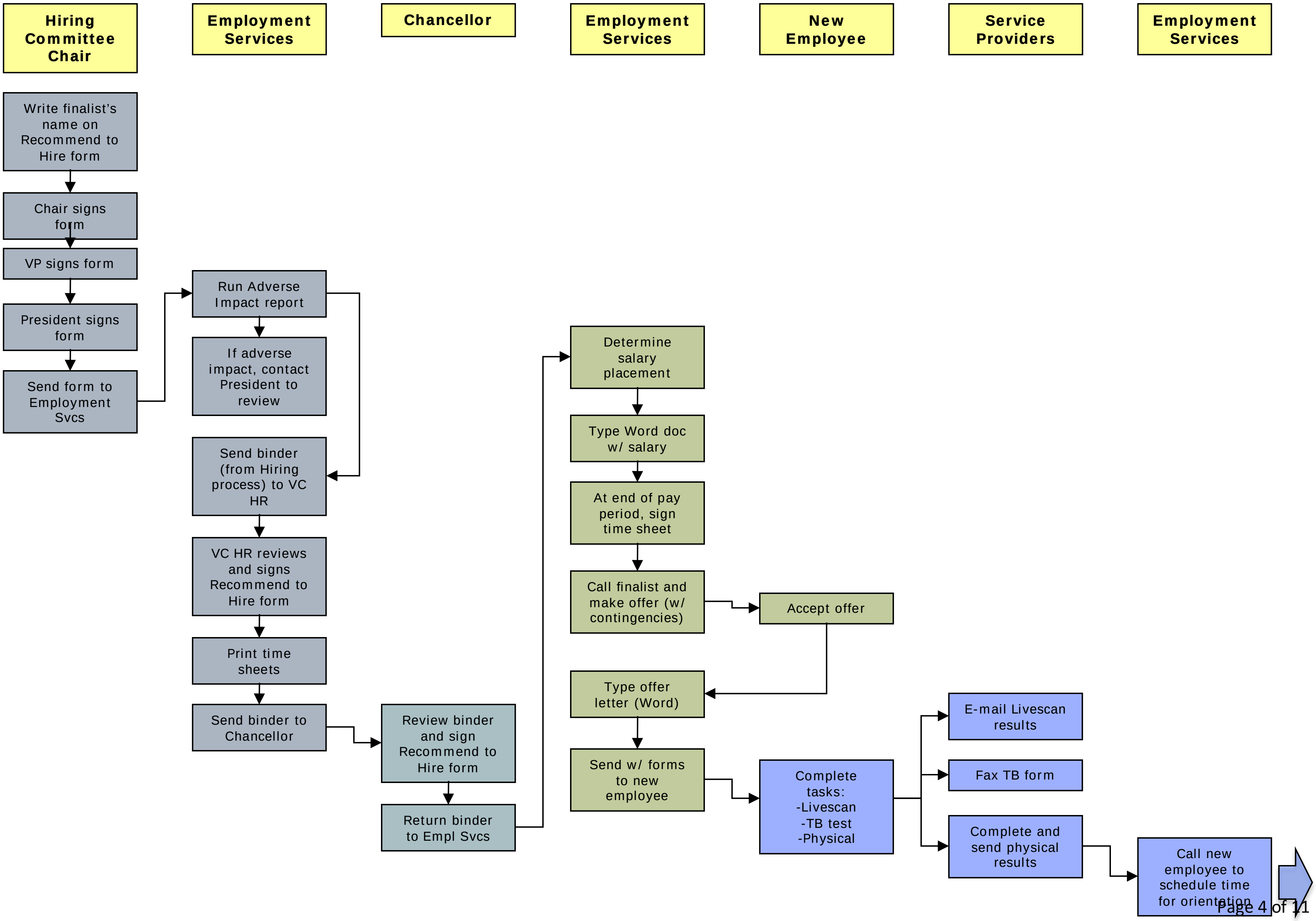
Over the course of the workshop, participants identified many opportunities for process improvement. At the end of the session, they participated in an anonymous weighted voting exercise. Each participant was given ten "votes." An individual could place all her votes on a single opportunity or spread her votes among several. This allows us to identify which opportunities the group deems most important for the Colleges and the District. It also lets us see if there is emerging consensus around any items. The results are listed below:

