



A Case Study in Onboarding

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CUPA-HR Webinar

Presenter



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North Carolina State University

Agenda or Objectives

- How and why the Onboarding Center came to be.
- Who we support and the services we provide.
- Lessons learned/tips on starting an onboarding program.
- Onboarding by the numbers.





NC State By the #s



- 37,556 Students
- 2,463 Faculty
- 6,985 Staff
- a gazillion student and temporary employees
- 12 colleges
- 17 administrative, research, advancement, student affairs divisions
- More than 500 departments
- Almost 2500 onboarding appointments last year

Poll Question

How many faculty/staff do you have at your institution?

- 1-500
- 501-1500
- 1501-5000
- 5000+

Poll Question

Do you have an established onboarding center/office?

- Yes
- No
- Have one in the works
- Hoping to have one eventually

Poll Question

Who provides your onboarding support/services now?

- o Central HR
- o Localized HR
- o Supervisors
- o Anyone who is available
- o The new employee figures it out on their own
- o Other
- o Not sure

Onboarding Center (OBC) History

2012: Campus wide evaluation of onboarding tasks

- Focus Groups and Listening Tour
 - Recent Hires
 - Supervisors
 - Departmental HR Representatives
 - Central Human Resources
 - Campus Partners (Transportation, ID Card, Office of IT, many Others)
- Decentralized onboarding processes
- Done differently in over 500 departments

Onboarding Center (OBC) History

2013: Onboarding Center Opened

- **Onboarding Center** opened to provide consistent experience for tasks that all employees needed to complete at the *university level* (Direct deposit, campus credentials, parking, tax forms, I-9, benefits information, ID Cards, etc.)
 - Required coordination with variety of campus partners to create collaborations and integrations.
 - Staff of 3 onboarding specialists, 1 office coordinator, and 1 manager
- **Departments and Supervisors** continue to provide *unit specific onboarding tasks* (computer assignment, system access requests, job related equipment, keys, etc.)
 - OBC provides just-in-time resources to supervisors/departments when hiring new employees.

Build strong relationships early and maintain them.

- Department HR Representatives & their supervisors
- College/Division HR Leads
- Office of Information Technology
- ID Card Manager
- Transportation Office Manager (parking)
- Identity Management System Manager
- Payroll
- IT Help Desk
- Benefits
- HR Information Management
- Office of Equity and Diversity
- Environmental Health & Safety
- University Police
- Dining Managers
- Motor Pool
- Campus Gym Managers
- Training database Managers



#1 Tip for starting an Onboarding Center/Process



Customer service was top priority (not compliance).

#2 Tip for starting an Onboarding Center/Process

- Service to the new employees
- Service to the supervisors
- Service to the HR Representatives
- Service to campus partners
- Service to compliance owners

How can we provide a service to that makes compliance requirements as painless as possible for the customers?

Manage expectations of staff that service is #1 priority.

OBC staff evaluations have a high focus on service.

Who are our main customers?

