Capstone:
Management Onboarding
Best Practices

CPM Cohort 40, Group 3

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Abstract

Many government agencies, whether state, county, or city, do not have a management onboarding plan when hiring staff into a leadership role. This project is to illustrate the current need for new structured management onboarding procedures and suggest some best practices that agencies and municipalities can easily reference that will help incoming management staff to become successful leaders.

To get a clearer understanding of where various agencies were with existing management onboarding, team members distributed a survey to gain in depth knowledge of the current state of management onboarding. Once compiled, AI was employed to help with the analysis. With most of the surveys confirming the underwhelming quality of understanding, resources, tools, and training, the team looked for solutions.

The team reached out to agencies who had reported back with success from their processes to help gain insight into what set their management onboarding process apart from the others. The team also did additional research to determine what industry experts believed should be included in proper management onboarding. This fact gathering procedure has proved vital to the understanding of what is, and is not, working.

With the information gathered, the team put together sample checklists and some recommendations for best practices to enhance management integration within agencies. These recommendations will not only provide needed information for the success of new leadership but will also save agencies money and assist in retaining staff.

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Introduction

As government evolves, leadership and positions change without a structured best practices onboarding plan for those in management. The team met and discussed their experience with management onboarding across state agencies and city departments. The discussion was similar for most of the group, lackluster onboarding of management. Without proper management onboarding, teams, managers, and staff experience frustrations. This can result in not knowing what to do or how to accomplish management work. When managers do not know where to look, this can cause inefficiency and diminished confidence in their staff related to the manager's lack of organization, knowledge, or general help in a timely manner.

There have been attempts in the past by individual agencies/departments to resolve this issue, and some have, but there is no consistency in this process. With this general understanding, the team decided to investigate the current state and what would need to be done to improve the process for onboarding managers. The purpose of this paper is to provide suggestions for a framework that will assist with seamless integration and success for new management through proven onboarding best practices.

History of Onboarding

In the 19th century, onboarding was known as "organizational socialization". This was the American term for new employees to acquire the necessary knowledge, skills, and behaviors to become effective members of a workforce. As the size of companies

grew, so did their need to bring in qualified help that could be efficiently integrated into the workplace culture of the company. Early onboarding was developed primarily for employees of a company and not for upper management.

Many publications between 1930 and 1970 were developed explaining how to socialize new recruits into the organization so that they would be motivated to align their own behaviors with that of their new employers. This progressed into the 1990s when it was commonly known as "onboarding". Since then, upper management of organizations has been provided a process to prepare them for their role, while subordinates will typically only receive new hire orientation.

The onboarding process has continued to grow in the 20th century as more organizations have adopted formal processes to integrate new management into their workplace culture. New models of management onboarding focus more on the long-term relationship between the new hire and the employer that extends well beyond the first few days or weeks of employment, so they are more invested throughout their career in the organization.

As the team discussed their experiences, similarities began to emerge. This conversation directed the team to start the research of best practices for management onboarding.

Research

To validate what many in the team had experienced during their management onboarding process, the team utilized tools that were learned in CPM. A survey was

created and distributed to other managers, an interview of a subject-matter expert was conducted, and educational research on this topic was gathered.

Survey

A seven question survey was created and sent to a number of various agencies and city employees to get an awareness of their onboarding experience. The survey utilized two different question methodologies: qualitative and quantitative. Questions were asked to determine what tools were provided, what types of training had been in place, and where they had identified strengths and gaps in their own internal processes. The survey aimed to gather feedback on onboarding checklists, management training, access to resources, and overall support for new managers. Respondents who indicated they had been provided with useful tools and checklists were then asked to provide samples so we could add that to our conversation.

Summary of Survey

The team asked quantitative questions but also asked for qualitative comments. Questions about onboarding checklists, training provided, necessary resources and tools, and how long it took to be comfortable in their position generated some alarming results. The team also asked qualitative questions consisting of areas you would have liked to receive more information and advice you would give someone starting a new position as a manager. – *See Appendix B - Survey Results for additional information.* Access to a quality checklist scored poorly with only 17% expressing high quality while 83% expressed quality concerns. The same results were produced for management training.

Onboarding Checklist

17.39%

82.61%

■ High Quality   ■ Quality Concerns
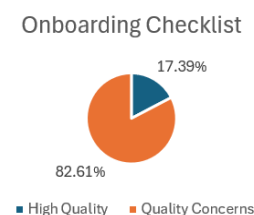
Having available information was not as alarming, but still not impressive. Having almost 60% of existing management indicating that access to resources is limited solidifies that management onboarding best practices are needed across government.
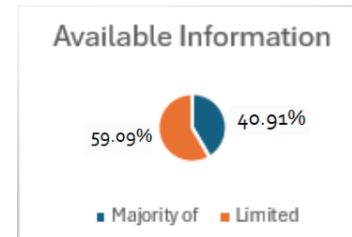
The survey results highlight several areas for improvement in management onboarding best practices. While there are positive aspects, significant gaps in consistency, resource organization, and formal training need to be addressed. Enhancing these processes will better support new employees and managers, contributing to a more effective and cohesive work environment.

Artificial Intelligence Analysis

In the few years leading up to 2024, many advances in generative artificial intelligence (AI), and with large language models (LLMs) in particular, have occurred that allow AI chatbots to be used for answering questions on just about any topic. Another important use case is using AI Chatbots for analyzing and summarizing data of different modalities. With these recent advances, the team chose to utilize AI to assist in the analysis of the survey, providing quick analysis and a summarization of the data. It is also important to note certain options, characteristics, and limitations exist with large language model (LLM) AI chatbots that are noted as follows:

- Free and paid versions of LLM chatbots were available for use. This team used a free version from Microsoft named CoPilot.
- Microsoft CoPilot, and LLMs in general, have a default token length limitation that restricts a single prompt to a certain number of characters. This required a separate prompt be created and submitted for each survey question and associated responses.

- LLMs powering chatbots, such as CoPilot or ChatGPT, are nondeterministic by nature. This means submitting the same prompt multiple times is not guaranteed to give the exact same output. Resubmitting the prompts used in this report did not return any significant differences. Any future reproduction of the results using these prompts is not guaranteed to return the exact same output recorded in this paper.