# of Votes	Opportunities
61	Implement a single, integrated system
20	Develop clear guidelines for process – for consumers and suppliers • User friendly • Checklist • Well organized
19	Ensure accuracy • Enter data once • Eliminate need for shadow systems
10	Ensure reliable process and technology
10	Involve front line staff in project
7	Provide for proxies
6	Eliminate paper
5	Fully utilize technology
5	Compile a packet with keys, parking permits, etc. to give to new employee on first day
5	Provide training and support 24/7
2	Send notification to stakeholders when process complete

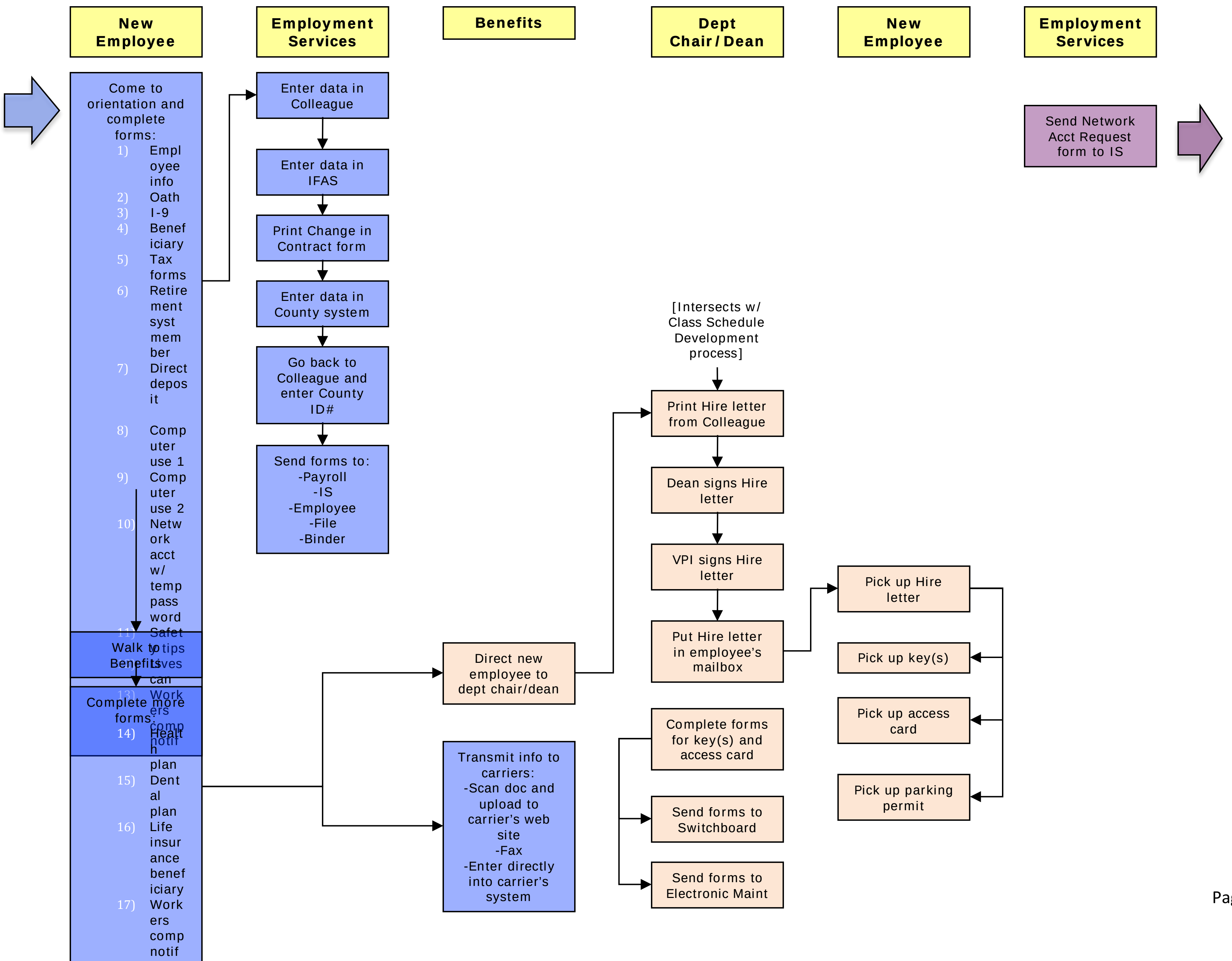
Ideal Onboarding Process



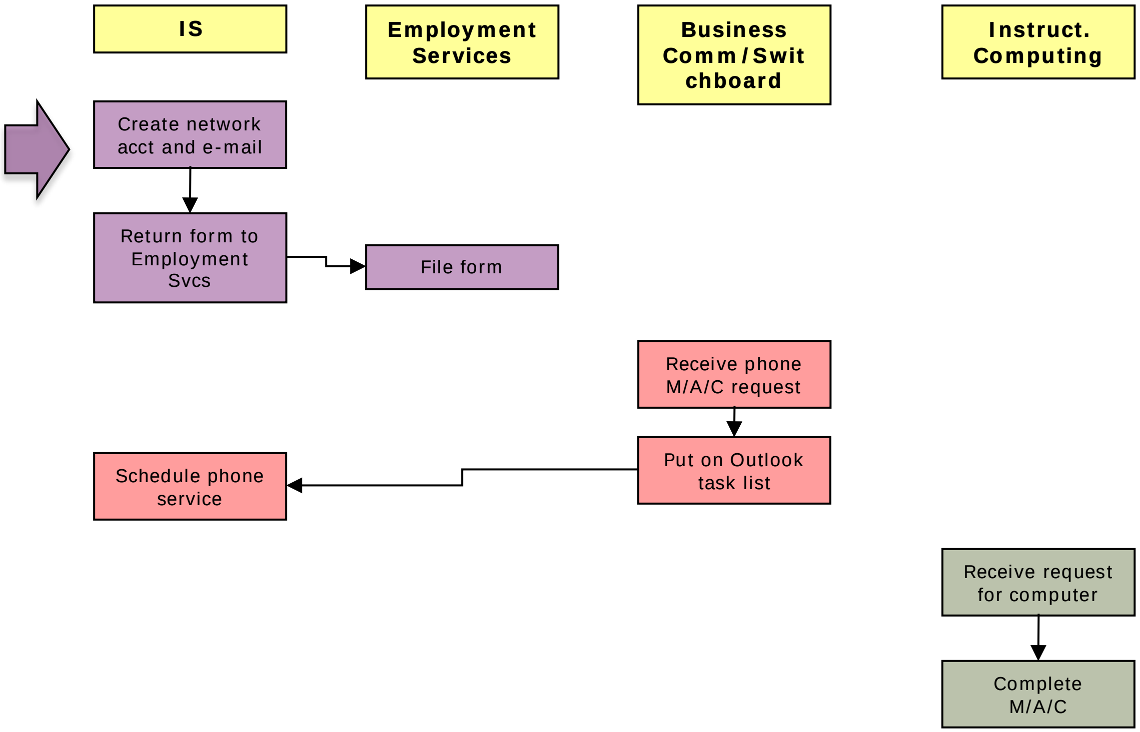
Current Onboarding Process – Full-time Faculty – 1