Employees

Staff
Faculty
Postdoc
Temporary

Departments

Department HR
Representatives

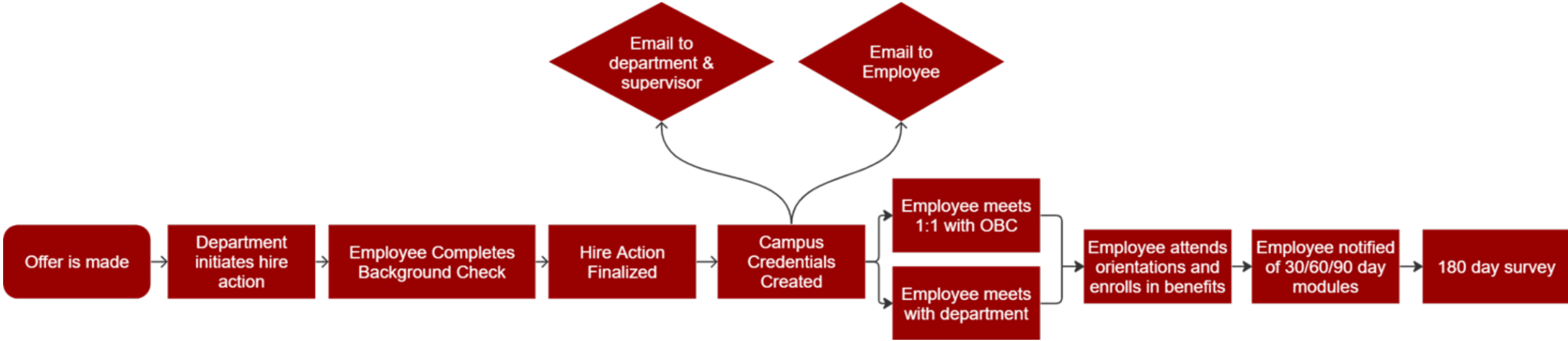
Supervisors

Services Provided

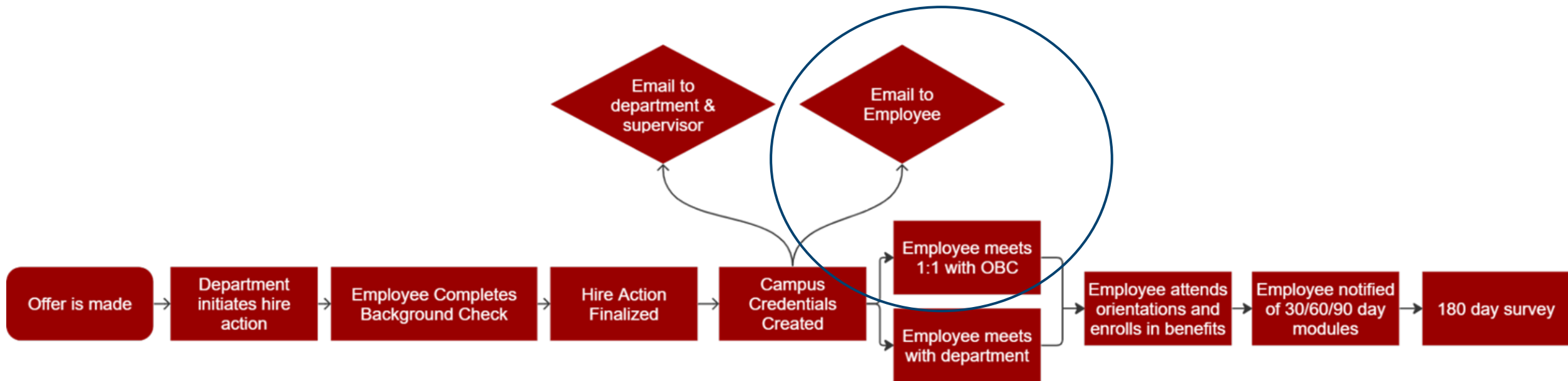
- **Meeting with new employees** (primarily 1:1 meetings, some group meetings)
- **Orientations** (group)
 - New Employee Orientation
 - Benefits Orientation
- **Continued** employee resource and engagement
- **Resources** for departments



Workflow Summary



Meet With New Employees



NC STATE UNIVERSITY

Hello {Employee Name}!

Welcome

Congratulations on your new position and welcome to NC State University! We are excited to begin this partnership and welcome the opportunity to provide helpful information as you prepare for employment as a vital member of the Wolfpack family.

NC State Onboarding Center

The Onboarding Center provides specialized services for new and returning NC State faculty and staff. We are here to guide you through a successful onboarding process in your new role. The Onboarding website contains pertinent information regarding the many services, opportunities, and benefits available through the University. Please be sure to review the 'Preparing for your First Day' section for important action items. Visit our website at onboarding.ncsu.edu for more details and resources.

Next Steps

Now that you have accepted your position, follow the steps below to get started.

STEP 1: Schedule an appointment with the Onboarding Center

Please call our office at [919-513-1278](tel:919-513-1278) to schedule an appointment for your first day of employment. Or, you can email your availability using onboardingcenter@ncsu.edu to schedule an appointment. We offer appointments Monday through Friday beginning at 7:45am through 4:30pm. Appointments typically last 30-45 minutes.

We are located in the Joyner Visitor Center on [1210 Varsity Dr., Raleigh, NC 27606](#). [Directions to Onboarding Center](#)

STEP 2: Authenticate your Unity Password and 2-Factor Set-up

Below is extremely important information about your Unity ID. You will use your [Unity ID](#) to access many of the online resources here at NC State.

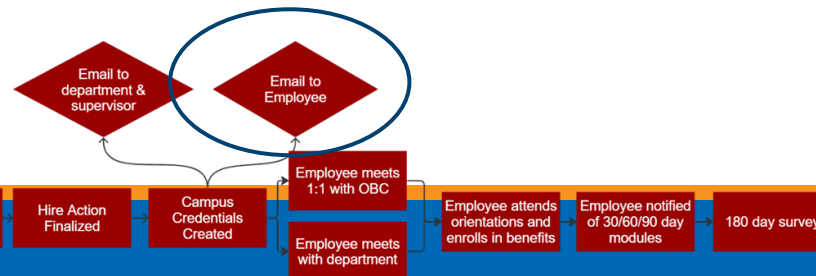
Your Unity ID is **tbburke**. Your employee ID number is **123456789**. You will need the last 4 digits of your employee ID number to create your Unity ID password.

Please [click here](#) for step-by-step instructions to create your Unity ID password and to set up Two-Factor Authentication.

STEP 3: The New Hire Checklist

Now that you have updated your Unity password and enabled two-factor authentication, please review and begin completing your **New Hire Checklist**. The checklist is a resource to guide you through essential tasks for beginning employment. One of the Onboarding Center team members will assist you with completing the checklist items during your appointment on your first day.

Employees receive auto generated email to schedule time with OBC



*Sample Emails

One-On-One Meetings

What's included?

- Unity ID and password change, Duo 2FA enrollment
- I-9 completion (Section 1 and/or Section 2)
- ID Card
- Parking permit
- Wolftime (clocking in/out, leave System)
- Direct Deposit
- Tax Forms
- Pay schedule and pay stubs
- Benefits/retirement enrollment process & deadline
- Updating personal information
- Mandatory Designation
- Disability, mobility and veteran status
- Patent Agreement
- Register for Data Security Training and Safety Checklist
- Get registered for NEO and Benefits Orientation
- And more

Employees can start any day of the week/month and meet with OBC on their first day.

Last 45 min to 1 hour

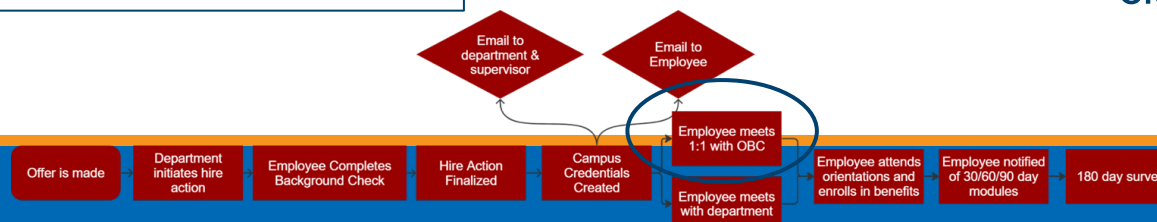
Generally done in person.
About 27% choose Zoom appointments.

