

Making the Best Impression- Impactful On-Boarding

Idaho Housing and Finance Association

Management Innovation: Human Resources

HFA Staff Contact

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Welcome Home: New Employee Experience

OUR CHALLENGE

Idaho Housing and Finance Association is a highly technical and sophisticated organization that serves diverse audiences in every corner of our state and several others. In addition to staff scattered among six offices throughout the state, we are a master servicer of single-family mortgages for sister HFAs in other states. Our organization has received the “Top 10 Best Places to Work in Idaho” award multiple years, including 2020. Our growth has been fast and furious, and we didn’t want to lose sight of how to make joining IHFA the best possible experience for every candidate and every new hire. An applicant’s initial experience with recruitment sets the table for being a part of the IHFA team, so it’s important to make a favorable impression on every applicant. We need to be “state of the art” in recruiting and onboarding to continue our success.

In 2019, we brought 91 new employees to our organization in addition to turnover and additional staffing needs. We have a fairly close-knit employee culture and as we have grown we’ve focused on making sure that the experience provided to new hires is very personal and welcoming without being overwhelming. We also wanted to “wow” our final candidates by having state-of-the-art technology such as a paperless application process with fast follow-through. Applications are online, with an immediate response that, “We received your application and you will be notified of your status very soon.” That turn-around time is within the same day as the application is received.

OUR INNOVATIVE SOLUTION: “WELCOME HOME!”

We wanted to brand our recruitment and onboarding process to have a warm, family-oriented feeling that would tie the applicant into our company mission. With those key values identified, we came up with the theme of “Welcome Home!”

We have centered our recruitment efforts to carry over to an entirely new and innovative onboarding experience with the same theme versus the typical one-day orientation. Once an employee has accepted an electronic offer of employment, we want to make sure they feel like part of the IHFA family. This led us to a drastic change to our onboarding process to make it more employee-centric and welcoming.

With so many new employees, we needed to make sure that everyone involved in welcoming a new employee had proper communication. We developed new processes and checklists to make sure that all stakeholders in the process are informed and able to complete their tasks.

HOW WE DID IT

We took a few approaches to determine what would make the new hire experience better. Three months after they’re hired, new employees get a feedback form with questions on what went well and what ideas they have to improve the onboarding process. We also conduct group interviews with recent hires to get additional feedback. Meetings between Human Resources, Information Technology, and Facilities created the processes to ensure new employees are ready to go on their first day with no hiccups. Our final product changed our one-day orientation to an onboarding experience that starts with recruitment and continues through the first 90 days of employment.

Recruitment: Onboarding new employees starts before a top candidate has been identified. In our job postings and careers page, we use the phrase “Welcome Home!” to give potential candidates the impression we are a company where you stay, learn, and grow for many years. The [careers page](#) on our website and other recruitment platforms features employee testimonials on why they like to work at our organization.

Pre-Hire: Once a candidate has accepted a position and electronically signed an offer letter, he or she receives a welcome email. (Exhibit 1) It includes a link to our welcome portal, where the employee will find two short videos about the company and what to expect on the first day as well as benefits information. The onboarding checklist for HR/IT/Facilities/Managers is electronically started at this time. (Exhibit 2)

Day One: Our goal for the first day is to acclimate a new employee to our company culture and mission. Human Resources meets the new employee for an introduction to the company and completes necessary paperwork (i.e. I-9, benefit enrollment, W-4, computer log-ins, etc.). To make the first day less overwhelming, much of the additional information that used to receive on day one has been moved to a monthly and quarterly presentation. The employee is given a welcome packet (Exhibit 3) with contact information for their questions, a game board with scavenger hunt items to help acquaint the employee with key coworkers and places within the company, FAQs, as well as a map with restaurants close to the office and delivery options. They’ll also find in-depth benefit information, a schedule for the first day, a management organizational chart, their job description, and other important information. New employees receive small gifts to welcome them to the company and are greeted with a “Welcome to IHFA!” card at their work station that is signed by everyone on their new team.