The results of the generative AI responses provided simple percentage breakdowns of survey data and easy to digest summarization of comments that were provided by respondents as shown in this example.

> **Question 2:** Rate the quality of your onboarding checklist.
> The survey on the quality of the onboarding checklist among 23 respondents revealed that the majority (43.48%) felt it was neither high nor low quality. A significant number found it to be of low quality (21.74%) or very low quality (17.39%), while only 17.39% rated it as high quality, and none considered it very high quality.
>
> From the additional comments, several themes emerge:
>
> - **Improvement Efforts**
> - **Underutilization**
> - **Inconsistency**
> - **Support**
> - **Access Issues**
> - **Lack of Materials**
>
> Overall, the feedback suggests that while there is a foundation for an effective onboarding process, there are significant gaps in consistency, utilization, and provided materials that need to be addressed.

The summarizations were generated by AI (Microsoft CoPilot, Creative Setting, 3/19/2024). *- See Appendix C - AI Generated Survey Analysis.*

Subject-Matter Expert

In furthering our research, the process with one agency stood out due to their comprehensive checklists and how they employed scheduling with the onboarding process. Larry Small, with Iowa's Health and Human Services - Civil Commitment Unit for Sexual Offenders (HHS CCUSO), set up this program, and survey results indicated it was working well and was worth reviewing in more detail. Matthew reached out to Larry for a brief interview.

The interview consisted of four questions. *(see Appendix D - Subject-Matter Expert for the full interview).* To gain a better understanding of why HHS CCUSO built this process, Larry was asked *"why was structured training developed?"* Larry stated *"...*new employees had no idea where they were supposed to be or who they were supposed to be with for instruction." This validated the recurring theme from the team's findings.

To better understand this process, the team wanted to know what all was included and what the rationale was behind those determinations.   The question posed to Larry was, *"How do you determine what is included in this training?"*. "The developer of the training needs to have a very good understanding of what the mission of the company is." Understanding what the new employee needs to be successful at their position is a critical component.   To understand outcomes of the onboarding process that have been put in place, Larry was asked *"How well is the training received?".* Since HHS CCUSO has had great success, it was no surprise to hear that "This was the best Onboarding training I have ever seen, and I worked HR for a very large company!".

After the agency implemented these processes, our team wanted to know "*What are the benefits of this style of training?*" Larry expressed positive outcomes of having such a process in place, "This style of onboarding assists the new employee in defining goals for education and professional development." Small, Larry (2024, March)

Onboarding Research

Having a complete understanding of onboarding is essential for creating best practices. This can range from the cost of onboarding, the difference between onboarding and orientation, and what works for others. We further researched trends, recommendations, and best practices to compare some checklists that are currently in use by our survey takers with what other subject-matter experts were suggesting.   This comparison illustrates important tools and topics that employers should implement to ensure the success of their managers as they step into leadership roles.

Employee cost is critical, not just how much they are paid, but how much it costs to onboard, train, and have the employee fully earning their wage. This also means ensuring their staff is fully functioning with a new manager.

According to new benchmarking data from the Society for Human Resource Management (SHRM), the average cost per hire was nearly $4,700. But many employers estimate the total cost to hire a new employee can be three to four times the position's salary. (Navarra, 2022)

The research also pointed out that many onboarding processes are just employee orientation processes. To have an effective onboarding process, understanding the differences between these is important.

	Employee Orientation	Employee Onboarding
Focus	Role in the Company	Role in the department
Duration	One-time event	Ongoing
Setup	Conference Room	On the Job
Content	Generalized	Build for each manager
Outcome	Ready for training	Ready to contribute

Research shows there are five "C' for management onboarding: Culture, Compliance, Clarification, Connection, and Check Back. Fellow.App (2024) Each key is critical for a successful onboarding. New management needs to immerse themselves in the culture of the agency. This helps new managers understand their employees, understand their manager and mission, and grow as a team together. Compliance will allow the manager to have a basic understanding of policies and procedures, necessary to function as the manager.

Clarification, the third C, is critical as a new manager. This articulates your expectations and goals to your team. Connection is one of the most important C's. Building trust with the team and having them respect you as a leader can ensure your success as a new manager. And lastly, Check Back shows staff that you care about them and ensures that competencies are being achieved. Having scheduled one-on-one meetings, Q&A sessions, and future dated check-ins sustains the trust, respect, and faith in leadership.

Results

Through our research, we found many high points that should be brought together into a formal set of "Best Practices" to be utilized by State of Iowa agencies and local municipalities. Recently, the Department of Management, Division of Information Technology established a new onboarding process that implemented many of these findings when the agency did I.T. consolidation across all agencies.

First, DOM:DoIT had day-long onboarding onsite for every manager in the agency. This meant that new managers and experienced managers all met and attended the same training. This helped to generate Culture, Compliance, Clarification, and Connection amongst the managers. Managers were given expectations and allowed to connect with others doing the same role. This helped build rapport with each other and fostered an environment where it was safe to ask questions.

To help with compliance and clarification, a SharePoint site was created that allowed for easily accessible reference documentation, templates, and checklists. This site has been crucial to the managers as it gives them all the resources they need at their fingertips. They also created a helpdesk page where managers could ask questions at any time, and they would be answered as quickly as possible by leadership.

DOM:DoIT also created the Check Back environment. HR created multiple recurring one-hour sessions to discuss a topic for half of the allotted time meeting and then open questions for the rest. Senior leadership also created numerous recurring meetings specifically to answer questions for the new managers. This was very beneficial as many concerns were addressed immediately, allowing managers to build

trust with the team even amid all the changes.

Based on our findings, utilizing an effective and well thought out Onboarding Checklist is highly recommended for the success of new managers. Ideally, the checklist would be broken down into appropriate tasks in order. There would likely be a section of tasks that must be completed prior to the new manager's arrival. The hiring manager should complete these checklists items to allow for a smooth first day. This would help alleviate concerns of equipment not being ready for the new manager and also help guide new managers on where they need to go upon arrival.

Having a first-day checklist for the new manager to follow allows for a well-planned and organized day. The new manager will know exactly what to expect throughout the day. They will know where to meet in the morning, when to expect a lunch break, and what time they will be wrapping up for the day. Each checklist task has a timeframe, who is responsible for the task, where the meeting is happening and what the objective is for the meeting.