Variety of comfort levels with technology

Complete action items together with an Onboarding Specialist.

Checklist action items vary based on employee classification.

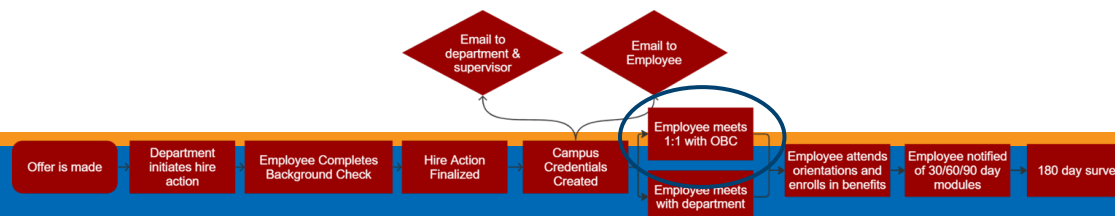
*Sample Checklist

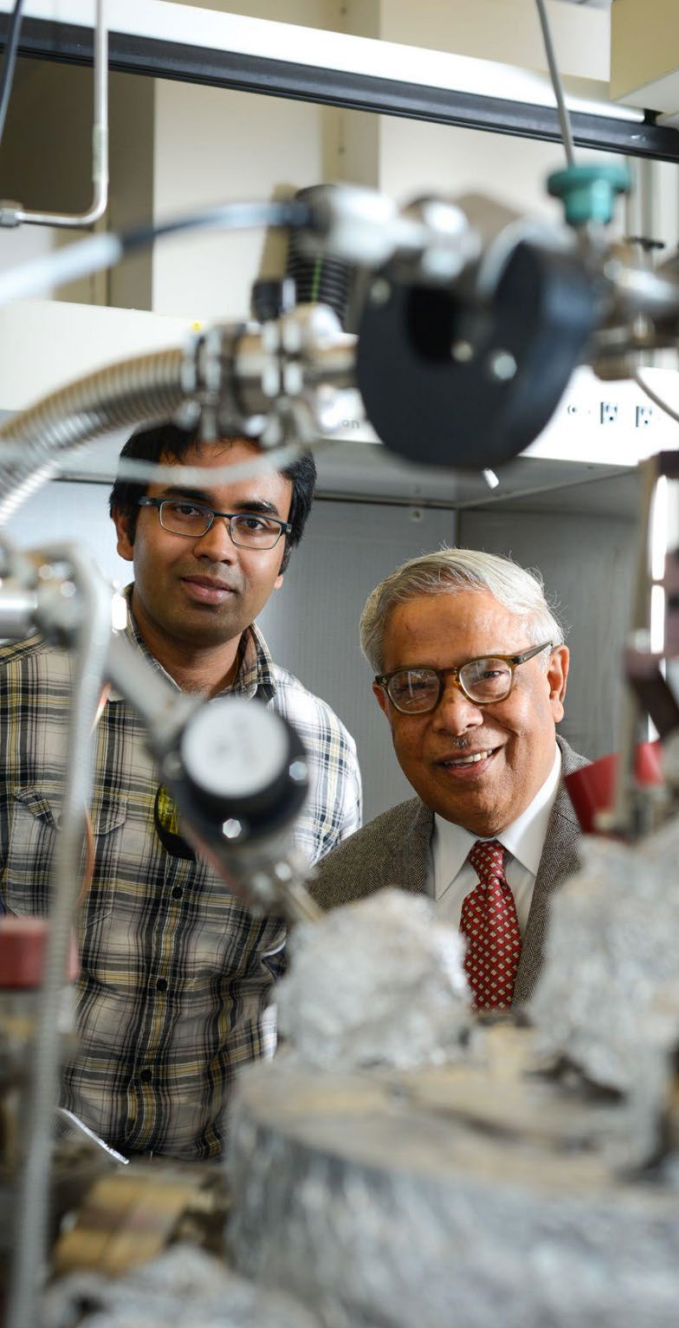




Group Meetings

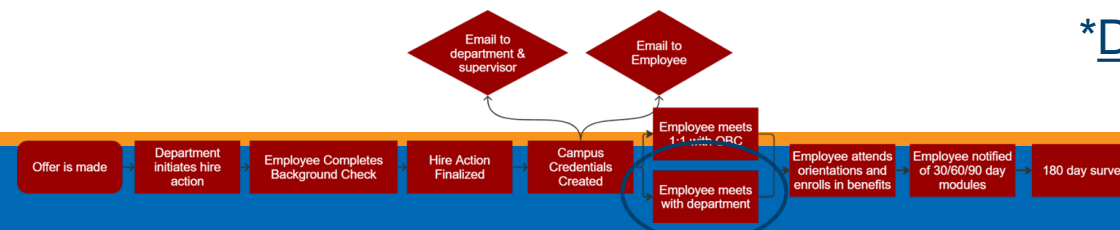
- Offered as needed based on volume
- Usually around 10 people (up to 20)
- Partner with campus departments who hire a lot of people at one time. Ex: House Officers in our College of Veterinary Medicine
- Not our preferred method





