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# The Ins and Outs of On and Offboarding

Darcy Armstrong • Eckhart Public Library

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# Overview

- Introduction
  - Onboarding
    - Definition
    - Rationale
    - Stages
    - Examples
  - Offboarding
    - Definition
    - Rationale
    - Steps
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**Think back to the last time you started a new job.  
How was your first day? Week?**

**How was it  
structured?**

**How long before  
you really felt  
settled and part  
of the team?**

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# Onboarding

The welcoming and integration of a new employee.

The imparting of skills, knowledge, and behavior.

- Orientation
  - Paperwork
  - Training
  - Socialization
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# Why devote so much time to this?

- A positive experience for new hires
  - Valuable source of information for the organization
  - Staff retention
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# Pre-onboarding

## Start Before the First Day

Coordinate with any staff who need to be involved  
Checklists

## Solid Welcome Email

Identify anything that can be done remotely prior to the first day

## Send an Agenda

New staff should have some idea of what to expect

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# Welcoming

## First Week

Follow agenda

Build in downtime

## Tours and Introductions

Involve the rest of the staff

## Build Information Rather Than Dump Information

General to specific

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# Culture

Mission, Vision, History

Technology and Communication

Unwritten Rules

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# Job Specific Training

- Assume they know nothing
  - Define what success looks like
  - Blended learning
  - Check for understanding
  - Mentors/Shadowing
  - Flying solo
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# Transition to Full Staff Member

## Probationary Period

30, 60, and 90-day reviews

Document

## Feedback

How did new perspectives affect what you're already doing

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# Checklist

## New Full-Time Staff

### *Before First Day*

- |                                                                       |                |                                              |
|-----------------------------------------------------------------------|----------------|----------------------------------------------|
| Background Check                                                      | Completed: ___ |                                              |
| Board Approval                                                        | Completed: ___ |                                              |
| Email address                                                         | Completed: ___ |                                              |
| GSuite account                                                        | Completed: ___ |                                              |
| Onboarding sent                                                       | Completed: ___ |                                              |
| • Direct Deposit/Canceled Check                                       |                |                                              |
| • Acceptable Documents                                                |                |                                              |
| Print Resume                                                          | Completed: ___ |                                              |
| Wage Information Sheet                                                | Completed: ___ |                                              |
| Hire Date: _____                                                      |                |                                              |
| Indiana New Hire                                                      | Completed: ___ | Submitted: ___                               |
| I-9                                                                   | Completed: ___ | Submitted: ___                               |
| W-4                                                                   | Completed: ___ |                                              |
| WH-4                                                                  | Completed: ___ |                                              |
| Direct Deposit                                                        | Completed: ___ |                                              |
| Employee Information Form                                             | Completed: ___ | Submitted to Adm. Assist.: ___ In phone: ___ |
| Submitted to ADP                                                      | Completed: ___ |                                              |
| • Pay type - Salary or Hourly?                                        |                |                                              |
| • Pay class - Salary or Hourly?                                       |                |                                              |
| • Earnings Deductions - 3% PERF EE CONTRIBUTION & 11.2% PERF ER MATCH |                |                                              |
| • Direct Deposit                                                      |                |                                              |
| • Send email for timecard access                                      |                |                                              |
| Keys & Fobs                                                           | Completed: ___ |                                              |
| Email Address/ <del>GSuite</del> Login                                | Completed: ___ |                                              |
| Personnel Handbook                                                    | Read: ___      |                                              |
| Col Dev Policy                                                        | Read: ___      | Discussed: ___                               |
| Intellectual Freedom Webinar                                          | Viewed: ___    | Discussed: ___                               |
| Acknowledgement Sheet                                                 | Signed: ___    |                                              |
| Internal Controls Webinar                                             | Watched: ___   | Signed: ___ Submitted to Director: ___       |
| Library Ethics Webinar                                                | Watched: ___   |                                              |
| Evergreen Code of Ethics                                              | Signed: ___    |                                              |
| Insurance Paperwork Due: _____                                        |                | Given: ___ Submitted: ___                    |
| Life Insurance Form (RLSI)                                            | Completed: ___ |                                              |

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# Welcome Email

- Start date
  - Handbooks and policies
  - Pre-recorded trainings
  - Agenda for first week
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# First Week

## Wednesday

**9-5 Genealogy ( This includes a campus tour to meet staff)**  
[REDACTED]

Welcome!

