



INSIGHTFUL THINKING. CUSTOM SOLUTIONS.
SUSTAINABLE RESULTS.



Best Practices to Develop an Engaging Employee Handbook and New Hire Orientation

2023 FAHRO Annual Conference
and Trade Show

August 23, 2023

About the Founder & CEO – Jen Martinez



- Started “CHRP” in 2018 in Nevada – registered in Florida and Nevada
- We provide strategic and operational HR services across the public sector, private sector and non-profit
- More than 25 years of global and US experience working with premier publicly traded and private equity ownership with revenues from 500M – 3B+
- Partner with companies who care deeply about their people and culture
- Passionate about giving back and volunteering



Discussion

- Employee Handbooks
 - Your current handbook
 - How to Get Started
 - What to Include-What to Update
 - Best Practice Tips
- New Hire Orientation
 - Planning
 - Preboarding Activities
 - Energizing Your Orientation Program

First, a few questions...

- When was the last time you suggested to a team member (someone on your staff) that they look something up in the handbook or **use for assistance** in with a question or problem?
- When was the last time you used your agency's employee handbook? What for? Was it useful? What was missing that you needed?
- When was the last time your handbook was updated? What parts were updated?
- How long does it typically take you to meet/greet (face-to-face) a new employee? Their first day on the job? First week? First month?
- When team members leave the agency before 90 days, do you know why? Does this happen very often?

Small Group Discussion

What are the benefits of having an employee handbook?



The handbook, generally speaking...

- First and foremost, it's a communication tool.
- The format of the handbook suggests/reinforces your culture. Key to this: **Is it up to date?**
- Serves as a resource for employees to check vacation and sick leave policies, timekeeping policies, code of conduct, etc.
- Formalizes your employment policies and procedures, keeping them consistent and ensuring all team members are on the same page
- Decreases the risk of employee complaints and lawsuits, such as employees claiming you did not tell them about their workplace rights





Sets the Culture Tone-the Personal/Passion Side

- Helps new employees feel at home in their new work environments.
- Increases employee engagement and loyalty through learning about the company's history, mission, and core values.
- Simplifies the onboarding process by providing each new employee with easy access to the information they need.



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In tone and content, handbooks can blend the legal with the agency's passion and heart.

- Explain the kind of agency you want to operate and how your employees play a pivotal role in that story
- Vision, mission, and core values should resonate with employees' reasons for working with you

Suggestions for Content Categories

- **The Agency's Heart and Its Passion**
- Compensation, Benefits, and Perks
- Code of Conduct
- Workplace Safety and Security
- Anti-Discrimination and Equal Opportunity Policies
- Digital Conduct and Social Media Policy
- Schedule, Hours of Operation, and Paid Time Off (PTO)
- Leaves of Absence
- Non-Disclosure and Conflicts of Interest

EMPLOYEE
HANDBOOK

Possibilities for Passion Content

- Your agency's mission, vision, and values
- Your values and beliefs—the guiding principles driving every aspect of your agency; be clear what you stand for
- Welcome letter from Executive Director or CEO
- Agency's origin story and historical/operational timeline
- Photos of staff and workplace, welcoming comments from staff
- Photos of projects in action (with permissions)
- Statistics that have an impact, e.g., agency size, growth trajectory, people served, etc.
- Agency-sponsored events, e.g., annual outings, employee celebrations, volunteer efforts, etc.

OUR AGENCY CULTURE

OUR MISSION

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OUR VISION

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Don't Reinvent the Wheel

- Save handbook development time by consolidating information from existing sources.
- Use either a simple word-processed document as part of your onboarding process, or something visual and special that can be delivered in-person and accessed online. Pull specific pages from online version as needed for NEO.
- Know your agency's history, practices, and culture to set the tone and determine what policies to include
- Keep the design simple. Keep it organized—incorporate a strong Table of Contents.
- Be personal with the text. Get to the real questions employees want answers to.



TEAM MEMBER CULTURE GUIDE

2023

Committed to provide quality affordable housing to enhance the lives of our residents and promote their independence

Welcome to Sarasota Housing Authority!

For those of you who are just joining Sarasota Housing Authority as new team members, on behalf of the Agency, let me extend a warm and sincere welcome! And for those team members who have been with us, we very much appreciate and thank you for your past and continued service.

I extend my personal best wishes for success and fulfillment here at Sarasota Housing Authority. We understand that it is our team members who provide the services that our clients and residents rely upon, and who will enable us to create new opportunities in the years to come.