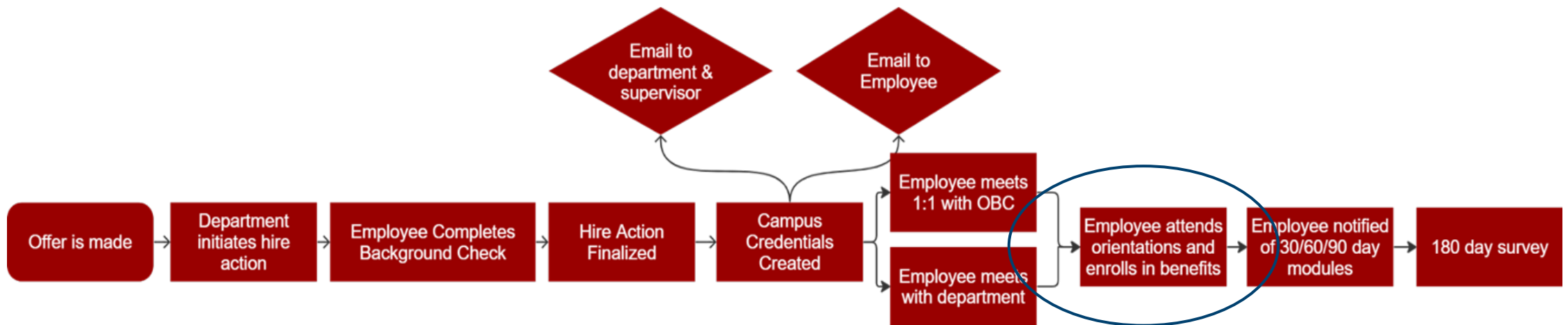
Department Meetings

- Department determines content (issue keys, system access, supervisor expectations, etc.).
- Department determines who meets with new employee
- OBC provides guidance and resources
- Job specific safety orientation



*Departmental Resources

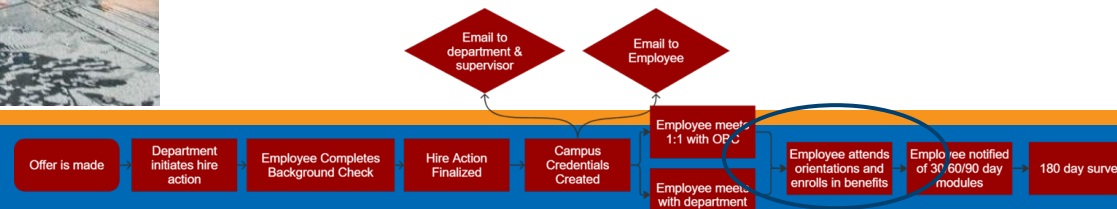
New Employee and Benefits Orientations



New Employee Orientation



- Attendees include permanent faculty, staff, postdocs and administrators. (30-60 per session)
- 3 times a month (2 in-person, 1 Zoom)
- 3 - 4.5 hours long
- In-person session includes a bus tour of campus and lunch at a dining hall.
- Content includes:
 - History and institutional message, resources
 - Diversity
 - Harassment
 - Safety/Police
- Campus partners help facilitate content



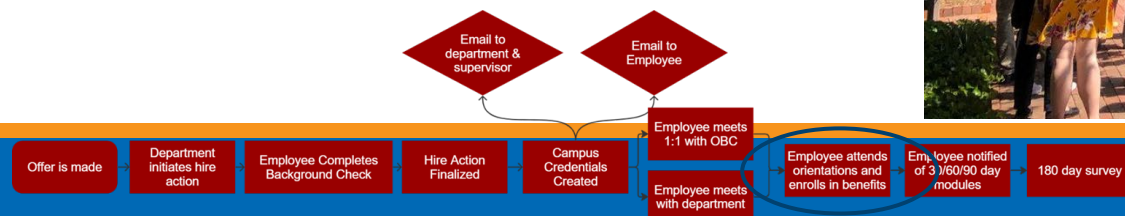
Faculty and Staff

- **Option 1: Instructor Led**
 - Every two weeks (alternating in-person and Zoom)
 - 3 hours long
 - Benefits consultant covers content
- **Option 2: Self Guided**

[*Online Benefits Information](#)