First Day Checklist			
Time	Staff	Location	Objective
8:00-8:30	Hiring Manager	Front desk	Greet new employee upon arrival. Take employee to work location
8:30-9:00	Hiring Manager	Office	Staff introductions
9:00-9:30	Hiring Manager	Office	Guided tour of facility
9:30-10:30	Staff	Desk	Computer work – get user signed into computer and a high-level overview of the systems
10:30-12:00	HR	Desk	Filling out of HR forms, benefits, payroll, handbook, workday overview.
12:00-13:00	Lunch		
Time	Staff	Location	Objective
13:00-13:30	Hiring Manager	Manager's Office	Discuss job description, processes, expectations, and open time for questions by new employee
13:30-14:30	Leadership	Leadership's office	Meet with senior leadership with manager attending
14:30-15:30	Staff	Desk	Setup email – signature, calendar, shared drives, etc
15:30-16:00	New Manager	Desk	Get settled
16:00-16:30	Hiring Manager	Manager's Office	Recap of the day and prep for tomorrow

Another checklist will be provided for the first week of work. This checklist will have the same format, excluding exact timeframe, of what needs to be done.

		First week Checklist
Task	Staff	Objective
1:1's	New Manager	Schedule one-on-one meetings with your staff
Weekly meeting	New Manager	Schedule weekly team meetings
Badge	New Manager	Get badge access
Time Reporting	New Manager	Complete time reporting training in workday
Helpdesk	New Manager	Attend helpdesk training by staff
Forms	New Manager	Return all necessary employment forms to Human Resources Associate not filled out on the first day.
IPPE	New Manager	Sign performance plan
Sites	New Manager	Explore websites dedicated to management/onboarding
HR Meetings	HR	Schedule ongoing HR training
Application training	New Manager	Schedule recurring meetings to review systems
Site Visits	Hiring Manager	Take new employee to complex locations they may need to have meetings at
Nightly Recap	Hiring Manager	Spend 15-30 minutes before shift ends to review how the day went

The last set of checklist tasks will be in 30-, 60-, and 90-day timeframes.

90 Day Checklist Tasks		
Weekly managers meeting 30 days	Bi-weekly 30-60 days	90 day review
Review Checklist to ensure current	Review documents to ensure current	

During the 30-90-day timeframe, managers should continue to review the checklists and documents and provide any recommended changes to senior management, ensuring the checklist is current.

Conclusion

The onboarding process for public managers in government is a critical, yet often neglected, aspect of organizational success. These managers are tasked with navigating the complex terrain of public policy implementation, a responsibility that demands not only adherence to established protocols but also the ability to interpret and adapt those policies to serve the public effectively. However, the current landscape reveals a troubling inconsistency in onboarding practices across state, county, and city agencies. Many new managers find themselves entering their roles without the structured guidance necessary for success, leading to confusion and frustration.

As public managers assume their leadership roles, they face the dual challenge of interpreting often vague directives while simultaneously fulfilling the intent of those policies. The lack of a standardized onboarding process means that many are left to rely on their personal experiences, which can vary significantly from one agency to another.

Some new managers benefit from comprehensive training programs, while others are met with little more than a brief introduction to their team and workspace.

This disparity not only hampers the effectiveness of individual managers but also undermines the broader organizational goals of transparency, accountability, and service excellence. In a role where effective leadership is paramount, inadequate onboarding can result in diminished staff morale and increased turnover—issues that ultimately impact the public good.

To address these challenges, it is imperative that government agencies adopt a cohesive framework for onboarding new managers. This framework should prioritize an onboarding checklist that addresses knowledge transfer, structured training, and accessible resources to ensure that leaders are equipped to navigate the complexities of their roles. Engaging with experienced professionals and incorporating best practices from successful agencies can provide invaluable insights, fostering a more informed and prepared management team.

In conclusion, the onboarding of public managers requires careful consideration and a commitment to best practices that promote effective leadership. By establishing structured onboarding processes, agencies can enhance the integration of new leaders, ultimately benefiting the public they serve. As public managers strive to balance the implementation of policies with the well-being of citizens, a robust onboarding strategy will be essential in fostering a culture of transparency, accountability, and responsiveness.

References

Fellow.App. (2024, September 16). *New Manager Onboarding Checklist: The 5 C's*. Fellow.app. https://fellow.app/blog/management/new-manager-onboarding-checklist/

SurveyMonkey (2024, March 19), <u>CPM40 Survey - Responses | SurveyMonkey</u>

Small, Larry (2024, March). Training Specialist 1, Iowa HHS - CCUSO (Mathew Boothby, Interviewer)

(2022, April 11). *The Real Costs of Recruitment*. SHRM. Retrieved April 8, 2024, from https://www.shrm.org/topics-tools/news/talent-acquisition/real-costs-recruitment

Appendix A - Deficient Manager Onboarding Checklist

Tasks to Complete before New Employee's First Day: IT request for user registration and computer equipment Contact new employee with information for the first day (parking, dress code, lunch, etc.) Send hire announcement email to appropriate office(s)/section(s)

Tasks to Complete on New Employee's First Day in the office (Supervisor will receive a to do task in their Workday inbox with the below tasks): Greet new employee upon arrival Show new employee his/her work location

Show new employee location of supervisor's office

Introduce new employee to team members

Tour work area (include the following):

a. Vending machines/break rooms

b. Coffee/water cooler/refrigerator/microwaves

c. Restrooms

d. Coat area

e. Conference rooms

f. Sign-out board (if applicable)

g. Office supply area

Explain phone system and use (voicemail, call forwarding, etc.) Provide Help Desk contact information (Now tab on OKTA) Have New Employee complete all onboarding tasks in Workday

Discuss any employee questions and read the Employee Handbook – New Hire will sign off on the Handbook Acknowledgement in Workday

Explain Job Description and specific processes Discuss the Employee Performance Evaluation Explain department systems and policies EG: Clerks Manual, Confidentiality, etc. Provide new hire with a mentor and discuss training process Tasks to Complete in New Employee's First Week: Show new hire Workday Smart Guides Tab on OKTA

