

| | | |
|-----------------------|---------------|----------------------------------|
| New Hire: | Joe Sample | EMPLOYEE/MINISTER ORIENTATION |
| Hiring Manager: | Jane Example | |
| Center Administrator: | Sarah Example | |

ABOUT ORIENTATION

Orientation involves welcoming a new Minister or employee and familiarizing them with the organization. It often includes meetings with supervisors and Ministry leaders, introductions to staff and coworkers, information about the Ministry's background, mission, goals, and culture, and learning policies, standards, and practices. It may also involve enrolling the employee in benefits and incentive programs or providing enrollment information.

ORIENTATION SNAPSHOT

Only happens once for new hires.
Takes place before or during the employee's first days of work.
Informs new hires about Ministry operations, policies, and procedures.
The same information is presented to everyone, regardless of role or skill level.

ORIENTATION: GOALS AND OUTCOMES

Employees are familiarized with the organization's history, culture, policies, standards, mission, goals, and day-to-day processes.
New hire paperwork is completed.
Employees are informed or enrolled in benefits if applicable
Employees are given access to proprietary accounts, email, networks, and hardware/software.

ORIENTATION AND ONBOARDING ROLES AND RESPONSIBILITIES

NEW MINISTER / NEW HIRE ORIENTATION

| Status | ORGANIZATION RESPONSIBILITIES: PRIOR TO START DATE | Facilitator | Responsible |
|-----------|--|----------------------|---------------|
| not begun | Send offer letter confirming key information (e.g., position title, first day, schedule, location, salary, dress | Hiring Manager | Jane Example |
| not begun | Assemble Personnel File for New Employee | | |
| not begun | Job Description | Center Administrator | Sarah Example |
| not begun | Job Application | Center Administrator | Sarah Example |
| not begun | Resume | Center Administrator | Sarah Example |
| not begun | Offer Letter | Center Administrator | Sarah Example |
| not begun | Background Check | Center Administrator | Sarah Example |
| not begun | Send introductory message to staff, Board of Trustees, and congregation. | Hiring Manager | Jane Example |
| not begun | Provide new employee information regarding: | | |
| not begun | Payroll policies/frequency, sick leave, vacation, holiday time, and benefits | Hiring Manager | Jane Example |
| not begun | Parking, security, and building entry arrangements for first day. | Hiring Manager | Jane Example |
| not begun | Prepare desk/workspace, including any necessary office supplies and hardware/software. | | |
| not begun | Office or desk Assigned and required furniture procured | Center Administrator | Sarah Example |
| not begun | Keys to Building | Center Administrator | Sarah Example |
| not begun | Create Name Tag | Center Administrator | Sarah Example |
| not begun | Computer Assigned | Center Administrator | Sarah Example |
| not begun | Set up email account | Center Administrator | Sarah Example |
| not begun | Sharepoint Access | Center Administrator | Sarah Example |
| not begun | Breeze Account and Access | Center Administrator | Sarah Example |

| Status | ORGANIZATION RESPONSIBILITIES: PRIOR TO START DATE | Facilitator | Responsible |
|-----------|---|----------------------|---------------|
| not begun | Myrtle Access | Center Administrator | Sarah Example |
| Status | ORGANIZATION RESPONSIBILITIES: ON/AFTER START DATE | Facilitator | Responsible |
| not begun | Greet employee, conduct tour of office/building/grounds. | Hiring Manager | Jane Example |
| not begun | Provide a copy and review job description, roles and responsibilities, performance review guidelines, and | Hiring Manager | Jane Example |
| not begun | Provide a copy and review Payroll policies/frequency, sick leave, vacation, holiday time, and benefits, | Hiring Manager | Jane Example |
| not begun | Provide a copy and review Vision, Mission, Purpose, and Values for ministry | Hiring Manager | Jane Example |
| not begun | Provide Employee a copy of all key governance documents and discuss expectations for review and | Hiring Manager | Jane Example |
| not begun | Acquaint employee with Ministry organization structure - staff, Ministry Leaders, Board of Trustees, and | Hiring Manager | Jane Example |
| not begun | Arrange welcome meetings with colleagues and others if appropriate. | Hiring Manager | Jane Example |
| not begun | Enroll employee in benefits programs, or facilitate enrollment if applicable. | Hiring Manager | Jane Example |
| not begun | Set up employee in payroll system | Center Administrator | Sarah Example |
| not begun | Provide necessary account logins, email addresses, network registrations, etc. | Center Administrator | Sarah Example |
| not begun | Walk through software/hardware setup and login. | Hiring Manager | Jane Example |
| Status | EMPLOYEE RESPONSIBILITIES | Facilitator | Responsible |
| not begun | Fill out W-4 | New Hire | Joe Sample |
| not begun | Fill out Direct Deposit Form | New Hire | Joe Sample |
| not begun | Submit receipt of self-paid healthcare to Center Admin | New Hire | Joe Sample |
| not begun | Schedule any required meetings within first two weeks. | New Hire | Joe Sample |
| not begun | Set up and log into all necessary accounts, email addresses, networks, and hardware/software. | New Hire | Joe Sample |
| not begun | Obtain any necessary parking/building access codes, keys, badges, tags, and/or permissions. | New Hire | Joe Sample |
| not begun | in process | | |
| completed | overdue | | |

