



## WELCOMING NEW FACULTY - QUICK TIPS

*Everyone has a first day. There are key principles for helping new faculty members make the best start in a new environment.*

*Orientation, sometimes described as “onboarding,” is the stage that follows the significant investment of time and energy involved in the selection of a new faculty member. To the extent possible, the experience should be designed to increase the likelihood that the person will be productive and effective in your department, will enjoy a long tenure, and will build solid relationships early; it should provide new faculty members the best chance of weathering the inevitable challenges of the workplace. Taking the time before the person arrives to plan the first days is a wise further investment of time and energy.*

*Onboarding is used here to include the specific training of the technical elements of the job, and the introduction to the social system and the culture. These tips provide a starting point for such practices, particularly geared towards new faculty members. There are separate tips for new staff members.*

### Be Prepared

1. Find out what your university orientation process for new faculty covers and try not to repeat that exercise. The more your efforts are tailored to the individual and your department, the better.
2. Thoughtfully create and maintain list of what is important for a new faculty member to know for your specific unit and institution; compile this over time, and start a file that can be passed along so those who follow you can benefit from your insights and experience.
3. If you have not been part of the recruitment and selection process, familiarize yourself with the person’s background, research interests, and expectations.
4. Create a written outline of necessary items to do on the first several days and share it with the new person. This could include completing administrative procedures, getting access to buildings, labs, offices, supplies, etc.).
5. Arrange for some of the person’s new colleagues to be available and involved with the welcoming process as much as possible. Include as many key people as practical. This most likely will include a peer faculty member, a senior faculty member, a senior administrator, or all of the above; specify one ‘point person’ from whom the new employee can seek assistance for at least the first few weeks. What you are seeking is to establish clarity, confidence and connection.<sup>1</sup>
6. Collect information on any institutional orientation for new faculty and determine which is the appropriate program for your new colleague; initiate registration for this program as needed and add full time, date, location information to the information packet you provide. If your campus is large or the orientation site is difficult to find, consider taking the new employee there in person.
7. Gather materials in advance where possible such as keys, access cards, login information, work materials, class schedule; location of office, lab; some items may require the person’s signature, in which case part of the schedule can be to have someone walk the new person around campus to the appropriate offices; use the time for a brief tour, perhaps including a lunch or beverage break as well.

INCLUDE KEY  
PEOPLE  
as many as practical

<sup>1</sup> Bauer, Talya. 2016. Connections, onboarding, and the need to belong. re:Work, March 4. Retrieved from <https://rework.withgoogle.com/blog/connections-onboarding-and-the-need-to-belong/>





8. Establish a mentor (or network of mentors) or a method for doing so: your unit may assign mentors in advance, or there may be a process that involves the new faculty member; confirm and document this for the new person, including the role and responsibilities of a mentor vs. the head of department or divisional chair.
9. Keep in mind that some new faculty members may be senior individuals who have been recruited from other institutions, and they may have additional questions, for example about grant and equipment transfer.

## *Create an information resource (written or electronic)*

This document can be referenced by the person upon arrival (or before) and over time. Consider including some or all of the following elements (and see “Explain essentials” below for how some of these are worked into early discussions):

1. Provide a “who’s who” list with contact details. Consider including human resources contacts for resolving paperwork and benefits questions, department administration, how to work with support staff or units to purchase or arrange supplies, graduate and undergraduate coordinators, professional and technical authorities in the unit (eg lab directors, animal care supervisors, government liaisons ...). Having this list in written form (physical or electronic) is important because the onslaught of information in early days can be overwhelming. It will be a useful resource throughout the person's experience at the institution—and could be a useful resource for all members of your unit.
2. Also provide a “what’s what” list that includes acronyms, names, and websites (HR, business office, points of contact at other levels like college, campus, system); your institution may have an official version of this material.
3. Include a “how to” list that includes essential logistical steps (setting up computers, getting moving boxes delivered, visiting HR, keys and access, enrolling for benefits, claiming expenses, arranging purchases ...).
4. Provide information about dates and places for faculty meetings, seminar schedules, coffee hours or other informal gatherings of faculty, etc. (If there are “understood” rules about how these proceed, share them! For example, some departments observe an informal protocol that no one should ask more than two questions in a row of seminar speakers; if you have such protocols or understandings in place, share them with new people so they do not start off on the wrong foot.)
5. Prepare full packet of how annual evaluations are conducted including forms used for periodic reviews, and key policies covering consulting, effort reporting, intellectual property policies, etc.
6. Include list of key training or orientation requirements including websites, times, places, and contact people.
7. It is not too early to give a general overview of grant submission and post-award procedures, including web links to institutional resources.
8. Given that there may be intellectual property issues related to inventions at a previous institution, there should be a brief overview of related institutional policies.
9. Often, faculty will have consulting opportunities; note your institutional guidelines and location of policies.
10. Articulate expectations about administration and logistics: for example, office hours, participation in departmental meetings, and service on committees.