Explain the following Workday functions:

a. a. Timesheets and absence calendar -- Discuss work hours and breaks. Discuss procedure to follow when absent or late. If hourly- the employee will need to manually enter their timecard each day. If salary- the employee will not need to manually enter their timecard only time off.

b. Process for requesting time off or leave -- The supervisor will want to go over timecodes and Telework/Flex policy

c. Pay Slip Information

d. Expense Reports process and related policies Discuss SharePoint and Quick Links Discuss Orientation Dates/Location

Discuss work safety/security/emergency procedures

a. Ergonomics

b. Computer

c. Take picture for ID Badge

d. Put Fillable Emergency Care information in an envelope to keep in an emergency contact binder

e. Discuss Worker Comp Process/Forms

Tasks to Complete in that are in Workday on the First Day: Complete the I9 process in Workday – You will copy the I9 required documents and upload them into the I9 business process. **Make sure the new employee first and last name is the same as it is on the social security card**

Tasks to Complete in that are not in Workday: Send HR the following items that are not in Workday:

a. Sign and dated Job Description

b. Sign and dated Performance Goals

Provide the New Hire with Contact

Appendix B - Survey Results

Question 2 Prompt:
The following survey question was asked of 23 respondents: "Rate the quality of your onboarding checklist". The following were their responses:

Very high quality - 0.00%

High quality - 17.39%

Neither high nor low quality - 43.48%

Low quality - 21.74%

Very low quality - 17.39%

The respondents provided these additional comments:

We are working on improving due to forecast changes in staffing - 2/9/2024 04:02 PM

I would say our checklist is fairly strong, but I don't feel that managers are utilizing it to its potential, so I'm rating it lower. - 2/8/2024 05:36 PM

We are working on updating all of our checklists. It is OK but has room for improvement. - 2/8/2024 04:17 PM

benefits on boarding is good. job on boarding is ad hoc - 2/6/2024 09:23 AM

No formal checklist, learning informal from peers - 2/6/2024 07:46 AM

There was no onboarding information provided beyond signing up for benefits. - 2/6/2024 07:44 AM

Lots of information presented - 2/5/2024 09:02 AM

No checklists were available but supervisors were there for assistance. - 2/5/2024 08:24 AM

The procedural checklist for managers is okay but I feel like the onboarding process and how managers create a consistently great experience for new hires joining the organization is below average. - 2/5/2024 08:11 AM

I would rate my onboarding as a 3. I did not get any materials or specific training, but I was supported through access to my supervisor, historic bureau materials, and relatively experienced staff. I also received support and positive partnership from partners in other divisions. - 2/2/2024 10:01 AM

Very basic checklist and often no computer access or application access due to the speed of DAS approvals after hiring submittals or speed of internal HR processes - 2/1/2024 03:22 PM

I have never seen an onboarding checklist EVER at HHS - 2/1/2024 02:11 PM

My onboarding was not good. - 2/1/2024 02:10 PM

Question 3 Prompt:

The following survey question was asked of 23 respondents: "Rate the Management training provided when you started". The following were their responses:

Very high quality - 4.35%

High quality - 13.04%

Neither high nor low quality - 21.74%

Low quality - 39.13%

Very low quality - 21.74%

The respondents provided these additional comments:

I was "indoctrinated" 30+ years ago, so it was more learn as you go. - 2/9/2024 04:02 PM

We did not have a training plan when I came out to my current agency. We have since put into place a training plan for both new employees and management as well. - 2/8/2024 04:17 PM

i was a manager for 4 yrs before i got my first training course. - 2/6/2024 09:23 AM

Basically a couple of Share drives were shared with a few documents that descriptions of codes and how to deal with coding on HRIS (Payroll) for staff and a little detail on Cost Centers which I was already familiar with. My formal boss who became my peer gave me a couple 15 minute sessions about how to play certain political situations. I learned more when I took a list of items I needed advice or awareness on to my new boss (CIO at the time) and then we went through it together. This was over the next 6 months. - 2/6/2024 07:55 AM

Rating higher because of Drake CPM training, but this is not exclusively for managers nor offered to all managers in our organization - 2/6/2024 07:46 AM

No management training provided. No one showed how to use any of the management tools for staff time tracking, leave requests and performance evaluations. - 2/6/2024 07:44 AM

No real orientation. Access to my superior was limited. - 2/5/2024 03:57 PM

I have only been provided the PDS courses- which sometimes aren't very helpful - 2/5/2024 09:23 AM

Again, lots of information provided in a one hour meeting. - 2/5/2024 09:02 AM

Supervisors were helpful in all aspects. - 2/5/2024 08:24 AM

Not much to speak of here outside of the required PDS courses. - 2/5/2024 08:11 AM

With several new people, onboarding was pretty much non-existent. My direct manager attempted to provide as much detail as possible, but it was not in a repeatable/standard process - 2/2/2024 10:51 AM

Pretty much learned on my own, ask questions - 2/2/2024 10:45 AM

Friendly, informative, professional - 2/2/2024 10:44 AM

I would rate my management training as a 1. I did not receive any management training and wasn't aware that there were DAS management resources until I was two years into my job. It would be nice to have a standard management training plan to be completed in the first six months of being a new manager. - 2/2/2024 10:01 AM

My current position is one in which you must learn as you go and ask questions when necessary. As a whole at HHS, very little trg. - 2/1/2024 02:11 PM

I had no management training provided to me. - 2/1/2024 02:10 PM

There was very little management training outside of the DAS courses. Additional training and peer support would have been helpful as a new manager. - 2/1/2024 02:08 PM

Question 4 Prompt
The following survey question was asked of 22 respondents: "Rate the access to necessary resources and tools during the onboarding process". The following were their responses:

None - 0.00%

Limited - 59.09%

Majority - 40.91%

The respondents provided these additional comments:

Today, we have much better access to resources. - 2/9/2024 04:02 PM

I am not 100% sure what this question is asking. We have the new employee sit with our HR during the onboarding process and assist our new employees as they navigate Workday through onboarding. - 2/8/2024 04:17 PM

material is available but not organized well - 2/6/2024 09:23 AM

Access was granted to systems but not instructions or guidelines provided. - 2/6/2024 07:44 AM

It would be helpful if we were communicated with on where the tools we need are located - 2/5/2024 09:23 AM

