



# ORGANIZATIONAL

# HEALTH

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New Board Member  
and New Employee  
Orientations

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CSDA/BHI Management Consulting  
September 27, 2005

# New Board Member Orientation

*“What’s the Objective?”*

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- To best prepare new Board members with the information they need to serve effectively
- To educate new Board members on the authorities and constraints inherent in this role
- To assure that new Board members can get a running start with their new role

# New Board Member Orientation

*“The Situation/What is this?”*

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- The Situation - new Board members arrive with varied backgrounds, understandings, leanings, impressions, commitments, ideas and promises.
- The Task - *“deliberately addressing all aspects of how this District operates, some of its history, current status, and future plans.”*

# New Board Member Orientation

*“Why do this?”*

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- Its Proactive/Preparatory
  - Provide them with useful information - upfront
  - Allow for proper and factual information to flow
  - Provides guidance on “constraints”
  - The best time to provide historically relevant background
- Its Educational
  - Real, deliberate, factual, information
  - Introduction to the good governance model
  - History, perspective, mission
- Its Relational
  - A sincere effort to get off on the right foot - (leadership team!)
  - You have a chance to get to know one another
  - They can meet staff/employees - “face with name”

# New Board Member Orientation

*“Who and when should we do this?”*

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- General Manager AND the sitting Board President
- This should be done within the first two months after newly placed Member
- Process needs a staff POC!!

# Organizational PM

*“What Does an Orientation look like?”*

Proactively and deliberately addressing the areas of the District like:

- History of the District
- Review of District Mission/Vision/Strategic Plan
- Budget **BRIEF!!**
- Board Conduct briefing - policy/practices/cultural norms/ethics
- Organization Charts - Board related committees/functional and personnel
- Job descriptions
- HR Philosophy/Policy/ Practices/ limitations on Board Interactions
- Communications Policy/Plan
- Labor Contracts/GM Contract, last performance appraisal
- Employee manuals/new employee orientations
- Board Travel Policy
- Annual District Calendar
- Business Cards

# New Board Member Orientation

*“So why should we care?”*

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- Its just the right thing to do!!
  - Effectiveness of the New Member
  - Legal liabilities
  - Rates are liable
  - Compliance is in jeopardy
  - Morale suffers
  - The age of the Workforce (attrition)
  - Employee or workgroup “issues”
  - Inability to change
  - Organizational stress
  - Organizing
  - Safety

# New Board Member Orientation

“*Why Make This an Assigned Project?*”

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- Piecemeal approach usually means that important elements don't really get addressed!
- A comprehensive approach projectizes the effort, assuring the desired outcome.

# New Board Member Orientation

## *“How to Begin??”*

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- AGENDA: TBD List
  - Schedule a 45 minute Sr.Staff meeting with Board President
  - Review the ideas in this talk
  - Brainstorm your District specific needs and ideas
  - Discuss and decide who will be the POC
  - Make assignments clear
  - Set time for the next meeting -

# New Board Member Orientation

*“Outcome??”*

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- Pre-prepared binder of information with someone in charge of updating when needed
- A clear plan to optimize new Board Member effectiveness
- A better chance of allowing for positive relationships throughout the tenure

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**New Employee**

**Orientation**

# New Employee Orientation

*“What’s the Objective!”*

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- Help employees become more productive more quickly
- Weave employees into the organization in a planned functional way
- Provide new employees with valuable information
- Motivate new employees about working here!!
- Work to assure that our great new employees stay

# New Employee Orientation

## *“The Big Five”*

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- Knowledge of the job by hiring team
- Intelligent selection methodology
- Proper orientation of the new employee
- Solid first-line supervision
- Fair salary administration

# New Employee Orientation

## *“The Situation”*

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- We tend to celebrate when employees leave more than when they come
- We use the “firehose” approach
- We often take the process for granted
- TBD - Assess the indoctrination that you got!

# New Employee Orientation

*“Why bother with all this effort?”*

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- Texas Instruments: “Accelerated Productivity”
- Proven strong correlation between first blush relationships and employee longevity
- Demonstrates what we often say - “Our employees are sooo important”
- Corning Glass: “69% of new employees were more likely to remain after three years if they had a full orientation program”
- Softens internal organizational fit
- Works the “New Job Remorse” issue

# New Employee Orientation

## *“What Does One Do?”*

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- It does the data, yet it motivates
- It introduces and it allows the formation of positive relationships
- It is comprehensive, yet it may take two weeks to do it right
- It is introductory, yet it recognizes the need for experiential training.