We also know that our strongest asset is *you*, and that no one can anticipate every work-related issue or need that may arise. If you have a specific concern, idea, or need, please tell us. We value your service and the good work you do each day to make the Agency effective in carrying out our important mission. We look forward to a mutually rewarding relationship with you.

Again, may we extend a heartfelt **WELCOME!**



William Russell, President and Chief Executive Officer
Sarasota Housing Authority

Our Mission

“We are committed to provide quality affordable housing to enhance the lives of our residents and promote their independence.”

Our Vision

“Over the next 5 years, SHA will endeavor to further our missions and awareness of the positive attributes of our programs with the following vision in our mind:

- House more families.
- Modernize Bertha Mitchell, McCown, and the Annex.
- Revitalize neighborhoods through responsible development, to include Cypress Square, Lofts on Lemon 2, Central Gardens, and Cypress Square 2 and 3.
- Enhance the lives of the residents with comprehensive social programs, excellent property management, and customer service.
- Market and raise awareness of the positive impact of our programs for the families and neighborhoods.
- Foster an entrepreneurial spirit and reduce our dependency on HUD subsidies.”

Our Core Values

1. We value the human dignity in each person.
2. We value honesty.
3. We value diversity.
4. We value curiosity.
5. We value healthy stewardship.

Legal Compliance



- No law requires an organization to have an employee handbook
- Most organizations have policies or procedures governing their employment practices, sometimes maintained informally
- However, many federal and state laws require employers to inform employees of their rights in the workplace
- Not having a handbook can lead to inconsistent application and confusion about employer and employee rights and responsibilities
- An employee handbook is one of the best ways to deliver this information to your employees

Dive into Policies and Procedures

- Use the tone and style that reflect your agency's values
- Include required policies using a Q&A style format. Don't assume familiarity with acronyms.
- Cross reference policies as needed.
- Carefully review procedures prior to publishing for clarity.
- Provide interesting examples so employees gain context and clarity



Conflict Mitigation

- Outlines the agency's code of conduct, so that employees know which behaviors are acceptable and which ones are not—The code sets a tone.
- Explain the consequences of poor behavior.
- A code of conduct deters employees from engaging in toxic conduct and encourage healthy behaviors and attitudes.



Involve Key Stakeholders

- Ask for feedback on draft sections/product from trained professionals familiar with the latest federal, local, and state laws: HR, consultants, employment attorneys
- Ensures you have articulated information clearly and avoids uncertainty, misinterpretation, or liability
- Reviews pay dividends down the road

Make Regular Updates

- Listen to your employees, peers, HR staff, and lawyers throughout the year
- Be sure your manual keeps pace with current trends and times
- Review at least once a year and make material updates when needed



Short Partners Discussion

Moving your handbook off the corner shelf...

Working with a partner...

...Generate a list of seven-eight ways you might use to “activate” your handbook—getting it off the shelf and injected into more day-to-day use.

Policies to Avoid



- Prohibiting employees from discussing their pay with coworkers
- English-only policies
- Prohibiting lawful off-duty conduct
- Blanket policies on criminal convictions
- Withholding final pay until agency property is returned
- Refusing to pay unauthorized overtime/early punch-ins
- Requiring a doctor's note for every sick day
- Non-disparagement (under recent legal review)

Important Handbook Disclaimers

- The handbook is not a binding contract and does not guarantee further employment
- Policies as written in the handbook supersede any memos or documents that may have been circulated to employees before its inception
- Policies are subject to change; agency has right to change policies as business evolves
- NLRB statement(s), e.g., “Nothing in this handbook is intended to limit any concerted activities by employees protected by Section 7 of the National Labor Relations Act”
- Employees are required to read and acknowledge receipt of the employee handbook

Moving on to...

New Employee Orientation- Best Practices for Engagement



Small Group Discussion

**Do you have a formal Day(1) orientation? When was the last time you updated your new hire orientation (Day 1)?
What did you change and why?**



With a solid NEO and onboarding plan, you are:

Having a strategic impact.
Reducing uncertainty.
Building motivation.
Personalizing the process.