All of the previous supervisors information was available for use. I just had to use it in a way I thought was appropriate. - 2/5/2024 08:24 AM

IMO there are plenty of tools and resources available but they are all separate and in many different places - 2/5/2024 08:11 AM

Hierarchy and workflows were not explained. - 2/2/2024 10:51 AM

no problems with access to anything required - 2/2/2024 10:44 AM

I think it is challenging to know where to find resources as my experience has been that it is word of mouth. - 2/2/2024 10:01 AM

The resource I had access to were team members who could educate me. I would consider them "necessary" but insufficient. Limited. - 2/1/2024 02:10 PM

This was partially a challenge because of the merger, managing between competing legacy agencies and knowing who to ask for assistance. - 2/1/2024 02:08 PM

Question 5 Prompts
The following survey question was asked of 22 respondents: "Tell us what areas you would have liked to receive more information". The following were their responses:

None - 0.00%

Limited - 59.09%

Majority - 40.91%

The respondents provided these additional comments:

Today, we have much better access to resources. - 2/9/2024 04:02 PM

I am not 100% sure what this question is asking. We have the new employee sit with our HR during the onboarding process and assist our new employees as they navigate Workday through onboarding. - 2/8/2024 04:17 PM

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The resource I had access to were team members who could educate me. I would consider them "necessary" but insufficient. Limited. - 2/1/2024 02:10 PM

This was partially a challenge because of the merger, managing between competing legacy agencies and knowing who to ask for assistance. - 2/1/2024 02:08 PM

Question 6 Prompt
The following survey question was asked of 23 respondents: "How many months did it take you to feel comfortable in your new position?". The following were their responses:

Less that 3 - 13.04%

3-6 months - 21.74%

7-12 months - 43.48%

More than 12 months - 21.74%

Question 7 Prompt (4000-character prompt limit reached)
The following survey question was asked of 22 respondents: "As an existing manager, what advice would you give someone starting a new position as a manager?". The following were their responses:

Be thoughtful, caring, open minded. Listen. Follow through.

Be curious. Read, research, and rely on HR and other managers/mentors. Have the conversations.

I do not feel like state employees at any level are properly trained in all processes. I think that guidance I would give a new manager is to ask questions. There are resources that are sporadically placed, but not a good one stop shop for information. There are memos that are sent that are not documented anywhere else. This has become a bigger issue with Workday. The guides available do not always reflect what has been stated in training. Making sure training and guides are updated to match is very important. Having some peers to reach out to is very helpful. It was an easier transition for me coming from being a payroll manager because I had connections in a lot of state agencies I could reach out to. Most incoming managers do not have that same support system.

your job is to provide your staff the tools they need to make them successful.

Get to know the team that you manage. Enable them to do their jobs. Be available for them and also be willing to sponsor and endorse the work they do. In areas of weakness, find ways to build up your staff members; if that is not possible for someone, find a role that is more suited for their skills, expertise and title (if possible).

Wow loaded question. Don't try to please everyone. Look for areas of compromise where there are conflicts and work towards win-win situations. These are not always going to be there, so sometimes the wins might be perceived as less on your side but may give you credit to be used later. When supervising new managers, make sure they leave their pride at the door. In our environment, a lot of times to achieve goals is trying to get consensus with all parties for a mutual goal. Pride can get in the way and come across as a defensiveness. Admit when at fault as this build trust on the business side with your area, they learn to trust you that you're going to research the right answer and get back to them instead of making up answers on the fly. Also remembering when people are short in answers does not mean they are attacking you but may just be short on time. Email/chat are very hard to interpret tone. Make sure direct staff feel empowered to make decisions, and work towards getting that empowerment from your boss. Managers are hired to make decisions and take appropriate risk, if this doesn't happen then what are we doing? So in the end with empowerment dont micro manage your staff build them and let them feel comfortable in their space to make decisions. When question are brought to you its very easy just give quick answers, but if you take a little more time and ask "What would you do" and then they give a reasonable answer, they'll be more inclined to make the decision themselves before coming to you.

Seek out guidance and ask for weekly touch bases to go through items. Request there to be a checklist of the systems and procedures managers should know of.

Seek out relationships with HR. HR is a resource that is crucial to being an effective manager. Seek out relationships with other senior leaders.

Don't be afraid to ask questions and use the resources available.

Ask a lot of questions- sometimes current managers have been managers for so long, it is hard for them to put themselves in the shoes of a new manager.

Ask questions

To be confident in your abilities and to adapt to situations.

Be diligent about keep records and listening to the needs of staff.

Keep asking questions & lean on others in your team and enterprise to help

Take time with your hires to provide resources and remove roadblocks. Even the smallest details on how to navigate state bureaucracy is beneficial.

Appendix C - AI Generated Survey Analysis

Introduction

A survey was sent to State and City employees in managers/supervisors in positions asking questions regarding onboarding and training quality. The results can be found here [CPM40 Survey - Responses | SurveyMonkey](#) . This document will summarize the response and comments for each of these questions. Summarizations were generated by AI (Microsoft CoPilot, Creative Setting, 3/19/2024).

Summarized Responses/Comments

Question 1: Name

Question 2: Rate the quality of your onboarding checklist.

The survey on the quality of the onboarding checklist among 23 respondents revealed that the majority (43.48%) felt it was neither high nor low quality. A significant number found it to be of low quality (21.74%) or very low quality (17.39%), while only 17.39% rated it as high quality, and none considered it very high quality.

From the additional comments, several themes emerge:

- **Improvement Efforts**: Respondents acknowledge ongoing efforts to improve the checklists due to changes in staffing and the need for updates.

- **Underutilization**: There's a sentiment that the checklists, while potentially useful, are not being fully utilized by managers.

- **Inconsistency**: The onboarding process is seen as inconsistent, with some respondents noting a lack of formal checklists and reliance on informal learning from peers.

- **Support**: Despite the shortcomings, some respondents appreciated the support from supervisors and experienced staff.

- **Access Issues**: Challenges with access to computers, applications, and slow internal processes were highlighted as areas needing attention.

- **Lack of Materials**: A few respondents indicated that they received no onboarding materials or formal training, relying instead on ad hoc support.

