

## Senior Leader Onboarding Check List (for Department Leaders grade 59 and above)

*This check list will serve as a roadmap for incoming senior leaders in to order plan and prepare for their arrival and to ensure the leaders successful entrance into the organization. It's important to provide the senior leader with the resources, tools and time to successfully accomplish tasks in these phases.*

Onboarding Timeline	Hiring Manager/Department	New Leader
<b>Pre-Onboarding</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Pre-designated department contact connects with the new senior leader to begin the logistical onboarding process set forth in the signed offer letter materials</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Works with HR Partner to obtain the resume, job description, and past performance reviews of direct reports as needed</li> </ul>
<b>Day 1/Week 1</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Schedules welcome meeting for the senior leader</li> <li><input type="checkbox"/> Introduces the senior leader to direct reports, staff, other leaders as applicable</li> <li><input type="checkbox"/> Sends an email out to all department (and/or SPH, as appropriate) to announce their arrival</li> <li><input type="checkbox"/> Conducts transition meeting to provide the senior leader with information about the team. The meeting should include:               <ul style="list-style-type: none"> <li>○ Organizational history, culture, priorities and “lessons learned”</li> <li>○ Fact sheets on the “hot topics” that will require the senior leader’s attention within the first 90 days</li> <li>○ A brief introduction to personnel policies and rules for <a href="#">union (HUCTW) staff</a> and <a href="#">non-union staff</a> (i.e. – financial “dos and don’ts”, hiring, firing, senior leader support, etc.)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Reviews list of key contacts and stakeholders and begins to schedule introductory calls/meetings</li> <li><input type="checkbox"/> Schedules individual and team meetings with direct reports and staff, including recurring weekly or biweekly meetings with direct reports</li> <li><input type="checkbox"/> Registers for the <a href="#">Universal Manager’s Training</a> through Harvard Training Portal</li> <li><input type="checkbox"/> Registers for the <a href="#">Harvard Longwood Campus Manager’s Series</a> through Harvard Training Portal</li> </ul>

	<ul style="list-style-type: none"> <li>○ A discussion of initial projects and roles and responsibilities, including past performance standards and expectations</li> <li>□ Meets with senior leader to ensure that job roles, responsibilities, and the 6-month orientation and review period are clearly communicated</li> <li>□ Takes the senior leader to lunch (or virtual Zoom lunch)</li> </ul>	
<b>First 30 Days</b>	<ul style="list-style-type: none"> <li>□ Finalizes the senior leader's performance objectives</li> <li>□ Facilitates networking opportunities and provides resources to make networking possible for the senior leader</li> <li>□ Discusses and shares individual work styles and preferences to ensure working success</li> </ul>	<ul style="list-style-type: none"> <li>□ Schedules regular check-ins for feedback with their manager</li> <li>□ Consider using the Communications Styles Diagnostic tool via CWD for team building - discuss and share individual work styles and preferences to ensure working success</li> <li>□ Continues scheduling appointments with key SPH, University, and/or external stakeholders, and consults with manager to identify additional relevant stakeholders as needed</li> <li>□ Registers for additional training and coaching under the <a href="#">New Leader Assimilation Program (NLAP)</a></li> </ul>
<b>First 90 Days</b>	<ul style="list-style-type: none"> <li>□ Schedules formal 3 or 6-month review meeting with senior leader, as outlined in the signed offer letter</li> <li>□ Recommends professional development opportunities for senior leader as needed</li> </ul>	<ul style="list-style-type: none"> <li>□ Identifies professional development opportunities</li> <li>□ Begins developing strategic plans for the department and/or documenting key priorities</li> <li>□ Reviews performance objectives with their manager, highlighting</li> </ul>

		successes and discussing current/potential roadblocks
<b>6 to 9 Months</b>	<input type="checkbox"/> Maintains regular check-ins with senior leader around assimilation, individual and team performance, goals, deliverables, and expectations	<input type="checkbox"/> Engages in a leadership assessment process (i.e. – 360, Myers-Briggs Type Indicator, etc.) for developmental purposes and to identify areas for improvement; follows up with coaching and/or an action plan as appropriate
<b>1 Year</b>	<input type="checkbox"/> Schedules <a href="#">annual performance review</a> meeting with senior leader	<input type="checkbox"/> Develops a roadmap for long-term success (individual and team) and continues to share & meet with manager as appropriate

The onboarding process may conclude 1 year after the incoming senior leader’s arrival, with a final 360° assessment or other leadership review. This provides the leader with additional feedback and an opportunity to see if onboarding and change efforts are working as intended.

**Additional Onboarding Resources:**

- [Remote Onboarding Guide](#)
- [Onboarding & Retention Slide Deck](#)
- [Job Aid and Guidance for Hiring Biweekly, Weekly and Monthly Employees in Wasabi](#)
- [Add Position and Supporting Payroll Documentation for Bi-Weekly Actions](#)