Monthly: Employees attend their second onboarding presentation the third week of every month. Human Resources describes company policies and procedures and each new employee receives company-branded gift. Voluntary benefits are explained, a tour of the building is conducted, and any additional questions are answered. At the end of the monthly presentation, employees use their phone to scan a QC code, which routes them to a brief survey on Google forms regarding their onboarding experience so far to help continually improve our process. (Exhibit 4)

Quarterly: The goal of the final onboarding presentation is to have a little fun. The session gives new hires a chance to ask any lingering questions they may have as they settle in to their new roles. The session gives them a deeper look into the company and our vision and mission, while giving them a chance to get to know others outside of their department. The meeting starts with a breakfast and welcome from a top official in the organization. There are presentations from facilities, Human Resources, Wellness Committee, and Information Technology. We also have a video in which managers of every department introduce themselves and explain what their group does. This time is also used to play a couple of icebreaker/getting-to-know-you games so our new employees can bond with each other (Exhibit 5) while they get additional information on benefits and complete necessary compliance training (e.g. harassment, cybersecurity, Fair Housing, workplace violence). The week before the quarterly presentation, Human Resources asks employees to complete a survey as a final item on their game board. The game board is turned in and prizes are awarded for completing all items. The meeting only lasts a couple of hours, but it is a good way to make sure employees feel welcome and “at home.”

MANAGEMENT OPPORTUNITY AND AGENCY IMPROVEMENTS

It's easy to forget that the most important piece of your business are your employees. Investing time in the onboarding process helps solidify company values in new employees as well as welcome them to the organization. From recruitment to hire, the process needs to be candidate/employee focused and that is what our new onboarding process accomplishes. Employees have been very satisfied with our process and it has helped Idaho Housing to be voted as a "Top 10 Place to Work in Idaho" several years in a row. How you handle final candidates and new employees sets the stage for them to feel like IHFA was their best choice. The "employer of choice."

During the COVID-19 pandemic, we simply interviewed and on-boarded employees virtually, with no lag in efficiency or timeliness in getting our jobs filled. Our production and recruitment speed continued at the same pace as before the pandemic began because we were able to fill jobs as they became open using technology.

EASY TO REPLICATE

Any organization can implement an onboarding process. Our process is successful because we have interviewed key people to find out what is important to a new employee. To replicate our success, an organization should identify the stakeholders in the process, interview recent new hires, and focus on the experience that someone has when she or he started with the company. There should be a balance between giving necessary information and not overloading someone with material that will be forgotten. Investing time incrementally in a new employee starts the foundation for a long-term relationship between an employee and the organization, which is the desire of both parties. It is a key ingredient to a company's success.

Exhibit 1

New Employee Welcome Email

Hi Vanessa!

Welcome to Idaho Housing and Finance Association!

Your first day is scheduled for June 8, 2020, please arrive at the Park Plaza office at 565 W Myrtle Street at 8:30 am and Anna Teinert from Human Resources will meet you in the lobby of the building for your orientation. Please make sure you bring two forms of ID to complete your I-9 and a voided check for direct deposit. During orientation, we will assist you in completing your benefit enrollments. If you plan to enroll in benefits, please come prepared with your dependents/beneficiaries full names, birthdates, and social security numbers.

This year the IRS has created a new W4 form. The 2020 Form W-4, Employee's Withholding Certificate, is very different from previous versions. New hires will be required to complete this form before, or during orientation. We encourage new hires to review the attached 2020 W4 and visit the IRS's Tax Withholding Estimator prior to your first day. This will help ensure that your orientation goes smoothly. [Click here to be redirected to the IRS's Tax Withholding Estimator](#)

Your offer letter will come to your email through DocuSign. After you add your signature, you will receive the executed copy.

Prior to your orientation, we ask that you use the link below to view a brief orientation to the company and what to expect on your first day. Just click on the thumbnails on the portal to view the videos. Through that link you will also see a company overview and a link to our benefit summary.

[Orientation Video Link](#)

- Password: orientation

We are excited to have you join our team! Please let me know if you have any questions.

IHFA Onboarding Checklist

Employee Name:

Manager/Supervisor Name:

Onboarding Mentor Name:

Prior to First Day

Goal: To ensure new employee feels welcome and comfortable in new position.