Minister: **Rev Joe Sample**
Center Admin: **[Name]**

NEW MINISTER ONBOARDING

ABOUT ONBOARDING

Minister onboarding takes orientation a step further. Not only is the Minister introduced to management and staff and acquainted with the organization's history,

ONBOARDING SNAPSHOT

Is a long-term, ongoing process for new Minister hires and internal promotions.
Takes place before and during the Minister's first days of work and into their first 90 days.
Informs Ministers on the organization's long-term mission, goals, strategies, and needs.
Offers training and guidance for the Minister's specific role.

ONBOARDING: GOALS AND OUTCOMES

Short-term (within first few days): Minister has completed orientation, submitted all new hire and enrollment paperwork, and been acquainted with the organization's background and mission. Minister's first-year onboarding plan, activities, goals, and outcomes are determined.

Long-term (within first 90 days): Minister has completed onboarding plan and activities and has achieved established goals and outcomes. Minister is participating in daily operations, is working effectively with staff, has been successfully evaluated by supervisors and/or stakeholders, and has established professional development goals for the following year(s).

NEW MINISTER ONBOARDING

| Status | ORGANIZATION RESPONSIBILITIES: ON/BEFORE START DATE | Facilitator | Responsible |
|-----------|--|----------------|----------------|
| not begun | Provide names, job titles, and background information on team members, organization leaders, and | Board delegate | |
| not begun | Appoint Minister mentor/coach to answer questions, guide Minister through proper policies and | Board delegate | |
| not begun | Schedule welcome meetings with colleagues and organization leaders/stakeholders. | Center Admin. | [Name] |
| Status | ORGANIZATION RESPONSIBILITIES: AFTER START DATE | Facilitator | Responsible |
| not begun | Review guidelines for relationship between board/other leaders and Minister. | Board delegate | |
| not begun | Establish expectations for relationship with Unity Regional and Worldwide organizations and provide | Board delegate | |
| not begun | Provide information about organizational goals, history, culture, structure, and financial background. | Board delegate | |
| not begun | Brief Minister on top issues that need attention in the first year. | Board delegate | |
| not begun | Jointly set goals and expectations for Minister during initial contract term. | Board delegate | |
| not begun | Review and provide a copy of Minister job description, schedule any necessary training and | Board delegate | |
| not begun | Schedule check-in meetings throughout the first year with Minister and organization leaders to gauge | Board delegate | |
| not begun | Conduct regular meetings with board/other leaders throughout the first year to update them on the | Board delegate | |
| Status | Minister RESPONSIBILITIES | Facilitator | Responsible |
| not begun | Determine and establish action plan to achieve near-term organizational goals. | Minister | Rev Joe Sample |
| not begun | Determine and establish action plan to achieve long-term organizational and professional development | Minister | Rev Joe Sample |
| not begun | Schedule any necessary meetings with team, colleagues, and leaders/stakeholders. | Minister | Rev Joe Sample |
| not begun | Seek networking opportunities and resources. | Minister | Rev Joe Sample |
| not begun | Seek guidance from mentor, organization leaders, and/or stakeholders regarding current or potential | Minister | Rev Joe Sample |
| not begun | <div>in process</div> <div>complete</div> <div>overdue</div> | | |

Onboarding activities, the four C's and two T's:

- **Compliance:** Providing basic legal information and training on rules and regulations.
- **Clarification:** Clarifying roles and expectations for new employees.
- **Culture:** Introducing new employees to organizational norms.
- **Connection:** Helping new employees establish networks and relationships.
- **Tools:** Providing tools in Information technology, accounts and devices and office tools.
- **Training:** Providing training on information technology and processes.

New Hire Orientation - This is done with every new hire including the minister.

New Hire Checklist - This is done with every new hire and is just a more detailed checklist to get to specifics on IT accounts etc.

Minister Onboarding - This is only done for the New Minister and includes extends the timeframe to one year and includes more engagement with board and others.