



Metropolitan
LIBRARY SYSTEM

New Manager Onboarding Checklist

Name _____

Library _____

Start Date _____

Prior to 1st Day

Mark date complete	
	Schedule a half day to meet new hire at location and begin onboarding on first day in library
	Review Supervisor New Hire Checklist from HUM
	Collect codes for specific library location <ul style="list-style-type: none"> • Safe • All local door codes • Request local door keys/fobs from MTC if needed
	Request RD add employee to appropriate SharePoint sites <ul style="list-style-type: none"> • Local Staff Group (LM) • Local Management Team (LM) • Guest Services Managers • Library Managers (if LM) • Library Management Team • Access Managers • Assistant Library Manager (if LM or ALM) • All Engagement Staff • All Access Staff • Programmers – Children, Adult, Teen • XChange
	Create ScheduleAnywhere login and set appropriate permissions
	Determine and request financial logins needed – Martus, IntAcct, Staples, Amazon
	Assign a workspace and phone number for new hire
	All Correspondents email drafted <ul style="list-style-type: none"> • New LM's – sent by CGO • New Assistant Library Managers and AML's – sent by RD
	Email new hire with supervisor contact information and welcome and announcement email draft for their review
	Send email to the library staff introducing new manager
	Ensure there is a plan for covering the rest of this document, including staff assigned to orientation topics

1st Day at Library

Mark date complete	
	Welcome & Introductions – Direct Supervisor
	Library Tour & facility/grounds overview <ul style="list-style-type: none"> • Where to park • General tour, introductions to staff
	Provide: <ul style="list-style-type: none"> • Security alarm code • Fobs (if not given at NEO) • Keys – to desk, master keys, restroom maintenance • Access to safe
	Workspace/Lockers/Personal Space
	Review checklist from HUM for Supervisor New Hire for incomplete items
	Log into all needed software (*app available) <ul style="list-style-type: none"> • Computer • Email/Office 365* • ScheduleAnywhere* • LibraryMarket • PITS • Security Camera access • IntAcct, Staples, Martus - varies by employee • Intranet • CARL • Paycom* – employee and supervisor • Tableau login • Metro Service Portal
	Review manager role in: <ul style="list-style-type: none"> • Behavior in the Library • Emergency closing procedures
	Review <ul style="list-style-type: none"> • Call in procedure • Dress code • Schedule for first two weeks/month

Mark date complete	
	<ul style="list-style-type: none"> • Job description
	<p>Time clock for non-exempt employees</p> <ul style="list-style-type: none"> • Approving timecards • Approving time off • Change punch requests • Reviewing employee last punch • Rescanning fingerprints for employees
	<p>Contact information</p> <ul style="list-style-type: none"> • For direct supervisor • All RDs and CGO cell numbers – when to call • Sharing the employee's number with LM and RD • Reciprocally share Outlook calendars
	<p>Provide link for business cards</p> <p>https://metrolibrary.wufoo.com/forms/qwa64fk17fpk72/</p>
	<p>Employee to read all SH/HUM policies by the end of week</p>
	<p><i>Continue</i> New Supervisor Checklist from HUM</p>

Priority I Topics

Direct supervisor only

Mark date complete	
	In-depth Facility Tour <ul style="list-style-type: none"> • Panels/breaker box • Security alarm • Flags • Fire alarm
	Branch specifics <ul style="list-style-type: none"> • Branch history (origin, remodels, staffing) • Ongoing projects • Strategic vision for the location • Connections with the community/city • Relationships with first responders • Get to know your community – eat/shop/etc.
	Performance Development overview <ul style="list-style-type: none"> • Scheduling and conducting 1:1's • Semi-annual and annual appraisals • Documenting in Paycom • Personnel management transition – challenges and strengths on the team • Supervisory team expectations
	Schedules & Scheduling <ul style="list-style-type: none"> • Monthly and desk schedules • Scheduling best practices <ul style="list-style-type: none"> • How many people can be off at a time • Number needed for opening/closing • LIC options • Requesting help from other libraries • Closing shift options, leaving together • Mon-Sun work week • Deadlines <ul style="list-style-type: none"> • Publishing schedules • Approving timesheets • Requesting and approving time off

Mark date complete	
	<ul style="list-style-type: none"> • Printed timesheets • Adding and removing employees from SA • AWOL – leave earning vs non-leave earning usage
	<p>Personal schedule</p> <ul style="list-style-type: none"> • Working schedule – include evenings and weekends, will vary • Outlook Calendar <ul style="list-style-type: none"> • Keeping up to date • Noting late days and off days • MLS Training calendar • Requesting leave • ScheduleAnywhere • Library Leave Guidelines
	<p>Behavior in the Library/PITS</p> <ul style="list-style-type: none"> • Entering incident reports, timely with details • Incident descriptions as a legal document • Customer privacy • Reviewing incident reports • Follow up actions • Local authority and forwarding ban requests
	<p>Access & Engagement in libraries</p> <ul style="list-style-type: none"> • Customer service • Access duties • Engagement duties • Collaborative work
	<p>Job Shadowing</p> <ul style="list-style-type: none"> • Working the desk • Backroom processes • Attending programs (optional for AML's) • Opening and closing procedures
	<p>Maintenance department</p> <ul style="list-style-type: none"> • Submitting work orders • Role of Maintenance vs employees • Role of City in facility maintenance • Facility changes – requests and process • Emergencies, work prioritization