Task	Responsibility	Due Date	Completed
1. Maintain communication with new employee Notify employee of any delays in the hiring process. <ul style="list-style-type: none"> ○ Welcome letter/confirmation email (Exhibit 1) and additional resources (parking, commuting). ○ Arrange 1st day orientation meeting with Manager/ Supervisor and mentor. (Exhibit 2). 	HR	Prior to start date	<input type="checkbox"/>
2. Assign an onboarding mentor to new employee to establish successful integration into the new organization. (Exhibit 2 and 2.1)	Manager/ Supervisor	Prior to start date	<input type="checkbox"/>
3. Establish training schedule for new hire (at least day 1) (Exhibit 3).	Manger/Supervisor/ Mentor	Prior to start date	<input type="checkbox"/>
4. Submit IT Helpdesk to IT Department w/ specifics (must be at least 5 days prior to arrival) (Exhibit 4) <ul style="list-style-type: none"> ○ Schedule IT training with new hire- include mentor on invite. (10am-11am) 	HR	5 days prior to start date	<input type="checkbox"/>
5. Computer and Phone set up: <ul style="list-style-type: none"> • Working monitor • Mouse & mouse pad • Keyboard • Headset for phone-if needed 	IT	Prior to Start Date	<input type="checkbox"/>

Exhibit 2

Task	Responsibility	Due Date	Completed
6. Desk and workspace set up/cleaned <ul style="list-style-type: none"> Clean out drawers Chair 	Facilities	Prior to start date	<input type="checkbox"/>
7. Work space set up, organized, cleaned <ul style="list-style-type: none"> Verify items from facility & IT are at desk. Welcome card (Exhibit 5) given to manager for team to sign. Set on desk for first day and set up FAQ cards/phone list (Exhibit 6) 	Manager/Supervisor/Mentor	Prior to start date	<input type="checkbox"/>
8. Keys and parking information (Exhibit 7)	Facilities/HR	Prior to start date	<input type="checkbox"/>
9. Email out introduction of new employee to team. (Exhibit 8) <ul style="list-style-type: none"> Business cards, if needed email to copy center. Credit Card 	Manger/Supervisor	Prior to start date	<input type="checkbox"/>

Day One-First Week

Goal: Connect new hire to staff and resources for role. Go over responsibilities and expectations. Introduce new hire to department structure and goals.

Task	Responsibility	Due Date	Completed
10. Keys, parking, and building access information. Provide welcome packet with new hire login information (Exhibit 9) Orientation overview: Benefits, payroll, policies, ADP, and other new hire documents. (Exhibit 10)	HR	Day 1	<input type="checkbox"/>
11. Welcome and introduce employee to team members and onboarding mentor.	Manager/ Supervisor	Day 1	<input type="checkbox"/>
12. Office tour, work space, mail procedures, copy or fax. Office supplies. Phone use (IT?).	Manager/ Supervisor/Mentor	Day 1	<input type="checkbox"/>

Exhibit 2

Task	Responsibility	Due Date	Completed
13. Review the following with new hire <ul style="list-style-type: none"> ○ Job descriptions and requirements ○ Sick or late procedures ○ Hours, lunch & break schedule. 	Manager/Supervisor	Day 1	<input type="checkbox"/>
14. Organize a team lunch or get together	Manager/Supervisor	First Week	<input type="checkbox"/>
15. Meet with new hire and go over: <ul style="list-style-type: none"> ○ Department goals or objectives ○ Projects or key initiatives 	Manager/Supervisor	First Week	<input type="checkbox"/>
16. Schedule a “Check In” meeting with employee to discuss progress and address questions	Manager/Supervisor	By the end of the first week	<input type="checkbox"/>
17. Schedule weekly “Check-In” meetings with mentor for first month (no longer than 30 minutes)	Mentor	By the end of the first week	<input type="checkbox"/>

Exhibit 2

First Month

Goal: Provide opportunities for feedback and development. At this point employee should understand role and responsibilities. Ensure development of team and business relationship.