Postdoc

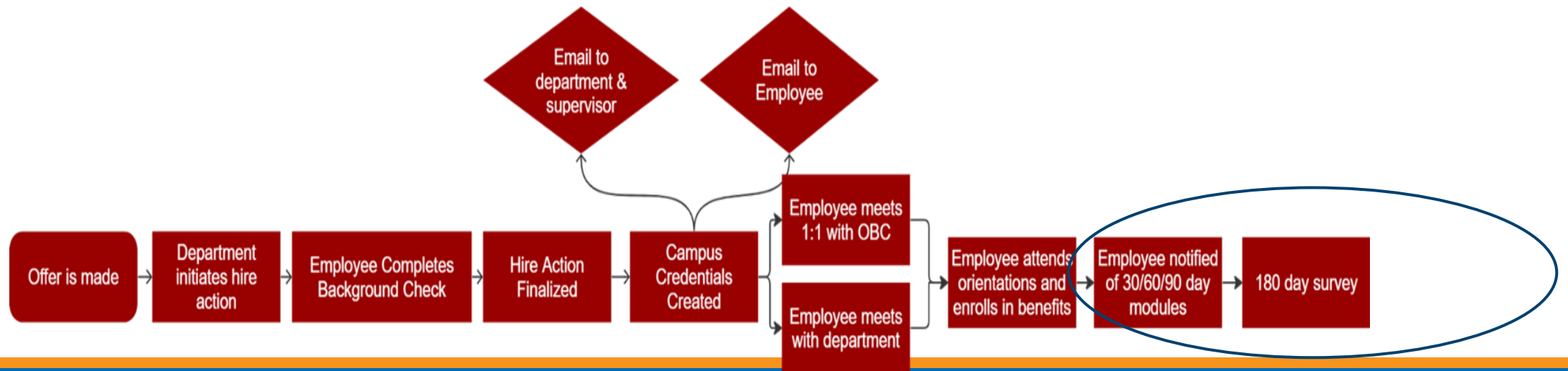
Offered two times a month via Zoom



Benefits Orientation



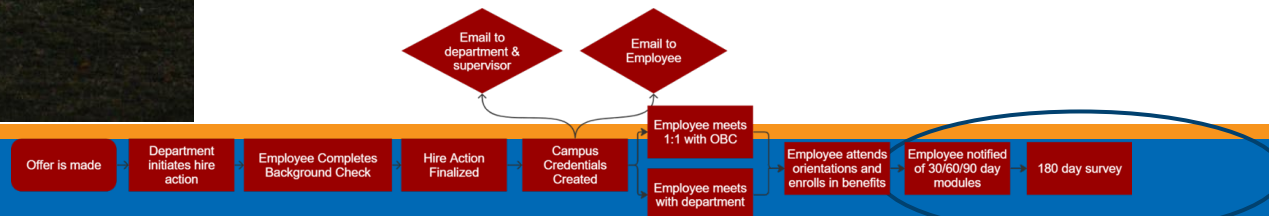
Continued Resource and Employee Engagement



Continued Resource to Employees



- *Employee Resources Website
- 30/60/90/180 Day Touch Points
- Employee Engagement
 - Campus Tours
 - NC State Trivia Events



30/60/90/180 Day Touch Points

30 Day Online Module

- Sustainability
- Wellness and Recreation
- Library Services
- IT Training and Software

60 Day Online Module

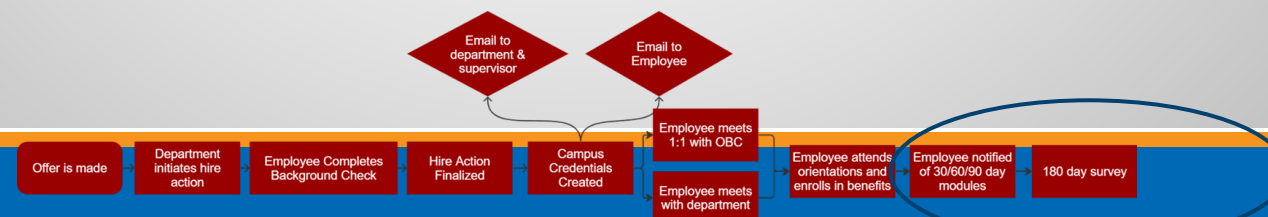
- Athletics tickets/events
- Arts NC State
- Wolfperks (local area discounts)
- Campus Smiles-On-site dental services
- Computer Lending Program
- Technology Payroll Deduction

90 Day Online Module

- Tuition Waiver
- Campus Enterprises (Dining, bookstores, golf course)
- Campus affinity groups
- Campus points of interest
- Family Resources
- Things to do around Raleigh

180 Day Survey

- Employee Entrance Experience Survey.
- Content shared with unit HR Leads two times a year.



