

Remodeling Onboarding

Louisiana Housing Corporation

Management Innovation: Human Resources

HFA Staff Contact

Na'Tisha Natt

nnatt@lhc.la.gov

The Onboarding Project had long been a challenging and arduous task that Human Resources was reluctant to take on due to the volume of information and the coordination of staff necessary to properly onboard. Employees make up their mind in their first 90 days of employment whether their time at your organization will be temporary, good until something better comes along, a good place to gain some experience, or a place from which they can see themselves retiring. At LHC, our Onboarding woes involved work stations and computers not set up timely, employees forgetting about 30-day deadlines to select benefits, little knowledge of housing programs and their purposes, employees not completing required training within the first 90 days of employment, and a myriad of other minor issues that needed to be addressed on an individual basis.

Combining ideas from both the 2018 NCSHA conference and the 2018 Louisiana State Civil Service Business Summit, both held in October 2018, LHC implemented an innovative method to improve onboarding. Realizing that Human Resources could not tackle the project alone and that other departments were equally critical for program success, a multi-disciplinary task force was formed. The team included the directors of Human Resources, Facilities Operations, and Technology Services, and staff members from Payroll, Employee Development, Public Affairs, and Strategic Initiatives. Regular meetings were held to ensure the continued forward momentum of the project.

Remodeling Onboarding addresses two of LHC's strategic objectives, including: 1. Increase the use of technology to improve communications and operations internally and externally; and, 2. Invest in the professional development of employees. The program was complete by February 28, 2019 and we began our new Onboarding program with our first hire after March 1, 2019.

Onboarding vs. Orientation

With the team formed, our first task was to define Onboarding versus Orientation and the information that needs to be conveyed during the course of the programs. Onboarding begins pre-employment and includes Orientation. Orientation is conducted as much as 6 weeks after the employee's hire date due to the low volume of new hires. The Task Force identified the information that was currently included in the Orientation Program that would be better addressed by individual Onboarding Team Members prior to Orientation. The Task Force also determined the information not currently in Orientation that could be included to assist the new employee acclimate to LHC.

Upon review of the information, the team determined the factors to be addressed during the Orientation Program and the factors to be addressed during the remainder of the Onboarding Program.

Information and Resource Gathering

After determining the required information for Onboarding, the Task Force set about to collect forms, flowcharts, website addresses, written standard operating procedures, diagrams, handouts, work guides, training courses and other information both required and desired in the Onboarding process. The team also identified the personnel that are crucial to the initial development of the employee and how their roles contributed to the Onboarding process.

The result of this step was an outline of the material and electronic resources necessary for a successful Onboarding Program. The team also identified the personnel that would make up an individual's Onboarding Team, which include staff from Human Resources, Technology Services, Public Affairs, Facilities Operations, Payroll, Accounting Services, and Employee Development. The Onboarding Team also includes the direct supervisor of the new employee.

Organizing resources into a time-based program

With the information and resources gathered, the team assigned a set a time schedule for all factors in the process. Time divisions include: Pre-employment, 1st day, 1st week, 2nd week, 1st 30 days, 1st 60 days, and 1st 90 days. Not all departments had factors to list in each time division.

Role development

The next step in the process was to develop the roles of each individual on the Onboarding Team. Below are the different roles of the Onboarding Team and their areas of responsibility.

- a. Human Resources: ambassador, pre-employment drug testing, benefits, induction paperwork, orientation
- b. Facilities Operations: office space, safety, driving eligibility, office supplies
- c. Payroll: timesheets, requesting leave
- d. Employee Development: initial training, annual training, the Comprehensive Public Training Program, individual training curriculum for the position
- e. Technology Services: hardware, email, access to systems, helpdesk, identification badges
- f. Accounting: Purchase orders, budget, travel
- g. Supervisor: work space setup, work environment, department rules, department tools, performance planning, department culture

Checklist development

Incorporating the information and resources gathered, the time-based factors, and the roles, checklists were developed for each function. Human Resources, Payroll, Technology Services, and Facilities Operations all had existing new hire checklists. These checklists were used within the department to ensure all specific new hire functions have been completed. The Onboarding Checklist are more broad. For example, the Human Resources Onboarding Checklist includes ‘enroll in benefit plans’; the Human Resources New Hire Checklist has separate checks for Health insurance, dental insurance, vision insurance, etc.

The most important checklist is the New Employee’s Onboarding checklist. The New Employee’s checklist is also divided by time and lists the information the new employee should know after their first week on the job, after their first 30 days, and after their first 60 days.

When developing the checklists, the team found that there was some information that we felt the employee needed in hard copy to quickly and easily reference. To meet this need, the team created a Desk Reference for the new employee. The Desk Reference is a binder which includes information such as the current employee directory, the employee’s position description, benefits and salary structure information, a list of Human Resources policies, and other pertinent information. Copies are placed in sheet covers within the binder. As new employees go through Onboarding, they have the opportunity to add to the binder or remove some documents to include information that they may need to reference on a daily basis. The Desk Reference is designed as a tool to aid the employee all during their employment at LHC.

Identification and development of missing pieces

After the checklists were completed, they were shared with the Executive Team and the Leadership Team to review and identify missing pieces of Onboarding Process and how the missing information can be collected and best communicated to the new employee. The Task Force was very thorough as no comments were returned. Since the program checklists are electronically based and Onboarding Team members download the checklists for every new hire, missing pieces can be easily added and checklists easily updated.

Deployment

The new Onboarding Process was completed by February 28, 2019. Our first two employees to go through the new process were hired on March 25, 2019. As of May 1st, three additional employees have joined our team and began the Onboarding Process. It is a 90-day process, so all five employees are still going through it. To date, the process has been successful; the flow, timeliness, and structure have been sound. We made minor tweaks, but the program is designed to be continuously evolving. We have already noticed that new employees are more knowledgeable about the programs LHC offers. We believe that the long-term effects of our Onboarding Process will improve agency operations through better retention of employees and a workforce better educated about the services that LHC provides to Louisiana residents.

OFF-BOARDING

During our project, we realized that it would also benefit the organization to have a more formal Off-boarding process as well. The Task Force reasoned that Off-boarding includes a majority of the same activities as Onboarding, and that the activities were just the opposite. Rather than request access to a website, we request removal of access to a website. Rather than enroll employee in a health care plan, we remove the employee from a health care plan.

We followed the same process steps as Onboarding, but much of our work had already been completed. The resources were organized in a time based program, beginning upon notification of separation and ending approximately two weeks after separation. Roles were easily identified and checklists were created. The Off-boarding checklists were sent to the Executive Team and the Leadership for review to identify any missing pieces. Recommendations were incorporated and the Off-boarding Program was completed by February 28, 2019. We were able to test it by mid-March as Human Resources received a letter of resignation only a few days after completion.

ONBOARDING/OFF-BOARDING MODEL

The steps and materials in the model can all be easily adapted to any Housing Finance Agency. The only cost related to the project was employee time, which was well worth the benefits the remodeled Onboarding Program provides. Spending the time identifying challenges and proactively trouble-shooting possible failings in the system prior to them occurring will result in less future time spent addressing issues and less disruptions during the work day.

The checklists are maintained electronically as we wanted our process to be continuously evolving. The numerous documents included with the submission of this project can be easily replicated, readily re-branded, and adjusted to fit the needs of other organizations. We know that others will find the same success as LHC did in Remodeling Onboarding.