- Great onboarding may increase retention by 82%
- A year-long onboarding program builds proficiency faster
- Up to 20% of worker turnover happens during the first 45 days of employment
- Assigning a new recruit a mentor improves their productivity in 87% of the companies

SOURCE: Employee Onboarding Statistics You Must Know in 2023 (hrcloud.com)

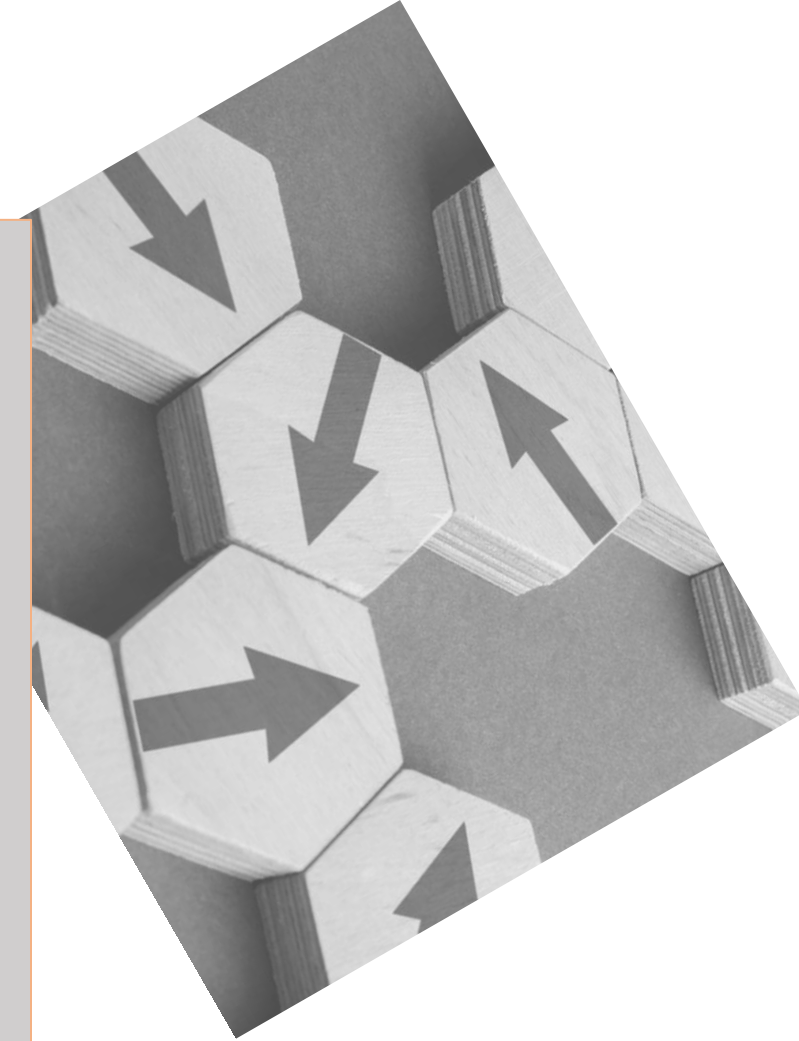
NEO has several purposes

Helps the employee:

- Feel confident about his/her decision to join the organization.
- Build motivation. See opportunities for their own development
- Begin integration into company culture and role.
- Become productive more quickly.

Helps the organization:

- Clarify/reinforce the agency's mission and values.
- Fulfill compliance requirements re. communication of rules, regulations.
- Activate the employee handbook
- Lay a groundwork that can increase retention





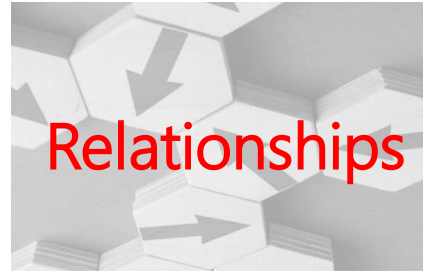
General Objectives

While Day One is important, Days 2 – 60 are just as important.

- Connection
- Culture
- Clarification
- Compliance

Orientation as one part of Onboarding

New Hire Orientation (Day-1)	Onboarding (30, 60, 90+ days)
Equipment, tools including access, office assignment, and materials	Specific on-the-job training/shadowing customized for each role
Required forms for hire (Example: I9, W4, etc.) and compliance training (Example: Sexual Harassment)	More detailed information about the company and their role
Review employee handbook including company benefits	Process for touch point meetings to test proficiency and confirm a culture fit
Other organizational information	Job and performance expectations are being set ideally documented in ADP Workforce (future state)
Introduction to the culture	Optional: Assigned a buddy to support during the 90-day period.
What else?	What else?
What else?	What else?



Include content/activity on these four R's

- **ROLES:** Help the new hire understand the range of roles engaged at the agency. Tie this to the organization's mission.
- **RELATIONSHIPS.** Connect the roles. Include discussion of the agency's relationship to key external partners and stakeholders.
- **RULES.** Code of conduct as well as less formal rules. Tie this to other trainings happening during NEO.
- **RESOURCES:** What's available to the new hire in the way of information and people contacts. Orient the new hire to a company intranet, if applicable. Incorporate the Employee handbook, possibly with New Hire inserts.