Overall, the feedback suggests that while there is a foundation for an effective onboarding process, there are significant gaps in consistency, utilization, and material provision that need to be addressed.

Question 3: Rate the Management training provided when you started.

The survey responses and comments indicate a general dissatisfaction with the management training provided. Here's a summary:

Survey Results:

- **Very high quality:** 4.35%

- **High quality:** 13.04%

- **Neither high nor low quality:** 21.74%

- **Low quality:** 39.13%

- **Very low quality:** 21.74%

Key Points from Comments:

- A significant number of respondents felt they had to **learn as they go**, indicating a lack of structured training.

- Some mentioned the absence of a **training plan** or **orientation** when they started, though it seems efforts have been made to implement these since.

- **Formal training sessions** were rare or non-existent for some, with one respondent waiting four years for their first course.

- **Informal learning**, such as advice from peers or superiors, was more common, though this was not standardized or formalized.

- **PDS courses** were provided to some, but their usefulness was questioned.

- There was a desire for a **standard management training plan** to be completed within the first six months of becoming a manager.

Overall, the feedback suggests a need for more comprehensive, formalized management training and better onboarding processes to support new managers.

Question 4: Rate the access to necessary resources and tools during the onboarding process.
The survey responses and comments indicate that while none of the 22 respondents felt they had no access to necessary resources and tools during the onboarding process, a majority reported limited access. Here's a summary:

- **Limited Access (59.09%)**: Many respondents found the resources available but not well organized, with no clear instructions or guidelines on how to use them. There was a sentiment that resources are scattered and not centralized, making it challenging to locate them. The lack of communication about where to find tools and the absence of explained workflows and hierarchies were also noted as issues.

- **Majority Access (40.91%)**: Some respondents had better experiences, mentioning that they had access to all previous supervisors' information or that they could rely on team members for education, though this was deemed insufficient. One respondent noted no problems with access.

Additional Comments:

- Respondents expressed a need for better organization and communication regarding the availability and location of resources.

- The merger between legacy agencies was mentioned as a complicating factor in managing resources.

- The comments suggest a desire for a more integrated and user-friendly system to navigate the onboarding process effectively.

Overall, the feedback points to a need for improvement in the organization and accessibility of onboarding resources to ensure new employees feel fully supported.

Question 5: Tell us what areas you would have liked to receive more information. The survey results indicate that while no respondents felt completely uninformed, a significant majority expressed a need for more information. Here's a summary:

Survey Results:

- **59.09%** of respondents felt they received **limited** information.

- **40.91%** felt they received the **majority** of the information they needed.

Key Insights from Comments:

- **Resource Accessibility:** Respondents noted better access to resources today, but also mentioned challenges in locating and utilizing them effectively.

- **Clarity and Organization:** There is a perceived lack of clear instructions and guidelines, with materials being available but not well-organized.

- **Communication:** A need for better communication was highlighted, specifically regarding the availability and location of necessary tools.

- **Onboarding Process:** The onboarding process involves HR assistance, but there's uncertainty about the survey question's intent.

- **Use of Existing Information:** Some respondents were able to access previous supervisors' information, yet found it challenging to apply it appropriately.

- **System Access:** While access to systems was granted, instructions were not always provided.

- **Knowledge Sharing:** The reliance on team members for education was deemed necessary but not sufficient, indicating a gap in formal resource provision.

- **Merger Challenges:** The recent merger posed difficulties in navigating between legacy agencies and identifying the right contacts for help.

Overall, the feedback suggests a need for improved organization, communication, and guidance regarding the resources and support available to employees.

Question 6: How many months did it take you to feel comfortable in your new position? The survey responses indicate that the majority of respondents, **43.48%**, felt comfortable in their new position within **7-12 months**. A significant number, **21.74%**, felt comfortable in **3-6 months** and another **21.74%** took **more than 12 months**. The smallest group, **13.04%**, felt comfortable in **less than 3 months**. In summary, it seems that for most people, it takes more than half a year to feel comfortable in a new job role.

Question 7: As an existing manager, what advice would you give someone starting a new position as a manager?
The advice from existing managers to new managers can be summarized into several key themes:

- **Empathy and Openness**: Be thoughtful, caring, and open-minded. Listen to your team and follow through on commitments.

- **Curiosity and Learning**: Stay curious, read, research, and rely on HR and other managers for guidance. Engage in conversations and ask questions.

- **Resource Utilization**: Recognize that resources may be scattered and ensure training and guides are updated. Reach out to peers for support.

- **Empowerment**: Provide your staff with the tools they need for success. Empower them to make decisions and avoid micromanagement.

- **Team Building**: Get to know your team, enable them to do their jobs, and endorse their work. Address areas of weakness constructively.

- **Conflict Management**: Don't try to please everyone; instead, seek compromise and work towards win-win situations.

- **Self-Awareness**: Leave pride at the door, admit faults to build trust, and be aware of communication challenges in email/chat.

- **Guidance Seeking**: Seek out guidance, establish regular check-ins, and build relationships with HR and senior leaders.

- **Confidence and Adaptability**: Be confident in your abilities and adapt to different situations.

- **Record Keeping**: Be diligent about keeping records and attentive to the needs of staff.

- **Supportive Environment**: Lean on others in your team and enterprise for help, and take time to provide resources and remove roadblocks for your hires.

These insights reflect a blend of personal qualities and practical strategies for effective management.

