

President's Management Council  
INTERAGENCY ROTATION PROGRAM

### Rotation Onboarding/Orientation Checklist

#### **PRE-BOARDING – Agency POC/HR Office** (14-21 days prior to the arrival of the rotation participant)

- Identify agency POC who participants can contact if needed
- Ensure the supervisor and all appropriate personnel are aware of the participant start date
- Send pre-arrival information and forms to participant
- Arrange for appropriate security clearance and building badge

#### **PRE-BOARDING – Host Supervisor** (14-21 days prior to the arrival of the rotation participant)

- Complete rotation agreement to gain necessary approvals for rotation
- Call to congratulate rotation participant, confirm start date and answer any questions
- Contact participant's home supervisor to introduce yourself and coordinate regarding the rotation
- Identify a sponsor/buddy for the participant; ask him/her contact participant prior to arrival to welcome him/her
- Communicate regularly to ensure the participant continues to be engaged and excited about the position
- Ensure the participant understands what will happen the first day and what time to meet the supervisor
- Alert current staff of the participant's arrival and discuss the person's role, skills and workspace
- Prepare participant's workspace, including phone, computer, email and access to systems or equipment

#### **ORIENTATION** (14-21 days prior to start of rotation)

- Cohort participants, home supervisors, host supervisors, and agency POCs gather to learn about the program
- Agency POCs provide overview of program, details about roles and responsibilities, and cohort schedule

#### **DAY ONE – Host Supervisor and Participant**

- Supervisor meets and personally welcomes participant, before initial in-processing if possible
- Conduct in-processing by knowledgeable staff who can answer participant's questions; include information about business continuity, shelter-in-place, and emergency plans
- Conduct tour of building and provide information on neighboring resources
- Introduce participant to office sponsor/buddy and other staff members
- Take participant to lunch (if allowable)
- Provide detailed information about rotational assignment
- Establish work schedule; discuss telework and work schedule options (if any)
- Participant provides emergency contact information to supervisor
- Conduct end of day debrief

#### **ONBOARDING PHASE I – Host Supervisor** (occurs within first 7 calendar days of rotation)

- Provide information on agency policies and procedures as well as communicate the culture of the agency and the participant's specific work unit
- Discuss and issue performance expectations and schedule 30-day feedback session
- Provide applicable training relating to ethics, computer security, safety and agency-specific training

#### **ONBOARDING PHASE II – Host Supervisor** (occurs within first 30 days of rotation)

- Provide participant with knowledge of organizational resources (e.g., historical files, knowledge management)
- Conduct regular informal performance review/check-in
- Schedule a shadowing assignment with a member of agency leadership
- Coordinate gathering for cohort participants within the agency, to facilitate networking