

Setting Expectations for Employees: Onboarding & Evaluations | Best Practice Resource Guide

Updated and Distributed by: Office of Parish and School Human Resources

Archdiocese of Milwaukee

Updated August 2023

A new employee and employer start with common goals working toward the mission of the organization. The key is to maintain enjoyment in the exchange of services received and given. In other words, the employee brings knowledge, ability, skills, and creativity for the well-being of the organization and the community. In turn, the organization receives material and non-material services that contribute to the growth/expansion of the mission. The goal is to maintain the engagement and zest of the employment arrangement throughout the employee/employer relationship.

Orientation vs. Onboarding:

In 2011, Talya N. Bauer, in “*Onboarding new employees: Maximizing success*,” defines employee onboarding as “the process of getting new hires adjusted to the social and performance aspects of their new jobs quickly and smoothly. It is the process through which new hires learn the attitudes, knowledge, skills, and behaviors required to function effectively within an organization.”

This process of onboarding starts with paperwork that meets legal requirements and defines expectations and culture. This first part of onboarding is called orientation. As stated in previous Spark Notes, the offer to hire is contingent upon both state and national background checks, completion of Safeguarding All God’s Children training, references, and if in maintenance, the physical exam provided by Catholic Mutual. An employee *orientation* checklist contains a summary of paperwork and expectations that need to be shared. An employee *onboarding* checklist contains a timeline that covers information beyond the first day of work, sometimes into the first one to two years.

Sample Orientation Checklist:

Done	Employment Paperwork	Done	Benefit Paperwork
	Completed and Signed Application		Health Insurance
	Signed offer letter or contract		
	State & National Background Check		Dental Insurance
	Safe Environment Certification		
	References		Vision Insurance
	Credit Report, if applicable		
	I-9 Form		Life Insurance
	Acknowledgment of Receipt of Handbook		Long Term Disability Insurance
	Acknowledgment of Code of Ethical Standards		Flexible Spending
	Signed Job Description		Pension Plan
	W-4/WT-4 Withholding		403(b) Plan Information
	Direct Deposit		Review of Hours & Overtime
	Payroll Schedule		Review of Vacation Time
	Employee Information Form (address & emergency contact)		Review of Sick Time
	Performance Review Form & Process		Review of Personal Days
	Individual Policies: Key, Computer, etc.		Review of Holiday/Holy Days

	Computer Password(s) and Logins, email		Continuing Education
	Mission Statement, Vision, & Values		
	Organization Chart		
	Meeting(s) Schedule		
	Human Resources Processing		
	Entered in the payroll system, including direct deposit confirmation		
	Phone and computer equipment active		
	Archmil.org account if applicable		
	Entered on employee roster		
	Enrolled in benefits systems		
	Added to calendar for perf. Reviews		
	Set up email and other programs as needed		
	Website access if applicable		
	Entered on Pastor's birthday listing		

Sample Onboarding Checklist:

Minimum two weeks prior	Action Item	Date Completed
	Complete Technology New Hire Form and send to IT team	
	Begin office preparation including any needed cleaning and painting, and ensuring necessary furniture is moved in	
	Create a schedule for the new hire's first week (at minimum), including key people to meet, and important meetings	
	Arrange welcome lunch for first day and invite team members	
Day One	Action Item	Date Completed
	Bring in office warming plant and hang welcome sign on door	
	HR will greet new employee and conduct HR orientation at [time]; IT Team will conduct IT orientation at [time] at employee's desk (see orientation checklist)	
	Office overview: team organization, departmental workflow, team goals, interaction with other offices, team meetings	
	Office expectations: punctuality and attendance, attire, internal and external communication guidelines, departmental procedures and processes	
	Individual expectations: review job description, work schedule, breaks, lunch period, individual responsibilities, performance goals, performance management process, and requesting time off	
	Organizational structure and chart (i.e., offices and responsibilities)	

