

Colorado State University

Advisor Onboarding

Suggested Best Practices and Timeline

This document outlines practices for new staff in an academic guidance role as they arrive at the University and transition in to their role and work on campus. It is a living document, so please share recommendations forward with your department and/or those listed below.

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Before Employee Arrives (post hiring processes)

- Ensure all hiring authority tasks (and human resources tasks) are complete and final
- Identify a lead or point person to facilitate onboarding and training

Communication is critical to the transition. Email prior to arrival.

- Logistics – keys, building access, transportation options (costs and limits of parking). Help staff understand how they will get to campus and access their building/office for first day of work.
- CSU Structure
- New Employee Orientation
- Department Training Schedule with training staff already scheduled to lead
 - Consider providing trainers with topics to cover
 - Set up opportunities for new staff to shadow (reverse shadowing?)
- First Day itinerary
- For first week, if hosting staff for meal, communicate when that will be

Reference Campus Advisor Training and Foundations list for topics and tours

- Identify how dates for next advising sessions fit with new hire start time
- Review fitting online resources (national advising resources like NACADA; CSU resources like advising.colostate.edu)

Help new hire feel welcome and important immediately

- Assign a guide for first day
- Consider a start time (1 hour after opening) that allows experienced/existing office staff to set up, then give new staff full attention
- Identify advising colleagues to serve as mentor/point person (from larger advising community if not co-workers in dept)
- Create welcome sign (other ideas include CSU pin, small welcome gift, something to signify welcome from specific department)
- Schedule IT set up & overview
- Schedule phone set up
- Discuss process for office requests (ergonomics, lighting, comfort in your space)
- Schedule a meeting with supervision/leadership

- Communicate start date to co-workers
- Update webpage with contact information for the advisor

Compile/Share Office Handbook/Wiki/Manual

- Dress code
- Culture (lunch, communication etiquette, technology usage, etc.)
- Human resource practices (leave requests, expectations for illness, how to clock in as needed)
- Mission/Vision/Values
- Directory/office contact list
- Voicemail & Email instructions
- Frequently Used Acronyms
- CSU Resource Directory
- Remote computer access instructions
- Professional Development opportunities/support (on/off campus)
 - Share grid of Prof Dev on campus (from ASC grid)

First Day

Create accounts, as appropriate, provide access, and give links to tutorials for tools and files

Consider if it is fitting to have these done prior to arrival

- AriesWeb
- Aries (Banner)
- Department/College Server files
- Have employee added to appropriate listservs (Advising_at_CSU; Professional Advising Network; new ASCs should be on the Academic Success Coordinator listserv)

Welcoming

- Greet new member
- Make office introductions
- Provide tour (department and college)
- Encourage new staff to personalize their space and norms for what is possible (and professional)
- Share articles/references to aid new staff transitioning to your unit/dept./college

Share Expectations and Resources

- Meet to discuss job description, expectations, responsibilities, etc.
- Help new staff understand how role ties in to mission/vision/goals of the organization. (We all want to know we have purpose and will make an impact and contributions to the work we do!)
- Have list of essential web tools in advising at CSU (suggest new staff to bookmark)

Office Resources

- Talk about norms of office culture
- Review/discuss office handbook/manual/wiki
- Review department orientation/training schedule
- Make space for new staff to bring in items to personalize space

Logistics

- Order business cards, name badge

- If using name plates and/or team/staff shirts order for new hire
- Identify any remaining New Employee Paperwork that is needed
- Obtain sick/emergency contact info

First Few Weeks

Welcome and Community

- First week, consider hosting new staff for meal (brkfast/lunch - communicate beforehand)

Meetings

- Set up regular 1:1 meetings
- Set up informational meetings with faculty/staff within department/college
- Expose person to how Office/Department role fits in to external functions
 - Give background to and/or philosophy for advising role
- Bring new hire to meetings for projects they'll be involved with in their role.

Sharing Expectations and Resources

- Communicate or schedule on calendar upcoming meetings, trainings, important dates
- Continue advising appointment shadowing
- Support new staff as they get in to more depth with advising systems and technology
- Meet contacts and important resources around campus
- Attend courses that are important to curriculum
- Introduce new staff to student clubs and organizations relevant to advisee population

At 30/60/90/180 Days

Community

- Teambuilding – Craft intentional experiences to help build staff community
- Highlight CSU “Principles of Community” (<http://diversity.colostate.edu/principles-of-community>)

Assess Growth and Share Resources

- Mark calendar for 30/60/90 days out to follow up with questions, concerns, etc.
 - Communicate interest in successful transition and helping them succeed
- Assessment with New Staff
 - Craft ways to assess how much new staff knows (focused on key dept concepts, practices, policies)
 - Discussion of concepts learned / areas developed
 - The above two should identify gaps in knowledge
- Identify areas of confusion or struggle and shore up resources to help with learning
- Offer resources and references that outline advising structures and skill development, such as CSU Advising Foundations Sheet, CAS Standards, development grids, or Professional Advancement Grid
- Introduce campus philosophies and practices

Goal Setting

- Identify tasks to be handed over (create practice for smooth transition)
- At 90 and 180 days, do a pre-annual review-type meeting focused on setting/refining goals and visiting direction in advising

Other Ideas

Encourage familiarity with campus

- Take campus tour through Admissions
- Participate in Division/Dept and CSU New Employee Orientations

Share broader office culture and practices

Encourage involvement (Professional Advising Network, uTurn, National Academic Advising Association (NACADA), Diversity, Professional events on/off campus, Campus committees, etc.)

Debrief employee's values to see how they align with CSU/Division/Dept/Office values.