

Onboarding Checklist for Provost, Senior Leader, VP, AVP, Etc.

Pre-Onboarding	Status	Lead/Primary
Once applicant accepts the offer for employment, they will receive an email prompting them to complete the hire paperwork. A background check will be initiated		HR
Call (or email) the new employee: Share with them that you are looking forward to them joining the team, reconfirm the start date, start time and send welcome email. Be sure to account for the fact that your new hire may be attending New Employee Orientation on their first day.		Executive Assistant (EA)
Request Laptop/Hardware: Once HR has processed the new hire, contact IT Services ASAP to order the laptop (<i>Senior leaders will require access to an account and hardware prior to the start date, which if not coordinated will result in multiple accounts</i>). Once the laptop has been issued, schedule (in partnership with the senior leader) an IT "set up" appointment for IT to work with the employee to 'sync' their laptop to appropriate systems, ensure the Multifactor Authentication is active, connect to printers, etc. <i>Refer to Row 46 below in this Spreadsheet.</i>		EA
Request Systems Access: Internal-use secure portals, platforms, drives, etc. Most (if not all) such requests will be submitted via IT Service Tickets.		EA
Ensure the employee's work station (cubicle, office) has the necessary (and preferred) equipment set up. If not, submit request(s) for equipment (e.g. Two monitors, keyboard, mouse, phone desk set, standing desk/converter, trash can, recycle bin). Also consider 'aesthetics' of work station (desk lamp, small heater, fan, etc.)		EA
Building Access: Ensure the new employee has keys and/or badge swipe access activated for entry to their building prior to their start date.		EA
Employee ID: Assist the new employee with acquiring their university ID/badge; advise them to carry their ID/badge access with them at all times on campus.		EA
Local Public Transportation Pass (optional): If your institution provides employees with a free or discounted pass for local public transportation (buses, light rail), assist the new employee with acquiring this pass.		EA in partnership with the Employee
Other Miscellaneous Items: Also order the following items for the new employee (as appropriate): Business cards, Name tag, Name Plate for Office, Key to Office, Phone Extension Request.		EA or Office Manager
Prior to the new employee starting their role, create a First Week Agenda (and/or monthly agenda) for them. Work with the President or Chief of Staff to craft this.		EA
Schedule introductory meetings with constituents, direct reports, teams, etc. Typically, 45- or 60-minutes in duration for each. Schedule key meetings for the first 4-5 weeks; consult with new hire to make any tweaks to that schedule. Consider designating each of the four weeks thematically. For example, <i>Week 1:</i> New Employee Orientation, Trainings, Onboarding + one-on-one with President + one-on-ones with Direct Reports; <i>Week 2:</i> one-on-ones with Direct Reports continued, plus one-on-ones with each Member of Presidents Senior Executive Team/Cabinet; <i>Week 3:</i> One-on-one with additional colleagues (Chair of the Board of Trustees; Faculty Trustee; President of Faculty Senate; President of Council of Chairs and Directors, etc.); <i>Week 4:</i> one-on-ones or team meetings based on topic - Budget; Strategic Plan; Curriculum; etc. <i>Week 5:</i> One-on-ones with key external contacts as appropriate (rep from state's Department of Higher Education; regional education body, like WICHE; other partnerships like AACSCU, EAB, etc.)		EA in partnership with the Employee
Add the new employee to relevant Email Distribution Lists (groups). Also update department/office Org Chart to include their information.		EA or Office Manager
Add the new employee's details to relevant department/office website ('Staff' page).		Web Author
Prepare a Welcome Binder containing pertinent university information and department information: Org Charts; Direct Reports' Job Descriptions; Acronym List; Leadership Team Members' bios; Email Contact List; Emergency Evacuation/Procedures Information; Holiday Schedule; Campus Maps; List of Key Events and Dates for the Academic Year and/or Calendar Year; pertinent archived Meeting Recordings and/or Minutes (like for prior Board of Trustees Meetings; President "Welcome Back" or "Kick Off" events; President's Cabinet Meetings, etc.)		EA
Prepare a welcome basket/gift: ie coffee/café gift card, university swag, pens, t-shirt, etc. (check with other departments/office for swag if you don't have any)		EA
Provide the new employee with a list (via email) of pertinent, helpful website links to 'Bookmark'/'Favorite' (e.g. secure portal login like for Workday; SharePoint; Board of Trustees page; Strategic Plan website; etc.)		EA
Add to new employee's calendar (either directly, if Delegate, or by forwarding meeting invites) important meetings for the days, weeks, and months ahead pertinent to their role. <i>Refer to Row 40 below in this Spreadsheet.</i> (e.g. President's Cabinet Meetings; Commencement; Board of Trustees meetings; Legislative Update meetings; Senior Staff meetings; etc.) Also ensure that the employee's calendar is updated to include all University holidays (closures).		EA
<i>If useful,</i> provide the new employee with a map of the Office Suite (layout) to help orient them as to who-is-located-where within the suite (individuals per cubicle & per offices, as well as location of Conference Room[s], supply room, etc.)		EA or Office Manager
New Hire Welcome		
Introduce to the new employee to the team, <i>arrange for EA to have lunch with new Provost</i>		EA
Physical Space Orientation: arrange for a department, building and campus tour		EA
Explain to the new employee what to expect the first week, 30-days, 60-day, 90-days, 6 months (the 'flow' of each semester). Review position description and responsibilities goals, deadlines, etc		The new employee's supervisor in partnership with the EA.
Review and complete any outstanding hiring documents		HR
Discuss EA's position, responsibilities, expectations, goals		EA
Provide campus map and parking options or additional transportation options		EA or Office Manager
Order stationary, if appropriate (envelopes, letterhead/ e-letterhead, notecards)		EA or Office Manager
Introduction to university, people and role		
Provide employee with a list of meetings and colleagues from other areas of the university or campus with whom the new employee will be connecting during their first few weeks		EA
Establish an understanding of the different roles in the team, department, etc		EA in partnership with the Employee
Forward institute/division/department/university-wide meetings or groups that you want the employee to be involved in or that they are interested in. Encourage your new hire to connect with campus communities		EA and/or Chief of Staff
Schedule "meet and greets" in addition to one-on-ones		EA
Ensure job scope and related expectations are clear and specific		new employee's supervisor
Go over departmental expectations and courtesies		EA
Review policies and procedures and recommend which to bookmark/be able to access quickly		EA
Ensure your new hire is connected to your college, school, institute, division or department communications		EA
Develop a unit-specific checklist that might include information on signature authority, purchasing processes, safety items, etc		EA or Office Manager
Consider, with a lens toward longer-term priorities, developing an internal mentor program		the new employee in partnership with their supervisor
Ensure the new employee knows how to login to their device(s) using Multifactor Authentication and that they know how to access secure internal platforms, Microsoft Teams, Outlook, SharePoint, etc		EA
Education and Training		
Recommend professional development opportunities that align with goals		new employee's supervisor
Complete university-required trainings		the new employee
Describe nuances of campus operations, if applicable.		EA
Introduce the new hire to Internal-use secure portals, platforms, drives, etc. and schedule training(s) accordingly		EA
Orient the new employee to the Mission, Vision, Strategic Plan, Values and Culture - of the University as well as for their particular area/division/department		EA as well as the new employee's supervisor
Encourage the new employee to explore the university website, to further familiarize themselves with the president, senior leaders, committees and groups, departments, mission, vision, strategic plan		EA