



**RECOMMENDED PEER ONBOARDING PROCEDURES**  
(NOT ALL MAY APPLY TO VOLUNTEERS)

ON START DATE (HR/PROGRAM MANAGER)	
TASK	COMPLETION DATE & INITIALS
<input type="checkbox"/> Provide orientation binder and onboarding materials; complete necessary paperwork <ul style="list-style-type: none"> <li>▪ Peer job description</li> <li>▪ Employee handbook and other agency policies/volunteer code of ethics</li> <li>▪ Direct deposit form</li> <li>▪ W-4 form</li> <li>▪ I-9 form (W-9 for volunteers)</li> <li>▪ Cultural competence statement</li> <li>▪ Sexual harassment brochure: <a href="https://www.dfeh.ca.gov/wp-content/uploads/sites/32/2018/12/DFEH_SexualHarassmentPamphlet.pdf">https://www.dfeh.ca.gov/wp-content/uploads/sites/32/2018/12/DFEH_SexualHarassmentPamphlet.pdf</a></li> <li>▪ Payroll, timesheet, and holiday calendar</li> <li>▪ Staff roster/org chart (updated w/new hire info)</li> <li>▪ Benefits paperwork</li> <li>▪ Employee emergency contact form</li> </ul>	Initials: Date:
<input type="checkbox"/> Conduct agency-specific orientation, covering: <ul style="list-style-type: none"> <li>▪ Organization’s history, mission, vision, and values</li> <li>▪ Current services and programs and how peer role fits into existing structure</li> <li>▪ How things are done (important policies and procedures)</li> <li>▪ Who peer works with, reports to, how information is shared, how performance is evaluated</li> <li>▪ Data security protocols</li> <li>▪ Documentation and record-keeping requirements</li> </ul>	Initials: Date:
<input type="checkbox"/> Copy the following documents and keep on file with other necessary paperwork: <ul style="list-style-type: none"> <li>▪ Driver license/government-issued ID</li> <li>▪ Social Security card/authorization to work info</li> <li>▪ Auto insurance policy (if driving)</li> <li>▪ DMV report</li> </ul>	Initials: Date:



**ON START DATE (HR/PROGRAM MANAGER)**

TASK	COMPLETION DATE & INITIALS
<input type="checkbox"/> Determine trainings New Hire will need, <b>create training plan</b> , and schedule trainings (after consulting budget).	Initials: Date:

**IN FIRST 30 DAYS (PROGRAM MANAGER)**

TASK	COMPLETION DATE & INITIALS
— Meet with New Hire to review their job description, supervision forms, and the employee onboarding information (which includes performance evaluation template) to ensure New Hire understands agency and program expectations for their position	Initials: Date:
— Meet with New Hire to determine how things are going with the job and work environment to identify potential problems and prevent future employment issues. For example: <ul style="list-style-type: none"> <li>▪ What do you like about the job and our agency?</li> <li>▪ What's been going well so far?</li> <li>▪ Do you have enough, too much or too little time to do your work?</li> <li>▪ What can we do to help you become successful in your job?</li> <li>▪ What, if anything, do you not understand about your job or our agency?</li> <li>▪ Who do you talk to when you have questions about work? Do you feel comfortable asking?</li> <li>▪ Are we clearly communicating our expectations to you?</li> <li>▪ How are you getting along with your coworkers?</li> <li>▪ How do you see yourself developing in this role?</li> <li>▪ What are your professional goals and how can we help you accomplish them?</li> </ul>	Initials: Date:
— Complete this checklist and forward copy to Executive Director and HR Manager	Initials: Date:





**FIRST 90 DAYS AND BEYOND (PROGRAM MANAGER)**

TASK	COMPLETION DATE & INITIALS
<p>— Conduct occasional check-ins with non-peer staff to determine how things are going, explore potential issues, and prevent future problems. Questions for non-peer staff may include:</p> <ul style="list-style-type: none"> <li>▪ Do you understand the peer role? What questions do you still have? §</li> <li>▪ What's going well?</li> <li>▪ What could be going better?</li> <li>▪ How are you getting along with peer(s)?</li> </ul>	<p>Initials: Date:</p>
<p>— Ensure peer has frequent contact with other peers to prevent cooptation and dilution of peer role</p>	<p>Initials: Date:</p>