## *On arrival*

1. Have someone waiting to meet the person. This should be the direct supervisor, eg, the department head, in part to emphasize that the new individual is important and valued, and in part to give the supervisor the opportunity to become better acquainted with the individual.





2. Engage with the new faculty member in a relaxed manner, genuinely express appreciation for his or her commitment to join the unit and indicate that you are open to questions at any time. In smaller units, you may wish to provide your mobile number.
3. Confirm the schedule, which will include time for explaining essentials, as below.
4. Introduce him or her to key colleagues and departmental staff to whom the person can turn to with questions and assistance getting settled on campus.
5. Take the person on a short tour of the immediate facilities, including offices, where to get coffee, restrooms, faculty lounge, good spots to get food or snacks, copying facilities, etc.
6. Sit down in a private space together to talk through the prepared information packet, at least touching on each item.

## *Explain essentials*

1. Start off by confirming that the welcome will only be the tip of the iceberg; to avoid the firehose effect, point out where the person can find needed information later, including referencing the prepared packet of information (or web file).
2. Explain how to complete essential administrative steps (setting up systems, visiting HR, keys and access, enrolling for benefits, claiming expenses, arranging purchases ...). It may be useful to take the new faculty member to meet key individuals for assisting with these actions.
3. Describe where to look for:

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  - \* references about how things are done in the unit
  - \* policies and procedures, including the consulting policy, departmental and college by-laws, intellectual property websites
  - \* relevant equipment, and explain how it's supported
  - \* relevant systems, and how they are supported

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4. Talk through who is who in the unit; if it is a large unit or has multiple locations, an organizational chart or map could be useful, pointing out key locations.
5. Explain how and when the person gets paid.

## *Set expectations*

1. Speak about the history of the university and the unit in particular: past research achievements, alumni success, involvement of the faculty in service (society presidents, journal editors, etc.).
2. Articulate a future direction for the unit.
3. Discuss how communication is achieved in the unit (for example the role of email, memos, visiting offices personally and how often), norms for working on site, expectations for office hours, participation in informal unit events, etc.
4. Review the person's job description and responsibilities, including any specific for this particular position: is there a dual reporting line? Expectations for interdisciplinary collaboration? Connections to an outside entity? New course development or service

**SET CONTEXT**  
with information  
about the history of  
the unit and its  
current direction





responsibilities?

5. Outline pattern for reviews and appraisals, referencing the forms that will be used for evaluation; encourage the person to continue or to establish a practice of keeping a spreadsheet or other record of all activities.

## *Set the key next steps*

Outline items that must be completed in the first days or weeks with the checklist or shared electronic document.

1. The person should update this as required items get completed.
2. Schedule a follow-up meeting with the person in three months to review process and answer questions.
3. Arrange a review at the end of a given period; a key question is “what else would have been useful to know when you joined?” This then completes the loop of continuous refining and improvement of this process.
4. Establish a process for monitoring and communicating; too often new faculty struggle in the first days or weeks; indeed, part of the initial monitoring can be a determination of how much support the person may need even over a matter of months or years.

Bear in mind that the new faculty member may not have only work-related questions: settling into a new location may raise a host of issues, for the new colleague and also for any partners or family members. Some thoughtful reaching out and support on that front can also be helpful and welcome.