Campus Tours



Murphy Football Center



Hunt Library



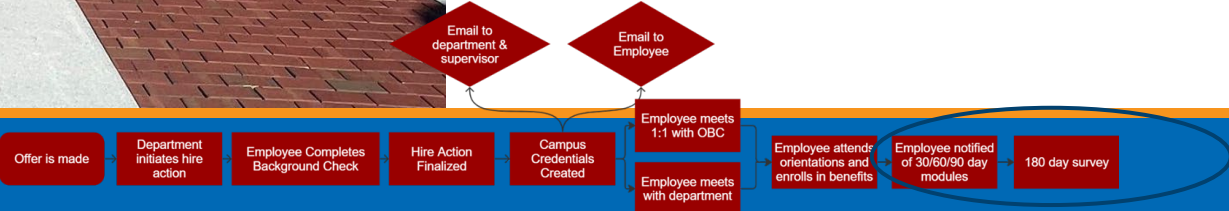
Walking Tour



Memorial Bell Tower

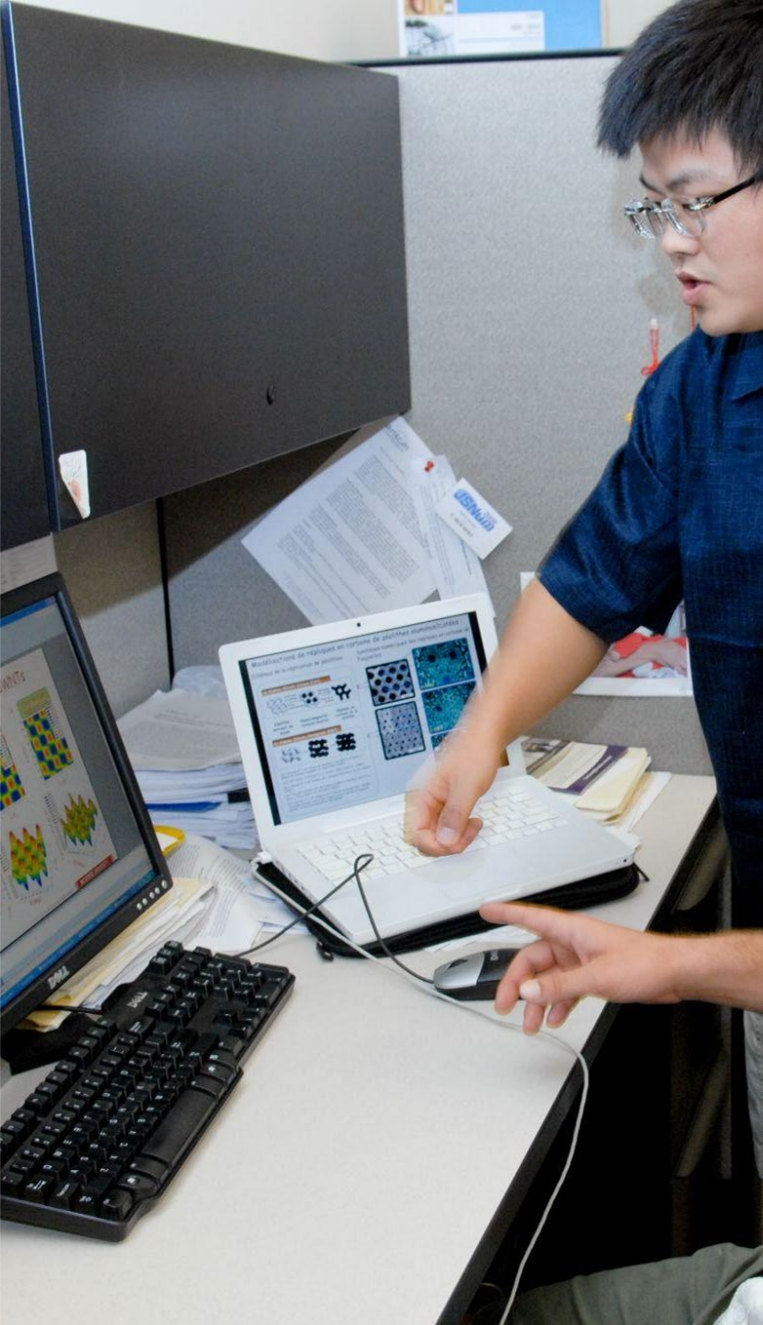


Reynolds Coliseum



Resource for Supervisors and Departmental HR Reps

*Departmental Resources



Tools and Resources

- Emails at time of hire
- Onboarding Guide (checklist)
- Tools
 - Welcome Sign
 - Sample Training Schedule
 - Assigning a Buddy
- Survey feedback (180 days)
- Consultations

[*Departmental Resources](#)

Onboarding Center

Onboarding Center ▾

Employee Resources ▾

Department Resources ▾



Welcome to the Wolfpack!

It Takes A Village

	Before Hire Date	On First Day	First 30 Days	30/60/90	180 Day+
Department or Supervisor	Enter hire action (kick off background check)	Meet with new employee to start department specific new hire checklist (assign computer, system access, keys, etc)	Finish completing department specific new hire checklist (to include safety orientation)	Check in with employee on job/department specific information Some units have college/division specific orientation for new employees	Continued Employee Engagement (varies by department)
New Employee	Sign offer letter and complete background check release Schedule meeting with OBC	Meet with the Onboarding Center to complete university new hire checklist. Meet with department representative to complete department specific new hire checklist.	Attend group NEO and Benefits orientation Enroll in benefits Complete safety and data orientations	Review optional 30/60/90 day online NEO modules	Notified to complete 180 day survey (employee entrance experience)
Onboarding Center (OBC)	Auto email sent to employee with campus credentials and instructions to scheduled meeting with OBC. Auto emails sent to department & supervisor with links to resources on department specific onboarding.	Meet with new employee to complete university level new hire checklist (I-9, direct deposit, parking, etc)	Coordinate NEO and Benefits Orientation	Manage process of sending 30/60/90 day NEO modules	Send survey to new employees at their 180 day mark Continued Employee Engagement, (campus tours, newsletter articles)
Campus Partners	*HRIM *Identity Management *Background Check	*Parking *ID Card Office *Payroll *I9 Office	*Benefits *Dining *OIED *Safety	*Libraries *Wellness *IT training *Campus Perks	*Engagement and Community Building (tours, campus knowledge)