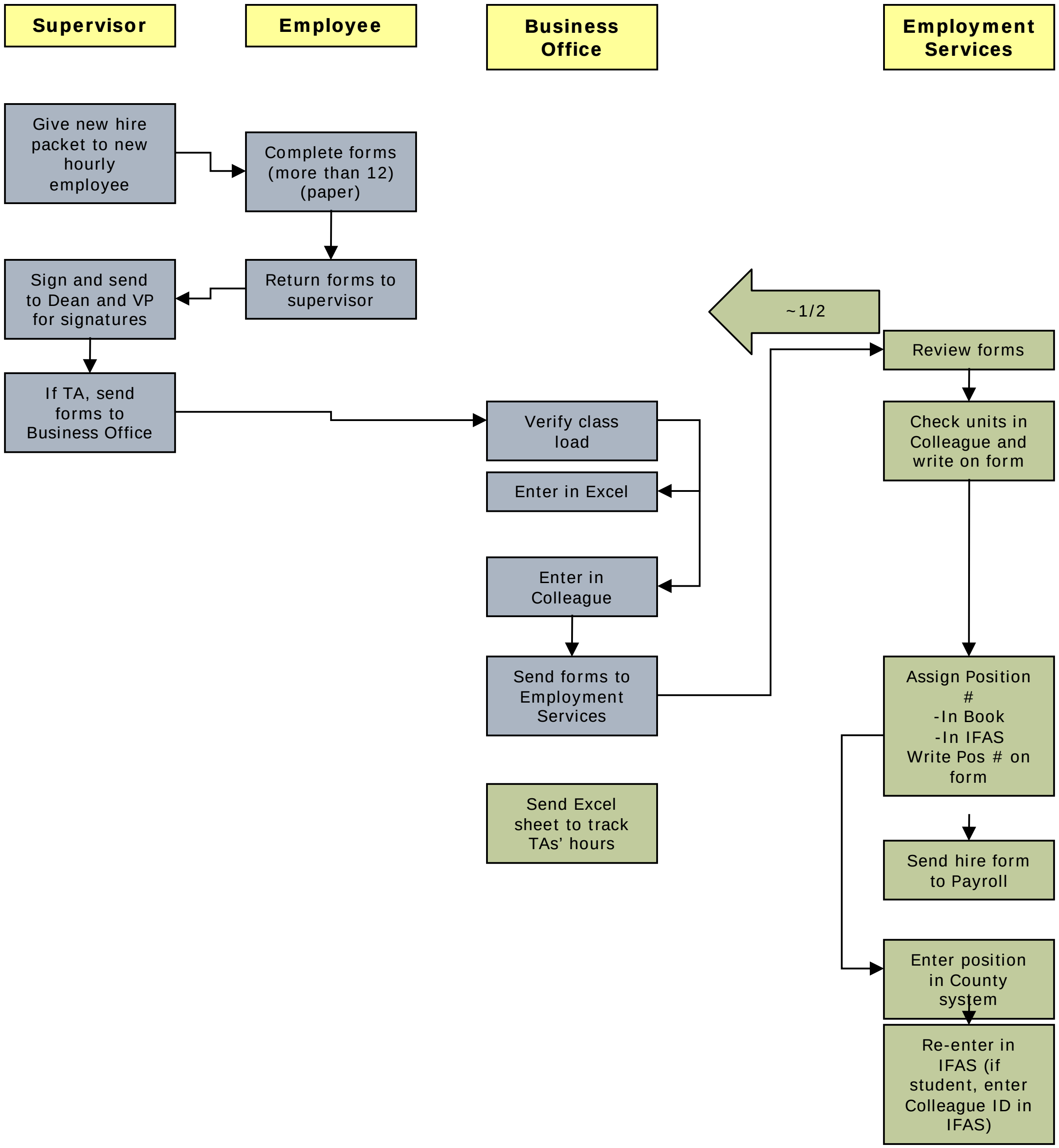
Current Onboarding Process – Full-time Faculty – 2



Current Onboarding Process – Full-time Faculty – 3



Current Onboarding Process – Hourly



APPENDIX C

Opportunities for Improvement

Onboarding Process

In brainstorming fashion, participants identified the following opportunities. (These are not listed in ranked order, nor do they necessarily represent consensus.)