Preboarding

- Send a welcome packet, e.g., recent news about agency, fun personal note, gift from the agency, agency directory, organization chart
- Provide information regarding benefits, policies, papers that will need decisions and signing
- Encourage the new hire to view a culture videos with testimonials and day-in-the-life commentary from current employees
- Prepare a draft on-the-job learning plan, i.e., 30-, 60-, 90-day
- Assign a mentor
- Send fun questionnaire to learn about new employee and use it during orientation (with the employee's permission)
- Ensure workspace, uniforms, computer/devices, email address, passwords, etc. are ready



Energizing Your NEO Program

- Encourage asking questions—for Day One and beyond.
- Leave no new hire behind; if off-site employees are involved, they want to feel as connected and valued as those attending in person.
- Offer glimpses into real experiences, real clients and real accomplishments (“home videos” can be a good, low cost tool for this).
- Use video content to craft your message.
- Create personal connections with employee mentors.
- Involve senior leadership.
- Clear a path for success by providing new hires with clear objectives and expectations for the full onboarding period, and beyond.

NEO for very small groups

- Orientation to employee handbook plus paperwork
- New hire welcome packet
- Lunch with manager or team members
- Personal introductions to co-workers, HR and IT staff
- **Shadowing experiences**—pull the new hire into glimpses of real organizational life.
 - Off-site visits
 - Meetings
 - Work sessions
- **Expose the new employee to accomplishments**, especially the types he/she will be involved with



Be sure to plan Day Two, too.

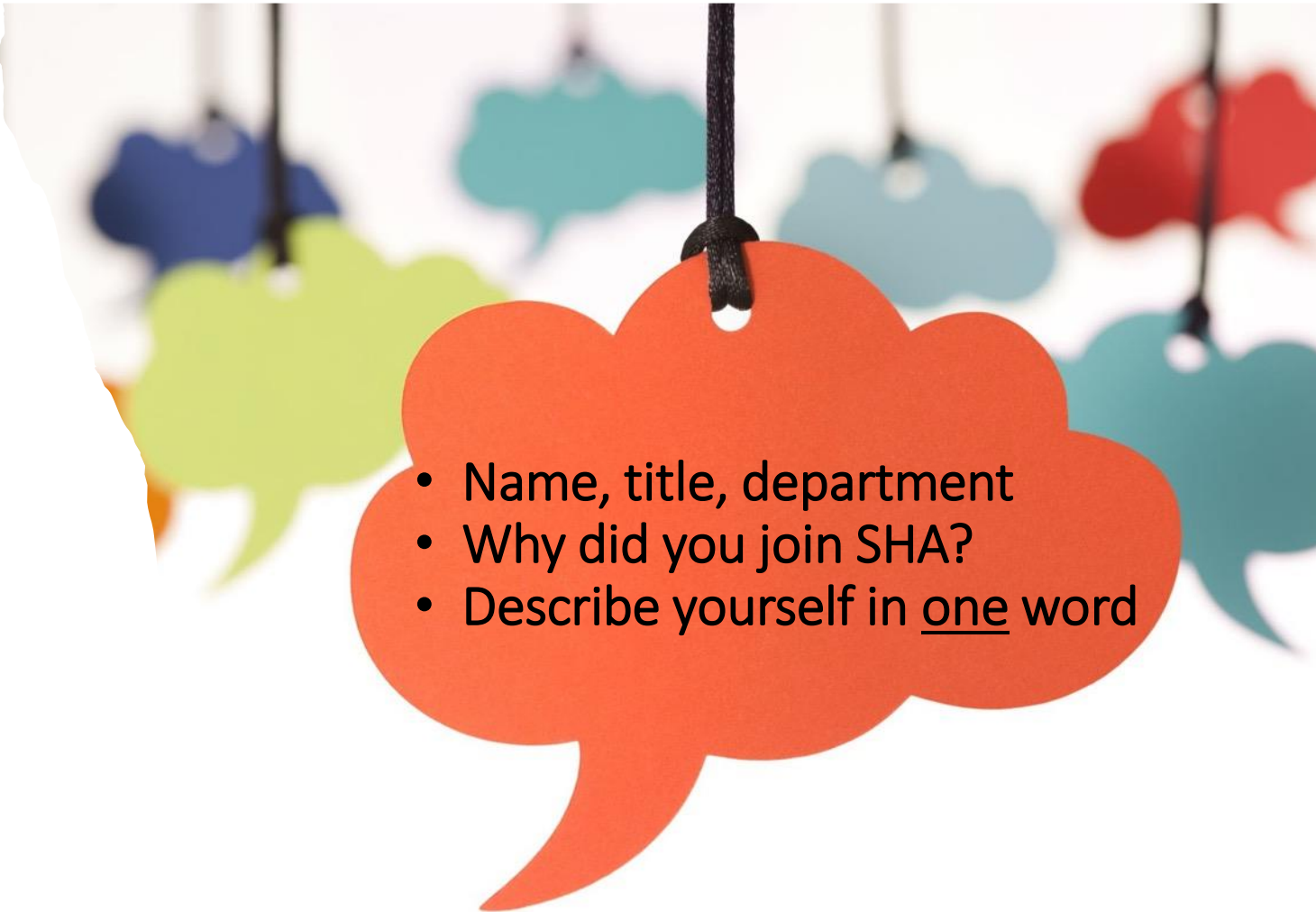
Require orientation and onboarding plans at the departmental and job-specific level!