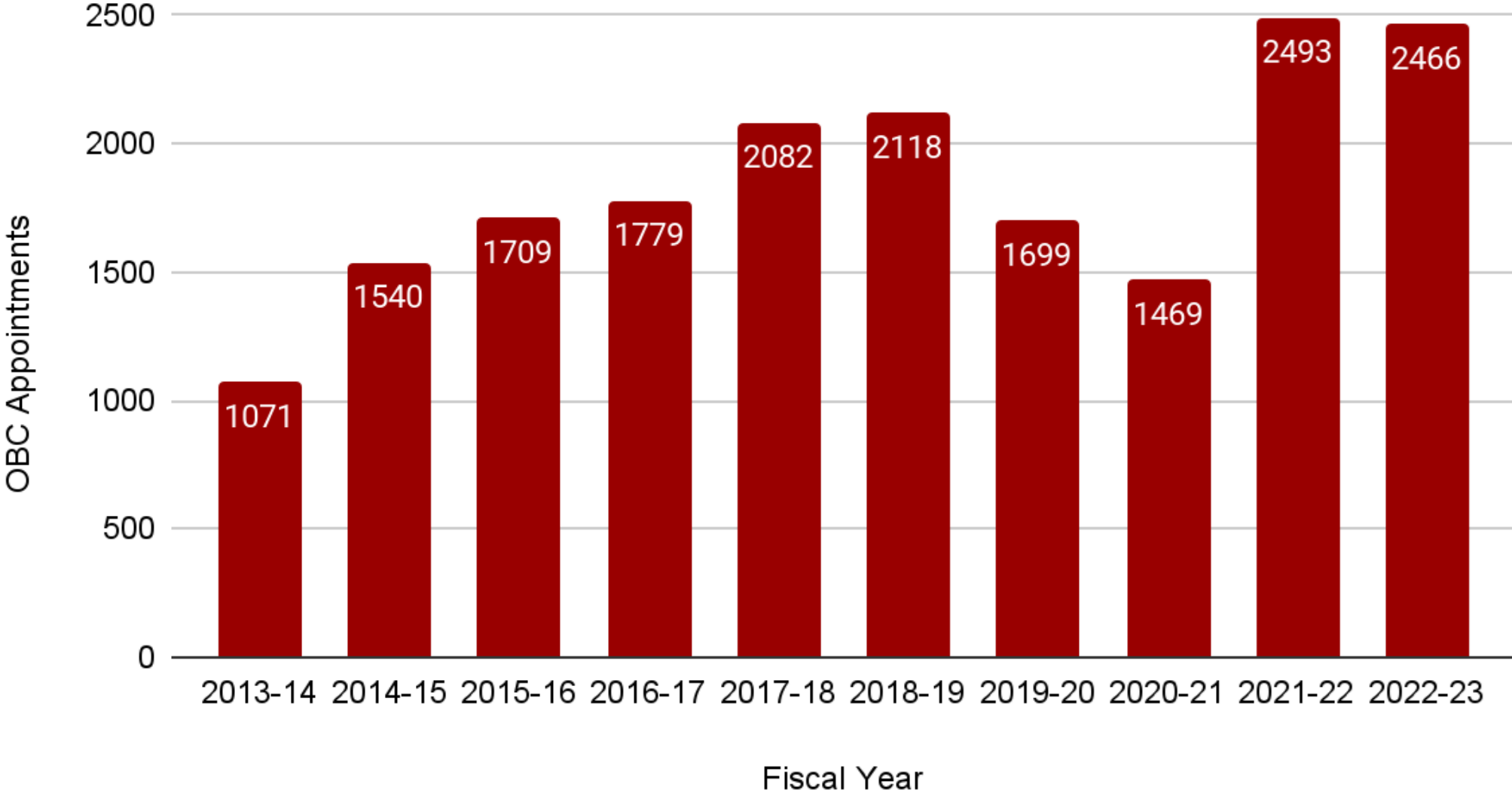
Support from OBC

Support from OBC

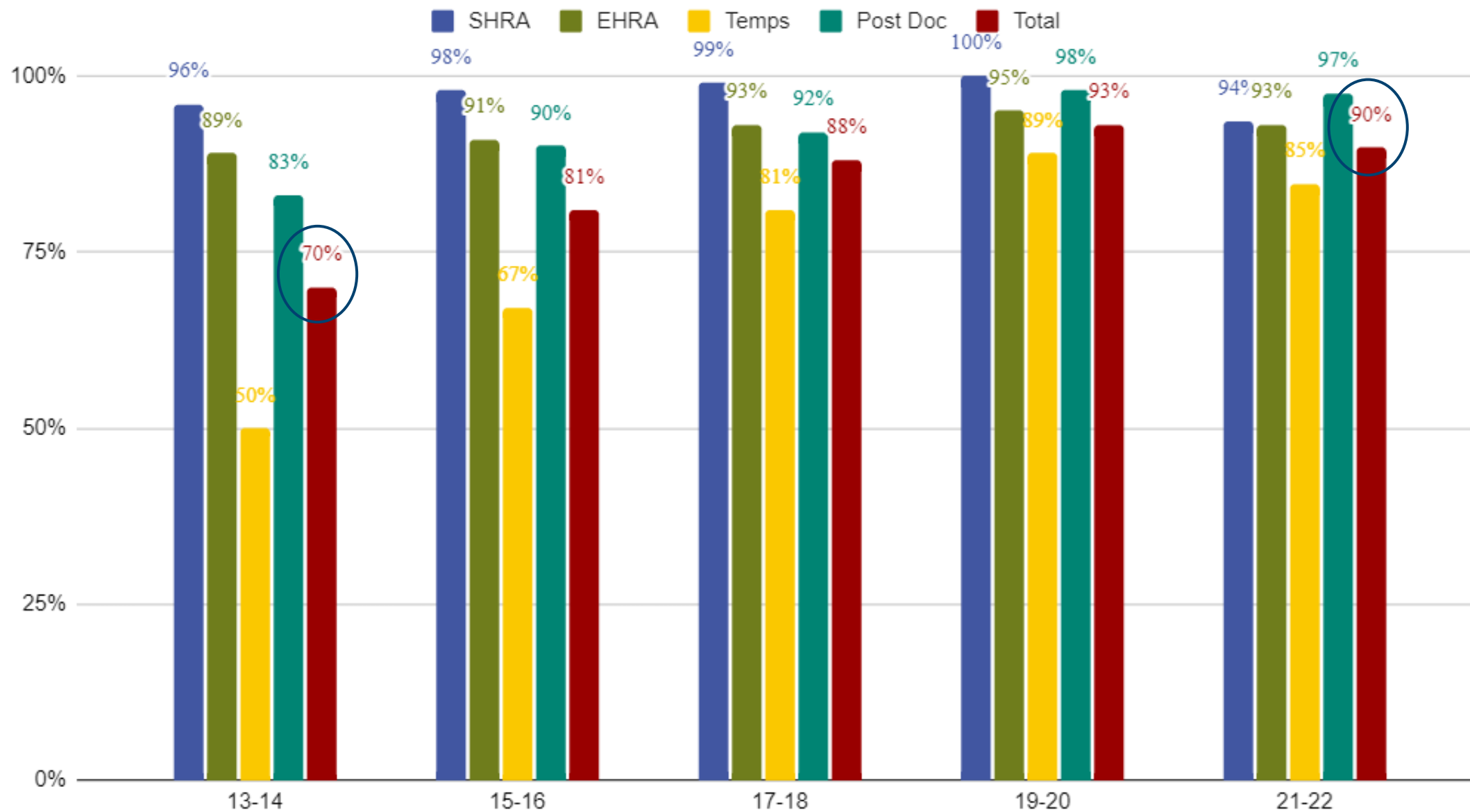
Collaboration with OBC

Onboarding By the Numbers

Onboarding Center Appointments

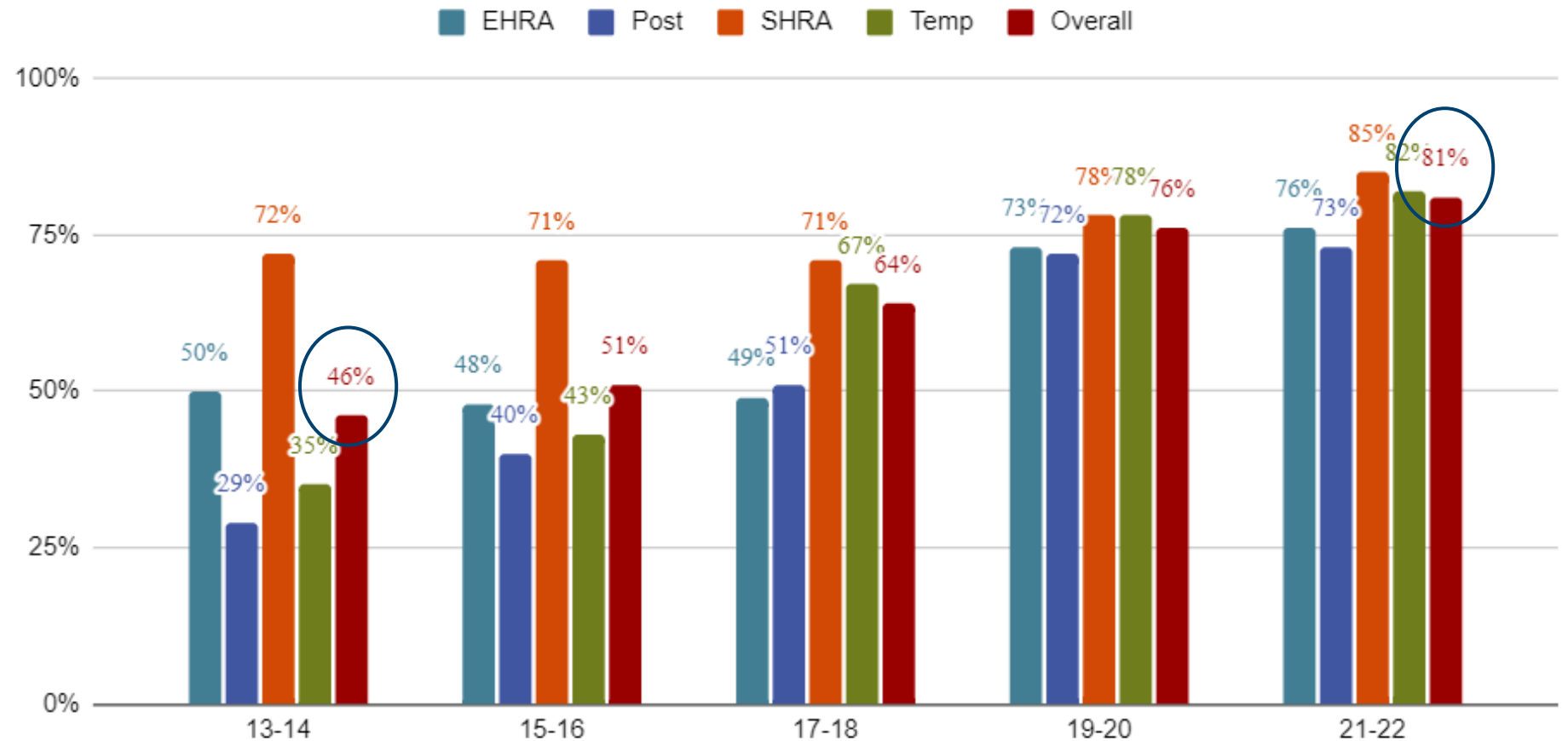


% of Eligible Employees Who Meet with Onboarding



OBC Impact

Success Rate of Actions Approved Prior to Effective Date



Increase in the number of hire actions approved **PRIOR** to the new employee's start date. (46% to 81% overall)

Without it, employees are **UNABLE** to: Get campus credentials, access campus systems (email, class rosters), log into their computer, enroll in benefits, get an ID card, get a parking permit, or Clock in/out.

Takeaways/Calls to Action

We hope you will leave with an understanding of:

- ✓ How NC State approached the creation of the Onboarding Center
- ✓ Ways to support supervisors and HR Representatives involved in the onboarding process
- ✓ How we leveraged technology to create consistent processes
- ✓ The importance of strategic campus partnerships

Have a Question?



Submit questions to our presenters
using the Chat.



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