# New Employee Orientation

## *“What Does One Look Like?”*

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- Begins before the employee’s start date
- First day or two, a balance of motivation, employment information, introduction and settling in.
- Next days (2-3) tour, shadowing relevant related jobs/functions
- First 3 months - an assigned partner/mentor/coach

# New Employee Orientation

## *“What Does One Look Like?”*

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### ■ Before the start date

#### ■ A week prior to start date

- a full agenda is produced and reviewed/approved by manager
- Business cards ordered - computer or other tools in place
- Furniture, cubicle,
- Email account, codes-passwords, cell phone, office phone established
- Access badge readied, updated organizational chart
- Clear set of needed documents ready with easy, non-confusing instructions and timelines attached
- A “Who to Contact” list

# New Employee Orientation

## *“What Does One Look Like?”*

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- Before the start date (cont.)
  - The weekend before - a welcome call at home from supervisor/manager, not HR!!
    - Provide a warm welcome to our “family”
    - Where to be when
    - Who to look for
    - What to wear, what to bring
    - What to expect

# New Employee Orientation

## *“What Does One Look Like?”*

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### ■ Start Day - or Two

- Someone waiting---Supervisor!
- Warm welcome
- Clarity in what will happen next
- A schedule - with their name
- A review by upper manager on District Mission/Vision/Strategy
  - Motivational - Success oriented - Positive in Nature
- A point for review of:
  - Office/workplace(nameplate?)
  - Computer/vehicle/equipment/important places/business cards
  - Providing needed documentation (*could be pre-start date activity*)
  - Job description review with first-line supv. - defined success?
- Tour - names and functions and discussion of inter-relationship

# New Employee Orientation

## *“What Does One Look Like?”*

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- After Day 1 or 2:
  - Closely inter-related job shadowing
    - Example: New meter-readers shadow front counter office for 4 hours
    - Example: New administrative assistant for operations shadows plant operators for a day

# New Employee Orientation

## *“What Does One Look Like?”*

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- First three months:
  - *Assign a function-specific mentor/coach/partner with very specific expectations*
    - Mentors should be trained
    - Good mentors must be recognized and rewarded
    - All mentors must be well managed
- At three months - a management assessment to determine progress

# New Employee Orientation

## “Tips!!” What to Include...

- **Company Direction**
  - District Mission/Vision
  - District Strategy/Goals
  - District History
  - Organization Chart
  - Facility Tour
  - Quality Program
  - New empl. Photo/bio in newsletter
  - Lunch with GM
  - Industry awards
- **Benefits**
  - Medical/Dental/Vision
  - Short-term disability
  - Life Insurance
  - Flexible Spending Accounts
  - Tuition Reimbursement
  - Vacation
  - Personal Leave
  - Sick Leave
  - On-site or near day care
  - Compensation/Bonus program
  - Holidays/floating holiday
  - Pension/retirement program
  - Cafeteria Programs
  - Personal Accident insurance
- Paid Leave/Charity time
- Employee Discounts
- Child Care Assistance
- Sick Child Assistance
- Employee Assistance Program
- Workout facilities
- New hire referral program
- Business Travel Insurance
- **Company Policies and Procedures**
  - Work Hours/schedule options
  - Telephone usage
  - Internet usage
  - Telephone directory
  - Computer usage
  - Payroll schedule
  - Travel
  - Sick leave
  - Performance appraisals
  - Corp. credit cards
  - Ethics
  - Conduct
  - Emergency policy
  - Environmental
  - Purchasing
  - Breaks/meals
  - Weapons
  - Alcohol/drugs
- Visitors
- Workers Comp.
- Conflict of interest
- Ergonomics
- Jury duty
- Gum chewing
- Uniforms
- Employee suggestions
- Family leave
- Smoking
- Interoffice mail
- Grooming guidelines
- Dress code
- Parking
- E-mails
- Timesheets
- Sexual Harassment
- Recycling
- Bereavement
- Overtime
- Expense reports
- Conference rooms
- Breakrooms
- Union policies
- Attendance
- Tardiness
- Training Plans

# New Employee Orientation

## “Tips!!” What to Include...

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### ■ **Company Policies and Procedures**

- Flextime
- Disabilities
- Gross Misconduct
- Confidentiality
- Solicitation
- Copier/ Office equipment usage
- Office furniture
- Policy on personal radio usage
- Voicemail policy
- Visitors
- Company property policies

### ■ **Company Programs and Services**

- Safety
- Training
- Volunteer
- Training
- Continuing Education
- Apprenticeship
- Operator Academy
- Wellness/Fitness
- Technical Training
- Employee Sports Teams
- Career Planning
- Weight Control
- Prenatal Programs

# New Employee Orientation

## -- Summary

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- My job here - not to really provide great ideas but...
  - Provide you with the motivation to really make this happen!!
- New employees can be your greatest producers or your biggest projects --
  - You choose!
- Make the commitment



□ **Organizational Consulting for Special Districts**

- Training courses workshops, and consulting for Districts are available in several areas of organizational management including;
- **Organizational Assessments**
- **Executive Search/Placement**
- **Compensation Studies**
- **Strategic Planning**
- **Board Workshops**
- **Interviewing Skills for Managers**
- **Optimizing Teams , Job Descriptions ,**
- **Employee Recruiting , Employee Retention ,**
- **Supervision 101 ,** and more.
- Individualized consulting for all small business personnel related matters.

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# Brent Ives - BIO

Brent H. Ives - Principal, BHI Management Consulting

- A 27 year career as a technical group manager with Lawrence Livermore National Laboratory
- an independent consultant to public and private business for
- a 14 year City Council Member and Fire Authority Board E TRACY
- Faculty Member of the California Special Districts Association "Governance Academy"