Task	Responsibility	Due Date	Completed
18. Ensure time-sensitive forms have been submitted (benefits)	New Hire	By the end of the first month	<input type="checkbox"/>
19. New hire attend monthly policy and procedure meeting with building tour. (Exhibit 11)	HR	Within first month	<input type="checkbox"/>
20. Ensure employee is included in appropriate department and unit meetings.	Manager/ Supervisor	Within first month	<input type="checkbox"/>
21. Maintain regular one-on-one meeting to provide performance feedback, address questions.	Manager/ Supervisor	By end of first month	<input type="checkbox"/>
22. Provide opportunity for employee to provide feedback on onboarding process. Survey. (Exhibit 12).	HR	By the end of first month	<input type="checkbox"/>

Exhibit 2

First Quarter

Task	Responsibility	Due Date	Completed
23. Complete 90 day feedback form. Onboarding survey.	New Hire	Within first 90 days	<input type="checkbox"/>
24. Quarterly orientation (Exhibit 13) <ul style="list-style-type: none"> • Executive Welcome • Facilities • Wellness Committee • Department Overview • Fair Housing • IT Security Training • Harassment/Safety • Voluntary Benefits 	HR	Within first 90 days	<input type="checkbox"/>
25. Employee turn in “Welcome Home” passport at quarterly orientation	New Hire	Quarterly orientation	<input type="checkbox"/>
26. Provide “check in’s” to new hire.	Manager/ Supervisor	Within first 90 days	<input type="checkbox"/>

First Year

Task	Responsibility	Due Date	Completed
27. Schedule six month performance review	Manager/ Supervisor	6 month after start date.	<input type="checkbox"/>
28. Continue to provide one on one check in’s to address question	Manager/ Supervisor	Within first year of start	<input type="checkbox"/>
29. Continue to provide training and support.	Manager/ Supervisor	Ongoing	<input type="checkbox"/>



**Idaho Housing
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Association

Exhibit 3



***Welcome
Home!***

It's more than just a job.

Idaho Housing and Finance Association
New Hire Packet

YOUR FIRST DAY



Direct Supervisor

Phone/Email

Mentor

Phone Email

FIRST DAY SCHEDULE:

8:30 - 10:00 HR Orientation
Company Intranet
Need to Know: Policies
Benefits Overview & Enrollment

10:00 - 10:30 Recruiter Meet Up
Wrap Up Questions
Computer Setup
Supervisor Dropoff

10:30 - 11:00 Department Meet & Greet
Meet With Supervisor
Mentor Introduction
Department Tour & Team Hellos
Begin Training

11:30 - 12:30 Lunch Break

12:30 Training

GOING FORWARD:

Second day onward, I arrive at: _____

If I am sick or running late: _____

My Policies and Procedures session is on: _____

IMPORTANT CONTACTS:

IT HelpDesk:

Andrew/John/Cody Ext. 4737
helpdesk@ihfa.org

HR Contacts:

Katie Ext. 4773
Micah Ext. 4734
Krista Ext. 4723

Payroll & Benefits:

Melissa Ext. 4080
melissam@ihfa.org

Facilities:

Chloe(Jefferson St.) Ext. 4080
Stacie (Myrtle St.) Ext. 4831

OPTIONAL TO DO'S:

Enroll In
Nationwide



Enroll In
Smartdollar



WELCOME HOME PASSPORT

Your First 90 Days

MEET THE NEIGHBORS

Get introduced to your mentor and your team.



CLOSING PAPERWORK

Meet with IT to go over workspace and have phone training.



CHECK OUT THE COMMUNITY

Sit down with your manager to go over your job description, schedule and your training.



CONTINUING EDUCATION

Complete training plan as assigned by your manager.



HR CHECKIN

Follow up with your recruiter and touch base about your first month



HOA RULES

Attend the monthly Policies and Procedures meeting, have a tour of the building and complete an onboarding survey.



NEIGHBORHOOD BLOCK PARTY

Attend the quarterly new hire meeting, learn more about your new home, IHFA.



**Idaho Housing
and Finance**
Association

NEED HELP



PAYROLL

- Benefits
- Overtime
- Time Off
- Direct Deposit
- 457 Contributions

Melissa Merriman
melissam@ihfa.org
Ext. 4080

HR QUESTIONS

Micah Matthews
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Ext. 4734

Katie Shamy
katies@ihfa.org
Ext. 4773

Krista Stringer
kristas@ihfa.org
Ext. 4723

Lydia Aguirre
Director of Human Resources

- Policy
- Benefits
- Enrollments
- Miscellaneous

COMPUTER / PHONE

- Phones
- Computers
- OnBase
- Drives
- Software

IT Helpdesk
helpdesk@ihfa.org
Ext. 4737

FACILITIES

Chloe Edwards - Boise Plaza
Chloee@ihfa.org
Ext. 4106

Stacie Ruffing - Park Plaza
stacier@ihfa.org
Ext. 4831

- Parking
- Access FOB's
- Workspace
- Office Supplies

PAYROLL FAQs

STARRING MELISSA MERRIMAN

Melissa Merirriman, Payroll Analyst extraordinaire answers a few commonly asked payroll questions. If you would like to know more, reach out to Melissa at:

