

Internal Transfers at **BETHEL**

Everything an employee and supervisors need to know



Included here are instructions for the:

- Employee transferring to a new role (p. 2)
- Current Supervisor of transferring employee (p. 3)
- Future Supervisor of transferring employee (p. 4)

Questions? Contact the Office of People and Culture

instructions for employee

Communication

Once hired into a new role at Bethel, please follow this communication or notification cascade in order.

The order is important. Please contact:

- current supervisor
- those you supervise
- your team members
- key departments/colleagues you work with in this role
- external constituents/partners/vendors/etc.
- student employees you supervise
- other colleagues at Bethel



Meet with Current Supervisor

In this meeting, please discuss the following:

- status of all current projects
- time sensitive tasks associated with role
- processes essential to your role and
 - recommendations on how to keep these going in the interim
- the training manual / standard operating procedures for your role

If moving into a benefits eligible role

- Meet with the Benefits Administrator in OPC to learn about benefits
 - Complete benefits enrollment forms

If moving from hourly (non-exempt) to salaried (exempt)

- Meet with OPC People Relations Specialist to discuss:
 - Vacation accrual
 - Submitting a monthly leave report instead of time sheet

If moving into a supervisory role

- Meet with the OPC Business Partner to discuss manager training available to you via:
 - EMBARK, EQUIP and ELEVATE

Logistics to complete

- Clean out current office
- Return office and desk keys to supervisor
- Transfer ownership of Google files to colleague
- If applicable, add text to email signature communicating your last day in this role and
 - who the future contact will be (if known)

instructions for **current supervisor**



Meet with departing employee

- Discuss status of current projects
- Request the employee's updated training manual / standard operating procedures for their essential functions
- Discuss a team goodbye lunch/event & if this is desired
- If applicable, discuss how the departing employee is handing off their direct reports and to whom

Meet with employee's new supervisor

In this meeting, please discuss the following:

- Transition: end date in your area & start date in theirs
- Ongoing projects the employee is wrapping up
- Opportunity for employee to return and provide training to new hire
 - Discuss if possible
 - How much time might be needed and when this might occur

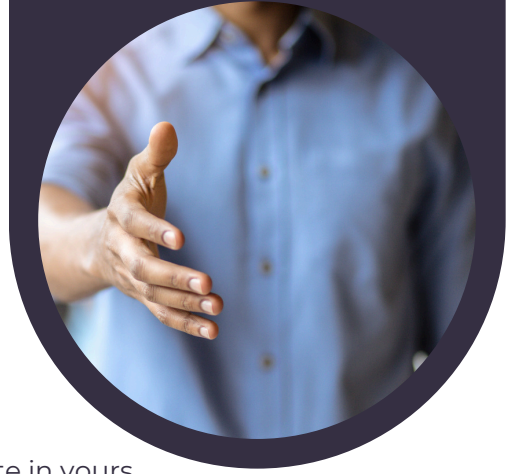
Meet with Business Partner in OPC (optional)

Discuss any questions or concerns you have prior to employee's departure

Logistics to complete

- Plan team goodbye lunch/event - funding will come from your budget
- Secure office and desk keys
- Secure department credit card & return to Business Office
- Contact Security and Safety and provide date the employee's ID access to your area changes
- Confirm that employee has not simply shared Google work product, but has transferred ownership to another person/email in your area
- Remove employee from webpage
- Remove employee from existing team drives/shared folders
- Remove employee from existing team meetings in Google Calendar (gCal)

instructions for future supervisor



Meet with employee's current supervisor

In this meeting, please discuss the following:

- Transition: confirm end date in their area & start date in yours
- Ongoing projects the employee is wrapping up
- If there is a need for employee to return and provide training to new hire
 - Discuss if this possible
 - How much time might be needed and when this might occur

Preparations to complete

- Meet with new employee & let them know what to expect their first week. Include:
 - Start time in area, office hours, general team expectations/practices, etc.
- Add new employee to existing team meetings in gCal
- Add new employee to shared team folders in Google & other team apps/software/systems
- Contact IT regarding computer/technology needed
- Contact Facilities Management if office/cube needs attention
- Contact Security & Safety regarding new employee ID access to your areas
- Order name badge, name plate for office door, and business cards (if applicable)
- Plan team welcome lunch for first day
- Plan Team Building opportunities within first few months
- Create timeline or overview of job specific training that needs to occur with new employee

Integrating your new employee into your area

Day One

- Provide welcome which may include card, lunch, team introductions
- Connect new employee with key partners across university
- Office tour
- Review job description & responsibilities
- Discuss timeline and overview for job specific training
- Establish 1:1 meetings (time, day, frequency)

First three months

- Discuss Best Christian Workplace team action item & progress being made
- Confirm Cultural Intelligence training has been completed & discuss team cultural values as team
- Discuss employee's desired Work From Home (WFH) arrangement, document, and submit to OPC
- Provide a 45 and 90 day review