- While small challenges are expected, normal and OK—don't ask a new hire to dive into the deep end of the pool. Be clear on expectations for their first days and weeks.
- Ensure managers and supervisors have a plan for people to meet, tours to take, files to review, and “starter” work projects.
- Ensure the new hire has health and safety information related to their specific job duties. These become part of the employee handbook.
- Spend time reviewing the job description and specific performance measures.
- **Carefully consider first assignments/projects** to set up new hire for long term success.

Example of New
Employee
Orientation
Presentation:
Sarasota Housing
Authority



- 
- Name, title, department
 - Why did you join SHA?
 - Describe yourself in one word



Let's Get To Know One Another

We Value:

The human dignity in each person

Honesty

Diversity

Curiosity

Healthy stewardship

A collection of colorful wooden human figures in various colors (orange, dark wood, light wood, red, teal) scattered across the left side of the slide.

Our Core Values

Your Benefits

- Paid Time Off
- Holidays
- Medical
- Dental
- Disability
- Life Insurance
- Leaves of Absence



Engaging Activities

- Breakfast/lunch/snacks
- New hire welcome packet
- Trivia questions themed to agency's business
- Pop quizzes with giveaways
- Office/site tours
- Lunch with manager
- "Meet the team" scavenger hunt
- Jeopardy-style quiz game on agency policies/procedures
- Introductions to co-workers



Knowledge Check!



- What are SHA's Core Values?
- In what year was Sarasota Housing Authority founded?
- When does a new team member start earning PTO?
- When is a new full-time team member eligible to participate in SHA's medical, dental, and disability plans?
- When is a new full-time team member eligible to participate in SHA's life insurance plan?
- What is our Open Door Policy?

Small Group Discussion

What 1 or 2 changes to your employee handbook and new hire orientation will you bring back to your agency?



Summary

- Onboarding is a strategic process that can last up to one year depending on the role. NEO kicks off that process.
- An employee's experiences in his first few days and months is crucial to ensuring retention and strong job performance.
- Reference the employee handbook during NEO. Get people's eyes and hands on it.
- Ask yourself:
 - What impression do you want new hires to walk away with at the end of the first day? What about Days 2 and 3?
 - What can you do to "check in" with the new hire on Days 2-30? And beyond.
 - What role will direct managers and co-workers play in the process?
 - What feedback from the new employee will be helpful, and how will you collect it?

THANK YOU!



INSIGHTFUL THINKING. CUSTOM
SOLUTIONS. SUSTAINABLE
RESULTS

Best Practices to Develop
an Engaging Employee
Handbook and New Hire
Orientation



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Core, Proactive Solutions



- STRATEGIC ORGANIZATION DESIGN
- LEADERSHIP/EMPLOYEE TRAINING AND DEVELOPMENT
- TALENT ASSESSMENT AND SUCCESSION PLANNING
- PERFORMANCE MANAGEMENT
- EMPLOYEE ENGAGEMENT AND RETENTION
- HR SURVEYS AND ASSESSMENTS
- HR PROGRAM DEVELOPMENT ACROSS THE EMPLOYEE LIFECYCLE
- EXECUTIVE SEARCH, TALENT ACQUISITION & ONBOARDING
- TOTAL REWARDS (COMPENSATION, BENEFITS & WELLNESS)
- INTERNAL COMMUNICATIONS & EMPLOYMENT BRANDING
- DIVERSITY, EQUITY AND INCLUSION STRATEGIES
- M&A DUE DILIGENCE AND INTEGRATION PLANNING