

Sample Onboarding Checklist

KDLA provides this example to assist libraries in developing and adopting onboarding procedures. The example should be modified to meet the needs of your library and community.

Investing time and energy into onboarding new employees lays the groundwork for their success. It absorbs the items that would be found on a traditional orientation checklist and expands upon them. Most orientations are meant to last one or two days, while onboarding may take anywhere from several months to the entire first year of employment. This process ensures that a new employee receives all the necessary tools to survive and thrive at the library. The guide is grouped into the following sections:

Before the First Day

First Day

First Month

Months Two – Six

Before the First Day

<u>Task</u>	<u>Completed</u>
Staff are alerted that a new employee is joining the library.	
Employee accounts, access codes, keys, and name tags are created and ready.	
All required new hire paperwork is compiled and ready	
If employee has a dedicated space (locker/desk/cubicle,) it is emptied and cleaned for their use.	
Employee is sent a personal message at least 24 hours before their first day to reiterate the library's excitement in their addition and to remind them of important first day information such as: <ul style="list-style-type: none">• The time they are expected• Employee dress code• Breaks• Employee Parking/Entrances	

First Day

Personnel Items

<u>Task</u>	<u>Completed</u>
Employee completes W-4, K-4, & I-9 forms.	
Employee is provided access to building, e-mail, and other accounts.	
Employee completes Direct Deposit and Insurance forms.	
Employee is given a copy of Personnel Policies/Handbook to read & sign.	
Employee is shown how to record their working hours.	

Library Culture and Mission

<u>Task</u>	<u>Completed</u>
Employee learns the library's mission statement and values.	
Employee is provided a copy of the library's organizational chart.	
Supervisor explains organizational culture, expectations and communication preferences to employee.	

Library Functions and Operations

<u>Task</u>	<u>Completed</u>
Employee is taken on a tour of the library and meets their new co-workers.	
Employee is shown the library's ILS and gains experience by creating/editing their own account.	
Employee is shown how to access their e-mail, computer, and network files.	
Employee is shown the basics of how to record/collect required statistical data related to their work.	
Employee is shown various emergency plans and can identify exits to the building.	

At the end of the first day, the employee should:

- Understand the library's mission and how their new role supports it.
- Know how to access the necessary tools to complete their work
- Know what is expected of them in their new role.
- Know how to record their hours worked.

First Month

Personnel Items

<u>Task</u>	<u>Date Comp.</u>
Employee reads, reviews and signs the Personnel Handbook. Through this process they will know how to: <ul style="list-style-type: none">• Request time off.• Comport themselves while working.• Resolve differences/grievances.	
Employee fills out certification paperwork as required by the Board for Certification of Librarians.	
Employee and supervisor meet to review the first several weeks of work.	

Library Culture and Mission

<u>Task</u>	<u>Date Comp.</u>
Employee reads and reviews all library policies and meets with supervisor to ask any clarification questions.	
Employee learns how to communicate effectively with patrons and co-workers.	
Employee is “assigned” an experienced coworker as a mentor/buddy.	
Employee learns the strengths & responsibilities of the library staff and when to seek assistance.	

Library Functions and Operations

<u>Task</u>	<u>Date Comp.</u>
Employee reviews library’s website and can discuss its contents with confidence.	
Employee reviews library’s collection and learns areas of focus.	
Employee creates accounts for and samples all the library’s digital holdings and databases <ul style="list-style-type: none">• If possible, employee assists patrons when they need help with these resources.	
Employee is shown job-specific tools and services and can use them to complete assigned tasks.	
Employee assists with operating procedures, such as opening & closing the library.	
Employee assists different departments to learn more on their functions.	

At the end of the first month, the employee should:

- Be able to conduct the major functions of their role with limited or no supervision.
- Understand how their work fits into the overall structure of the library.

Months Two – Six

These following months are not as structured as the preceding time periods and as such are not categorized.

<u>Task</u>	<u>Date Comp.</u>
Employee is empowered to create or modify processes or programs with approval.	
Employee and supervisor complete six-month review.	
Employee and supervisor set goals for months seven through twelve.	
As needed, employee learns how to access and operate the building equipment (switches, thermostats, breakers, alarms)	

At the end of the first six months, the employee should:

- Transition from a training period to ongoing professional development.
- Be able to describe all the functions listed on their job description.