	Parish/school and archdiocesan communication methods: Website, e-mail, Quicklets, newsletter, First Friday mass and lunch, etc.	
Within Week 1	Action Item	Date Completed
	Begin new hire training on job responsibilities	
	Arrange training with other offices, as necessary	
	Tour of building, including info about offices and staff introductions, restrooms, kitchen, water, vending and courtyard	
	Review parish/school mission, vision, history	
	Train on copiers, printers & phone using IT tools	
	Gather and forward information for business cards (if appropriate)	
	Order office supplies through business manager	
Within Week 2	Action Item	Date Completed
	Schedule weekly one-on-one meetings with employee to address any questions, issues, or concerns; manager to provide direction and feedback	
	Create 90-day goals and explain the 90-day review process	

Personnel Records:

An employer maintains a personnel record/file for each employee. Personnel records will be maintained in a confidential manner. Employee paperwork must be completed and maintained in certain files:

1. Personnel file – application, resume, work permit, signed job description, offer letter, disclaimer and acknowledgment forms, W-4, WT-4 for new hire reporting, direct deposit, 403(b), vacation time, documentation of training received, performance evaluations, and written warnings, letters of recognition, and awards, job related action documentation (promotion, transfer, layoff), terminations notice and documentation.
 - a. Contracted employee files must also include State Certification or Plan or Stud, Official transcript of Credits and University-Credentials, Religious Education Certification, and signed contracts.
2. Separate file (Confidential File)– interview notes, reference checks, background checks, welfare inquires, child support and garnishments, employee information sheet, drug test results, EEO self-identification, litigation documents
3. Medical file – benefits enrollment forms, doctor’s excuses, FMLA and other leave paperwork.
4. Immigration (I-9) forms are not to be included in a personnel file, **all** I-9s should be kept together in a ring binder separate from the personnel files.

Connection:

A job description is a great place to start. However, the commitment and connection deepen when an individual can see beyond the duties and recognize how they contribute to the whole. The ability to serve and have connection with others can bring forth Christ-like qualities on a personal level. Connection starts with introductions to other team members in and outside the organization. Encouraging participation in Archdiocesan opportunities and other organizations that relate to a position fosters partnerships and opportunities for growth in the position.

Frequent and Targeted Feedback:

The learning curve in Church work is steep because it is a ministry, and many positions require wearing multiple hats. This can be exciting as well as overwhelming. Thus, gaining insight from a supervisor and mentor may help an employee understand the Church from all angles.

Employees need the support of and a connection with their supervisor. Communication is key in any relationship. Sitting down and discussing the framework of the job, asking and answering questions, and sharing insight offers the opportunity for the supervisor to get to know the employee and provide timely feedback and affirmation. Fostering an enjoyable and productive work environment serves the entire staff and community.

Just before 90 days of employment and on a yearly basis, it is important to compare the job description with the individual's performance. It is important to dialog using a performance evaluation tool. The Office for Schools has a specific rubric for teachers and principals. See the sample performance evaluation for at will employees.

Mentor:

In addition to having the right resources to doing the job, having a mentor for the first year may help support the individual in his/her role. The mentor may be from the same organization and/or in a similar role in another parish/school. The ideal mentor is one who is familiar with Church, respectful of the roles within Church, and able to listen, provide reflection, and offer insight.

A big factor in employee retention is a maintaining two-way communication. Performance evaluation and developing an effective means to communicate on a weekly basis is good for the organization, the employee, and the employer.

Performance Evaluation Sample for At Will Employees

Name - _____ Time Frame of Evaluation - _____

Position - _____ Date - _____

Purpose:

Employees look to their supervisor for direction in professional development. Employees also look for some indication as to how well s/he contributing on the job and how s/he can further improve job performance. The performance evaluation will help to build a better understanding between the employee and the supervisor and clarify mutual objectives.

Directions: One week prior to the performance evaluation meeting, distribute the employee's job description and performance evaluation to the employee. Ask the employee to complete and return to his/her supervisor a few days before the review date.

Job Knowledge Employee Rating = _____ Supervisor Rating = _____ Final Rating = _____

Knowledge of the parish's/school's process/system, policies and procedures; OR knowledge of techniques, skills, equipment, procedures, and materials.