Mark date complete	
	<ul style="list-style-type: none"> • Carpet cleaning
	Budgeting <ul style="list-style-type: none"> • Martus (LM's only) <ul style="list-style-type: none"> • Finding current year information • IntAcct <ul style="list-style-type: none"> • Approvers and submitters • Department dashboard/YTD amounts • Shopping and purchasing procedures • Staples/Amazon • Budgeting timeline and requests • FFE, IT, Marketing • Conferences • Mileage
	Manager SharePoint <ul style="list-style-type: none"> • Access Managers • Assistant Library Managers • Guest Services Managers (LM's only)
	LMS <ul style="list-style-type: none"> • Running reports
	Pests in the Library
	Expectations for attending meetings <ul style="list-style-type: none"> • MLS Commission • Engagement Cabinet • Guest Services Managers • XChange • Local team meetings – Access, Engagement, local leadership • Regional meetings
	Community involvement <ul style="list-style-type: none"> • Representing the organization and who to send • Chambers of Commerce • City council • School visits/community events • Evaluating frequency and diversity of involvement • Recognizing and interacting with MLS Commissioners

Mark date complete	
	Policy & Procedure – Values
	Emergency procedures <ul style="list-style-type: none"> • Weather • Earthquake • Fire, location of fire extinguishers and exits • Bomb threat • Code Adam • Utility outages
	Human Resources Policies <ul style="list-style-type: none"> • 120 – Hours, Overtime, Meal breaks • 130 – Attendance and Tardiness • 220 – Employee Leave • 410 – Discipline Policy & Procedures • 500 – Rights of Employees • 600 – 610-660 in general
	Guest Experiences Training
	Continue HUM's Supervisor New Hire Checklist

Priority II topics

Supervisor only

Mark date complete	
	Safety <ul style="list-style-type: none"> • Quarterly facility checklist • Safety training • SDS manual • Customer/volunteer accident reports • Employee first report of injury, worker's comp nurse line
	Security department <ul style="list-style-type: none"> • Surveillance system • Contract security • Security employees, contact info

Mark date complete	
	<ul style="list-style-type: none"> • Urgent or emergent security issues • Security alarms • Panic buttons • Calling 911 • Writing trespass tickets
	Organizational Structure
	Department Roles <ul style="list-style-type: none"> • Collection Services and Development <ul style="list-style-type: none"> • Collection Development • Collection Services • Collection Processing • Business Office • IT • Outreach • CIS
	Start setting up meetings with Department Leaders
	Marketing Requests
	Engagement topics <ul style="list-style-type: none"> • Reference P&P • Readers' Advisory • Technology Help • Inter Library Loan (ILL) • Library Displays/Passive Programming • Planning, Hosting, & Evaluation of Programs • Outcome Based Planning & Evaluation (OBPE) • Community Needs Assessment • OES Department • LibraryCalendar software • Deadlines <ul style="list-style-type: none"> • Attendance • Program entry and review • 5160
	Access topics <ul style="list-style-type: none"> • Circulation • Library Accounts

Mark date complete	
	<ul style="list-style-type: none"> • Backroom • Inventory • Reports and days to run • Policies and Procedures – AL, AM, AS • What does and doesn't go in the safe – bags • What happens with money not in the POS
	<p>Hiring process</p> <ul style="list-style-type: none"> • Employee requisitions • Open position requests <ul style="list-style-type: none"> • Requesting a change in open position • Employee Separation of Employment • Application review, video interviews, in person interviews • Working HUM/Recruitment • Onboarding and welcoming new employees • Staffing model
	Collection Management
	Shelving Training
	<p>Volunteers</p> <ul style="list-style-type: none"> • Review Volunteers at the Metropolitan Library System- NEO in MetroU • Talk about roles involved with volunteers and expectations
	<p>General Advice</p> <ul style="list-style-type: none"> • Try things • Be prepared for anything • Be persistent • Be willing to do all jobs – everything is your job • Don't be afraid to fail • We've all been there • Living in the gray • Own the 'no' • Act with best intentions • Don't be afraid to ask for help <ul style="list-style-type: none"> • Who to ask and how • Finding a mentor

Delegable topics

Trainer assigned	Date covered	
		Room Reservation System <ul style="list-style-type: none"> • Study Rooms, if applicable • Makerspace, if applicable • Meeting Room rates, exempt organizations • CIS role • Onsite reservations • Room setup options and responsibilities • Payments and refunds
		Volunteers – systemwide – Volunteer Coordinator
		Safe Place – watch training video first; supervisor or Safe Place expert to cover
		Volunteers - local
		Library Intranet Introduction
		Kitchen Etiquette
		MLS Staff Directory
		Local OneDrive & Shared Drives Introduction
		Library facility introduction – where things are stored
		Lost and Found
		Delivery
		New book display
		Missing/Lost/Damaged item process
		Opening procedures

Trainer assigned	Date covered	
		Using Fill List
		Children's programs
		Teen programs
		Adult programs
		Closing procedures
		Assisting customers with technology, computer reservations and printing
		Reader's advisory
		ILL's
		Collection responsibilities
		Donations
		Periodicals

Employee signature_____
Date_____
Supervisor signature_____
Date