Generative AI Prompts
Question 2 Prompt:
The following survey question was asked of 23 respondents: "Rate the quality of your onboarding checklist". The following were their responses:

Very high quality - 0.00%

High quality - 17.39%

Neither high nor low quality - 43.48%

Low quality - 21.74%

Very low quality - 17.39%

The respondents provided these additional comments:

We are working on improving due to forecast changes in staffing. - 2/9/2024 04:02 PM

I would say our checklist is fairly strong, but I don't feel that managers are utilizing it to its potential, so I'm rating it lower. - 2/8/2024 05:36 PM

We are working on updating all of our checklists. It is OK but has room for improvement. - 2/8/2024 04:17 PM

benefits on boarding is good. job on boarding is ad hoc - 2/6/2024 09:23 AM

No formal checklist, learning informal from peers - 2/6/2024 07:46 AM

There was no onboarding information provided beyond signing up for benefits. . - 2/6/2024 07:44 AM

Lots of information presented - 2/5/2024 09:02 AM

No checklists were available but supervisors were there for assistance. - 2/5/2024 08:24 AM

The procedural checklist for managers is okay but I feel like the onboarding process and how managers create a consistently great experience for new hires joining the organization is below average. - 2/5/2024 08:11 AM

I would rate my onboarding as a 3. I did not get any materials or specific training, but I was supported through access to my supervisor, historic bureau materials, and relatively experienced staff. I also received support and positive partnership from partners in other divisions. - 2/2/2024 10:01 AM

Very basic checklist and often no computer access or application access due to the speed of DAS approvals after hiring submittals or speed of internal HR processes - 2/1/2024 03:22 PM

I have never seen an onboarding checklist EVER at HHS - 2/1/2024 02:11 PM

My onboarding was not good. - 2/1/2024 02:10 PM

Question 3 Prompt:
The following survey question was asked of 23 respondents: "Rate the Management training provided when you started". The following were their responses:

Very high quality - 4.35%

High quality - 13.04%

Neither high nor low quality - 21.74%

Low quality - 39.13%

Very low quality - 21.74%

The respondents provided these additional comments:

I was "indoctrinated" 30+ years ago, so it was more learn as you go. - 2/9/2024 04:02 PM

We did not have a training plan when I came out to my current agency. We have since put into place a training plan for both new employees and management as well. - 2/8/2024 04:17 PM

i was a manager for 4 yrs before i got my first training course. - 2/6/2024 09:23 AM

Basically a couple of Share drives were shared with a few documents that descriptions of codes and how to deal with coding on HRIS (Payroll) for staff and a little detail on Cost Centers which I was already familiar with. My formal boss who became my peer gave me a couple 15 minute sessions about how to play certain political situations. I learned more when I took a list of items I needed advice or awareness on to my new boss (CIO at the time) and then we went through it together. This was over the next 6 months. - 2/6/2024 07:55 AM

Rating higher because of Drake CPM training, but this is not exclusively for managers nor offered to all managers in our organization - 2/6/2024 07:46 AM

No management training provided. No one showed how to use any of the management tools for staff time tracking, leave requests and performance evaluations. - 2/6/2024 07:44 AM

No real orientation. Access to my superior was limited. - 2/5/2024 03:57 PM

I have only been provided the PDS courses- which sometimes aren't very helpful - 2/5/2024 09:23 AM

Again, lots of information provided in a one hour meeting. - 2/5/2024 09:02 AM

Supervisors were helpful in all aspects. - 2/5/2024 08:24 AM

Not much to speak of here outside of the required PDS courses. - 2/5/2024 08:11 AM

With several new people, onboarding was pretty much non-existent. My direct manager attempted to provide as much detail as possible, but it was not in a repeatable/standard process - 2/2/2024 10:51 AM

Pretty much learned on my own, ask questions - 2/2/2024 10:45 AM

Friendly, informative, professional - 2/2/2024 10:44 AM

I would rate my management training as a 1. I did not receive any management training and wasn't aware that there were DAS management resources until I was two years into my job. It would be nice to have a standard management training plan to be completed in the first six months of being a new manager. - 2/2/2024 10:01 AM

My current position is one in which you must learn as you go and ask questions when necessary. As a whole at HHS, very little trg. - 2/1/2024 02:11 PM

I had no management training provided to me. - 2/1/2024 02:10 PM

There was very little management training outside of the DAS courses. Additional training and peer support would have been helpful as a new manager. - 2/1/2024 02:08 PM

Question 4 Prompt:
The following survey question was asked of 22 respondents: "Rate the access to necessary resources and tools during the onboarding process". The following were their responses:

None - 0.00%

Limited - 59.09%

Majority - 40.91%

The respondents provided these additional comments:

Today, we have much better access to resources. - 2/9/2024 04:02 PM

I am not 100% sure what this question is asking. We have the new employee sit with our HR during the onboarding process and assist our new employees as they navigate Workday through onboarding. - 2/8/2024 04:17 PM

material is available but not organized well - 2/6/2024 09:23 AM

Access was granted to systems but not instructions or guidelines provided. - 2/6/2024 07:44 AM

It would be helpful if we were communicated with on where the tools we need are located - 2/5/2024 09:23 AM

All of the previous supervisors information was available for use. I just had to use it in a way I thought was appropriate. - 2/5/2024 08:24 AM

IMO there are plenty of tools and resources available but they are all separate and in many different places - 2/5/2024 08:11 AM

Hierarchy and workflows were not explained. - 2/2/2024 10:51 AM

no problems with access to anything required - 2/2/2024 10:44 AM

I think it is challenging to know where to find resources as my experience has been that it is word of mouth. - 2/2/2024 10:01 AM

The resource I had access to were team members who could educate me. I would consider them "necessary" but insufficient. Limited. - 2/1/2024 02:10 PM

This was partially a challenge because of the merger, managing between competing legacy agencies and knowing who to ask for assistance. - 2/1/2024 02:08 PM

Question 5 Prompt:
The following survey question was asked of 22 respondents: "Tell us what areas you would have liked to receive more information". The following were their responses:

None - 0.00%

Limited - 59.09%

Majority - 40.91%

The respondents provided these additional comments:

Today, we have much better access to resources. - 2/9/2024 04:02 PM

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This was partially a challenge because of the merger, managing between competing legacy agencies and knowing who to ask for assistance. - 2/1/2024 02:08 PM

Question 6 Prompt:
The following survey question was asked of 23 respondents: "How many months did it take you to feel comfortable in your new position?". The following were their responses:

Less that 3 - 13.04%

3-6 months - 21.74%

7-12 months - 43.48%

More than 12 months - 21.74%

Question 7 Prompt: (4000-character prompt limit reached)
The following survey question was asked of 22 respondents: "As an existing manager, what advice would you give someone starting a new position as a manager?". The following were their responses:

Be thoughtful, caring, open minded. Listen. Follow through.

Be curious. Read, research, and rely on HR and other managers/mentors. Have the conversations.