melissam@ihfa.org

Ext. 4080

OVERTIME

All overtime needs to be approved prior to being taken. When you anticipate working OT, submit an OT request in OnBase. At the end of the week return to OnBase and complete the OT Details Form - Fill it out like a time card, enter ALL of your time, including regular time and sick or vacation time.

VACATION AND SICK

In ADP enter time by selecting: **Myself > Time Off > Request**

Click on the blue **'Request Time Off'** button.

Do NOT enter anything on **'My Timecard'**.

RETIREMENT ACCOUNT

In Front Porch, navigate to: **Working Here > Benefits**, and select **Retirement Nationwide** from the drop down to find detailed enrollment instructions.

Don't forget to set up your account with **Nationwide!**

DIRECT DEPOSIT

Changes may be made by sending a voiced check, or print off from your financial institution, that lists the account and routing number.

You can split your check between multiple accounts.

LEAVE WITHOUT PAY

Leave Without Pay should be used only in emergency situations. If you need to take **Leave Without Pay (LWOP)** you will first need to submit the request through **OnBase**. While in **LWOP**, you will not accrue vacation or sick time.

INSURANCE DEDUCTIONS

If you are newly enrolled in benefits, your first deduction will be on the 15th of the month following your eligibility date.

If eligible March 1st, deductions will begin on March 15th.

PAY DATES

IHFA employees are paid on the 15th and the last day of the month. If that day falls on a weekend or a holiday, you will see your direct deposit the day before.

You've got to try...

- 1 Bardenay
- 2 The Wylder
- 3 Fork
- 4 Flatbread
- 5 The Reef

Busy Day? These places Deliver!

- Jimmy Johns
- Panera Bread
- Chipotle
- Pita Pit
- Grub Hub



OnBoarding Survey



On-Boarding Survey

How comfortable did you feel starting your new position with the information you were provided prior to your first day?

- | | | | | | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What additional information would have been nice to have prior to your first day?

Your answer _____

How would you describe the length of your on-boarding with HR on your first day?

- ☐ Too Short
- ☐ Too Long
- ☐ Just Right
- ☐ Other: _____

Is there any information you could have done with more of?

Your answer _____

On a scale of 1-10, how would you rate your first day?

1 2 3 4 5 6 7 8 9 10

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

What might have made your first day better?

Your answer

How would you rank your departmental training

1 2 3 4 5 6 7 8 9 10

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

What might have made your departmental training better?

Your answer

In terms of computer access, did you have:

- ☐ Every access and program required
- ☐ Most accesses
- ☐ Not very many accesses
- ☐ None of the accesses
- ☐ Other: _____

Did you receive in person phone training with IT?

- ☐ Yes
- ☐ No
- ☐ Other: _____

Is there any additional feedback that you would like to share?

Your answer _____

Submit

Getting To Know You

What is your name?	
What's your favorite candy?	
What's your favorite color?	
In what department are you working and what is your title?	
What is your favorite part about working at IHFA so far?	
If you could have one super power, what would that be?	
If you could live anywhere, where would that be?	
Who is your hero?	
What is your favorite movie?	
What is your favorite song/artist?	
What is your favorite sport to play or watch?	
What is your favorite food?	

Employee Name _____

IHFA Employee Scavenger Hunt

After finding an employee for each of the categories (make sure they sign your form), return your form to Human Resources. You can only use a person once.

Wearing Purple	
Works at Boise Plaza Office	
Works at Park Plaza Office	
Talks to borrowers over the phone	
Wearing earrings	
Likes to play tennis	
Moved to Idaho in the last 10 years	
Enjoys cooking	
Plays a musical instrument	
Attended Boise State University	
Owens a dog	
Owens a cat	
Has lived on a farm	
Likes to golf	
Has never been to Disneyland	