5 = Expert in job, has thorough grasp of all phases of job

4 = Very well informed, seldom requires assistance and instruction

3 = Satisfactory job knowledge, understands and performs most phases of job well, occasionally requires assistance or instruction.

2 = Limited knowledge, further training/assistance required.

1 = Lacks knowledge to perform job properly

Comments:

Quality of Work Employee Rating = _____ Supervisor Rating = _____ Final Rating = _____

Freedom from errors and mistakes. Accuracy and quality of work in general.

5 = Highest quality possible, final job virtually perfect.

4 = Quality above average with very few errors and mistakes.

3 = Quality satisfactory, generally produces error free work.

2 = Room for improvement, frequent errors, requires checking/redoing.

1 = Excessive errors and mistakes, very poor quality.

Comments:

Quantity of Work Employee Rating = _____ Supervisor Rating = _____ Final Rating = _____

Work output of the employee.

5 = High volume producer, always does more than is expected.

4 = Produces more than most, above average.

3 = Handles satisfactory volume, occasionally does more than required.

2 = Barely acceptable, low output, below average.

1 = Extremely low output, not acceptable.

Comments:

Reliability Employee Rating = _____ Supervisor Rating = _____ Final Rating = _____

The extent to which the employee can be depended upon to be available for work, do it properly, complete it on time; is reliable, trustworthy, and persistent. Respects, supports organizational, and department policies.

Responds to requests in a timely manner.

5 = Highly persistent, always gets the job done early or on time.

4 = Reliable, usually persists in spite of difficulty, gets the job done on time.

3 = Usually gets the job done on time with average persistence.

2 = Sometimes unreliable, avoids responsibility, satisfied with minimum.

1 = Unreliable, does not accept responsibility, gives up easily.

Comments:

Cooperation Employee Rating = _____ Supervisor Rating = _____ Final Rating = _____

Willingness to work harmoniously with others to complete projects. Can deal with differences constructively.

Seeks and welcomes feedback.

5 = Extremely cooperative, inspires teamwork/good attitude in others.

4 = Goes out of the way to cooperate and get along.

3 = Cooperative, gets along with others.

2 = Indifferent, little effort to cooperate, is disruptive to overall group.

1 = Negative and hard to get along with.

Comments:

Communication Skills Rating = ____ Supervisor Rating = ____ Final Rating = ____

The employee listens, promptly and consistently shares relevant information and is articulate in expressing him/herself both verbally and in writing. Maintains a professional and respectful demeanor in both written and verbal communications.

5 = Excellent. Communicates clearly, professionally, and fluidly with all team members ensuring a job well done, even in delicate situations. Written and verbal skills are outstanding.

4 = Respectful and professional, strong verbal and written communication. Encourages others input.

3 = Friendly and professional. Written and verbal skills are appropriate.

2 = Needs improvement. Uses slang or sarcasm or misses the point. Doesn't consider other's ideas.

1 = Lacks professional and respectful communication skills. Has little patience. Needs tact and tone

Comments:

Attendance Employee Rating = ____ Supervisor Rating = ____ Final Rating = ____

Faithfulness in coming to work daily and conforming to scheduled work hours.

5 = Always prompt or early, perfect attendance, absent only in rare emergency, and never tardy.

4 = Prompt in attendance, normally pre-planned absences, and rarely, if ever, tardy.

3 = Usually present and on time, few unplanned absences, tardy at times.

2 = Lax in attendance/promptness, need to improve to meet standard

1 = Often absent without sufficient reason, frequently is late/leaves early, numerous unplanned absences.

Comments:

Separate Sheet from Employee and Separate Sheet from Employer Covering:

- Employee comment on: accomplishments, areas of the job that are most fulfilling and/or most difficult, and help your supervisor can do to assist in meeting job goals and responsibilities.
- Supervisor comment on employee's exceptional and/or areas for improved performance, and goals for next period of time.
- Employee and Supervisor consider and incorporate: Initiative, follow through, interpersonal skills, respect of others, teamwork, judgment, organization skills, oral communication, written communication, adaptability, time management, leadership, etc.

Goals:

Employee Signature = _____

Supervisor/Manger = _____

Date = _____

Date = _____