I do not feel like state employees at any level are properly trained in all processes. I think that guidance I would give a new manager is to ask questions. There are resources that are sporadically placed, but not a good one stop shop for information. There are memos that are sent that are not documented anywhere else. This has become a bigger issue with Workday. The guides available do not always reflect what has been stated in training. Making sure training and guides are updated to match is very important. Having some peers to reach out to is very helpful. It was an easier transition for me coming from being a payroll manager because I had connections in a lot of state agencies I could reach out to. Most incoming managers do not have that same support system.

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weakness, find ways to build up your staff members; if that is not possible for someone, find a role that is more suited for their skills, expertise and title (if possible).

Wow loaded question. Don't try to please everyone. Look for areas of compromise where there are conflicts and work towards win-win situations. These are not always going to be there, so sometimes the wins might be perceived as less on your side but may give you credit to be used later. When supervising new managers, make sure they leave their pride at the door. In our environment, a lot of times to achieve goals is trying to get consensus with all parties for a mutual goal. Pride can get in the way and come across as a defensiveness. Admit when at fault as this build trust on the business side with your area, they learn to trust you that you're going to research the right answer and get back to them instead of making up answers on the fly. Also remembering when people are short in answers does not mean they are attacking you but may just be short on time. Email/chat are very hard to interpret tone. Make sure direct staff feel empowered to make decisions, and work towards getting that empowerment from your boss. Managers are hired to make decisions and take appropriate risk, if this doesn't happen then what are we doing? So in the end with empowerment dont micro manage your staff build them and let them feel comfortable in their space to make decisions. When question are brought to you its very easy just give quick answers, but if you take a little more time and ask "What would you do" and then they give a reasonable answer, they'll be more inclined to make the decision themselves before coming to you.

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Seek out relationships with HR. HR is a resource that is crucial to being an effective manager. Seek out relationships with other senior leaders.

Don't be afraid to ask questions and use the resources available.

Ask a lot of questions- sometimes current managers have been managers for so long, it is hard for them to put themselves in the shoes of a new manager.

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To be confident in your abilities and to adapt to situations.

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Keep asking questions & lean on others in your team and enterprise to help

Take time with your hires to provide resources and remove roadblocks. Even the smallest details on how to navigate state bureaucracy is beneficial.

Appendix D - Subject-Matter Expert Interview

Larry Small - Training Specialist 1 - Iowa HHS - CCUSO

1. *Why was structured training developed?*
    The previous onboarding training consisted of multiple staff members providing training, and that training had little organization. New employees were shuffled between various rooms and handed off to different staff members. Often, the new employee had no idea where they were supposed to be or who they were supposed to be with for instruction. Often, the new employee was directed to read policy and the assigned staff would leave the area. Structured onboarding training gives the facility/company a systematic approach to achieve a detailed daily schedule to provide time frames and outlines for the training assignments for the onboarding period. Structured onboarding with a timeline is the pinnacle of superior training.

2. *What are the benefits of this style of training?*
    This style of onboarding assists the new employee in defining goals for education and professional development. Later during the OJT portion of onboarding, the new employee has the history of why a task is performed a certain way, and with that prior knowledge, is better able to quickly repeat the task during the hands-on or in-person demonstrations of tasks.

3. *How do you determine what is included in this training?*
    The developer of the training needs to have a very good understanding of what the mission of the company is. The developer needs to review company policies, handbooks, and other relevant documents to develop the training to be delivered and develop a schedule for delivery. While some trainings are mandatory, other trainings will help the new employee understand the relevance of the need for that training. The developer looks for guidance from supervisors and management, using past experiences of their own performance of tasks as well as those experiences of the supervisors/managers.

4. *How well is the training received?*
    The New Employees have given feedback ranging from "You taught me a lot, and I feel more relaxed going into this environment" to "This was the best Onboarding training I have ever seen, and I worked HR for a very large company!" This Training Specialist has not received any negative feedback for the delivery of the onboarding training.

Appendix E - Manager Onboarding

Checklist Best Practices

Pre-onboarding Tasks	Staff	Objective
New employee IT request	Hiring Manager	Request for user registration and computer equipment
First Day info	Hiring Manager	First Day info – parking, dress code, lunch, etc.
Announcement	Hiring Manager	Send announcement to appropriate office(s)/section(s)
Meet/Greet	Hiring Manager	Schedule meetings with leadership and staff

First Day Checklist			
Time	Staff	Location	Objective
8:00-8:30	Hiring Manager	Front desk	Greet new employee upon arrival. Take employee to work location
8:30-9:00	Hiring Manager	Office	Staff introductions
9:00-9:30	Hiring Manager	Office	Guided tour of facility
9:30-10:30	Staff	Desk	Computer work – get user signed into computer and a high-level overview of the systems
10:30-12:00	HR	Desk	Filling out of HR forms, benefits, payroll, handbook, workday overview.
12:00-13:00	Lunch		
Time	Staff	Location	Objective
13:00-13:30	Hiring Manager	Manager's Office	Discuss job description, processes, expectations, and open time for questions by new employee
13:30-14:30	Leadership	Leadership's office	Meet with senior leadership with manager attending
14:30-15:30	Staff	Desk	Setup email – signature, calendar, shared drives, etc
15:30-16:00	New Manager	Desk	Get settled
16:00-16:30	Hiring Manager	Manager's Office	Recap of the day and prep for tomorrow

First week Checklist		
Task	Staff	Objective
1:1's	New Manager	Schedule one-on-one meetings with your staff
Weekly meeting	New Manager	Schedule weekly team meetings
Badge	New Manager	Get badge access
Time Reporting	New Manager	Complete time reporting training in workday
Helpdesk	New Manager	Attend helpdesk training by staff
Forms	New Manager	Return all necessary employment forms to Human Resources Associate not filled out on the first day.
IPPE	New Manager	Sign performance plan
Sites	New Manager	Explore websites dedicated to management/onboarding
HR Meetings	HR	Schedule ongoing HR training
Application training	New Manager	Schedule recurring meetings to review systems
Site Visits	Hiring Manager	Take new employee to complex locations they may need to have meetings at
Nightly Recap	Hiring Manager	Spend 15-30 minutes before shift ends to review how the day went

90 Day Checklist Tasks		
Weekly managers meeting 30 days	Bi-weekly 30-60 days	90 day review
Review Checklist to ensure current	Review documents to ensure current	