- Obtain signatures faster
- Provide proxy or backup approval functionality when primary approver is out
- Decouple notification ("FYI") and approval
- Provide computer use agreement via web
- Utilize technology for routine transactions – e.g. data collection, information sharing – in order to free up staff to use their expertise to conduct complex activities – e.g. explanation of medical insurance benefits, welcome to the college
- Develop a unified process
- Revisit signatures – e.g. how many are needed – if any – on the hire letter
- Clarify various items needed by new employees – e.g. key, key card, business card, parking permit
- Consider compiling all necessary items and provide to employees in a "packet" on their first day
- Set up office earlier in the process – e.g. computer, phone
- Communicate "We're glad you're here and we're ready for you"
- Explore allowing a longer gap – e.g. two semesters – before having to re-start the entire hiring/onboarding process
- Use auto-notifications – e.g. when student employees drop below X units, when short-term employee exceeds Y hours, notify supervisor and department admin when all items are complete
- Utilize employee types with different parameters when gathering information online
- Cultivate a pool of hourly employees – don't "re-hire" every time
- By using web-based forms, can require fields up front – i.e. cannot submit incomplete information
- Utilize checklists
- Use PeopleAdmin for all applications – including adjunct faculty
- Align and integrate Auxiliary Services – migrate to PeopleAdmin and new ERP
- Start gathering information during the hiring process
- Clarify process and explicitly define hand-offs
- Develop clear guidelines – e.g. for department chairs when bringing on a new faculty member
- Develop clear roles and responsibilities
- Organize the process
- Enter data once
- Use new ERP as the "system of record" – single source of data
- Eliminate the need for shadow systems – e.g. Excel, Access
- Fully utilize technology – e.g. new ERP, workflow, imaging, self-service
- Develop confidence in the process, technology, and people
- Eliminate paper
- Ensure reliability
- Provide everything needed in one place

- Ensure process and technology are user friendly/intuitive to those who use it most
- Provide training and ongoing support
- Develop clear instructions/tutorials/videos
- Reduce layer
- Ensure fewer clicks
- Accurate data – “do something right once”
- Discontinue entering the same data multiple times
- Ensure consistency
- Provide 24/7 support – e.g. chat, FAQs
- Make it clear – where to go for X problem
- Take time and location out of process – 24/7 access from anywhere in the world
- For each employee type, revisit forms needed – reduce the number
- Integrate onboarding with other intersecting processes – e.g. key card distribution and access
- Create forum – cross-functional team – for thoughtful discussion
- Increase size of e-mail box
- Deploy portal
- Utilize “targeted messaging” in a portal rather than e-mail
- Retain data in the system – audit trail
- Realistic about time and effort needed for project
- Involve front-line staff in the project
- Make some changes now – “low hanging fruit” – build momentum
- Provide a clear feedback loop
- Include affected stakeholders in decisions regarding process and technology
- Don’t get impersonal – be high-tech AND high-touch
- Send notice “got it”

APPENDIX D

Obstacles

Onboarding Process

In the same manner, participants identified the following obstacles:

- Some process steps are out of sequence – e.g. ask new hire to accept offer prior to communicating salary
- Not clear who is authorized to make offer
- Paper drags the process down
- Some process steps represent approving again (and again)
- Confusion around what's in PeopleAdmin and what's in IFAS
- Some required items are completed after the employee begins
- Okay to start without TB test and Livescan
- Process disconnected from completion of paperwork
- "Orientation" is about completing forms – impersonal, un-strategic, not welcoming
- Paper, paper, paper
- Asking new employees the same basic information on more than 17 forms
- Writing and distributing password on paper
- Technology is only used at the end of the process – paper is the driver
- Many shadow systems in HR and in departments – Excel, Access
- SSNs being stored multiple places – represents security risk
- At least four employee files – Payroll, Benefits, Employment Services, Department
- Different processes at District and Colleges
- Catch 22 – need to have the hire letter in order to get the key, but need the key to get to the mailroom to get the hire letter
- "Squishy" office assignment process – not clear
- Many employees start work without computer or phone
- New employees must run around campus to get started
- Multiple databases used to track keys
- Takes two days to two weeks to get network account
- Employee not notified when network account has been set up
- No clear process for phones – informal, "once we find out"
- No clear process for computers – M/A/C
- Process to access computer resources is a "free for all"
- Using shadow system to track hours for hourly employees
- Huge packet of documents for hourly employees
- If out for a semester, must start the whole process over
- Not a clear process for termination – when hourly or adjunct employees skip one or more semesters
- Pain points
    - Volume (many hourly employees)
    - Churn (more than half return in a future semester)

    - Peaks (during some periods, process slows significantly
- Supervisors are not employment experts – but we are asking them to be
- Adjunct load report may be generated too late
- Hourly employees who work in more than one department may exceed their max hours – then receive overtime pay
- Last minute hires – e.g. an adjunct who starts teaching before completing the process
- Classified onboarding not as well-defined as for full time faculty – no mentor, varies by supervisor
- Painful process if there's a change in work schedule – on contract, off contract
- Change in administrators – start and stop improvements