Paperwork

Log into Accounts/Set up ADP

Questions?

Keys and Fobs with instruction from Dan (10 AM)

Campus Tour/Staff Photo/Meet Staff

Lunch Break

Training on EPL communication and culture, intro to circ and intro to reference, questions

## Thursday

**8:30-5 (Annex for curbside followed by annex for processing training with Alyson)**  
[REDACTED]

**10:30-7 Gen and Main training with Darcy until 12, shadowing Emma at Teen from 3-7**  
[REDACTED]

## Friday

**8:30-11:30 Gen for training/followup questions/review from previous days**  
[REDACTED]

**8:30-11: EMOS delivery training with Marlene** [REDACTED]

**12-3:30 On Desk with Darcy/Alyson:** [REDACTED]

**3:30-5:** Followup questions and review/practice

## Saturday

**8:30-3 Annex/Main with Guidance from staff**  
[REDACTED]

**8:30-12 GEN** with Darcy and Debbie: [REDACTED]

**12-3 TEEN** with Darcy and Debbie: [REDACTED]

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# Training Resources

Eckhart Public Library Staff Academy



## Categories

0% Complete

Evergreen Introduction

83% Complete

2. Checkouts, Renewals, and Checkins

45% Complete

3. Library Card Registration and Renewal

50% Complete

Claims Returned, Missing, Lost, Damaged, and Incomplete Items

85% Complete

Computers, Printing, and Faxing

0% Complete

Public Service Desk Collections and Item Handling

83% Complete

Holds and Transits

0% Complete

Receiving and Submitting Interlibrary Loan Requests

0% Complete

Reference Services: Meeting Rooms and Appointments

0% Complete

Searching the Catalog

- All tutorials
- My enrolled tutorials
- Public Service Desks
- Homeless Library Academy
- Working With the Public
- Working With Each Other

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# 30, 60, 90-Day Reviews

- Document successes and areas of concern
  - Open-ended questions
  - Job-specific feedback
  - Manager support
  - Goals
  - Acknowledgement
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# Review Questions

How has working here met or not met your expectations?

What do you like about your position?

Can you identify challenges you have had?

How have you been made to feel part of the team?

What can we provide to help you do your job better?

How can I help you in the future?

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**Think of the last time an employee left your organization.**

**How was it  
communicated to  
staff?**

**How was the  
employee treated?**

**What happened  
with that  
employee's  
knowledge and  
responsibilities?**

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# Offboarding

The process that completes the end of a professional relationship.

Circumstances will be different for each departure.

- Security
  - Knowledge management
  - Retention
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# Offboarding

## Understand the Nature of the Exit

Determines the order and speed of the process

## Communicate Change Quickly

Let the direct team know

## Treat Employees Warmly

Memorable farewell?

Allow them to leave with grace

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# Steps

- Communicate the change
  - Paperwork
  - Transfer knowledge
  - Recover assets
  - Restrict Access
  - Exit Interview
  - Celebrate
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# Exit Interviews

## Right Time, People, and Place

Ideally not the direct supervisor

Keep relaxed atmosphere

## Encourage Open Conversation

Open-ended questions are a guide, but don't let it stifle the conversation

## Use the Knowledge

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# Exit Interviews

In what ways do you believe your work was appreciated and recognized?

Did you feel supported by your manager?

How would you describe your training?

What could be done to make this library a better place to work?

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**Onboarding and offboarding are the bookends of the employee experience.**

1. Both require a significant amount of coordination.
  2. The more structure, the better.
  3. Both are valuable sources of information to help the organization evolve.
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# Questions?

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