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**[Bank Name]**

**Onboarding Passport**

A culture guide for interns to learn

about our organization.

[Bank Logo]

**Introduction**

Welcome to [bank name]! You are now a part of the team. This passport guides you through the full internship onboarding process here at our organization to acquaint you with all aspects of our company and your internship.

These components do not have to be done in order, but they all need to complete for your onboarding journey to be officially finalized. The expectation is that you will finish these requirements by [date decided upon by the bank]. Certain situations may require a longer timeframe. As each item is completed, your mentor/supervisor or the appropriate person will [initial/place sticker/etc.] in the circle provided below each item. Please feel free to reach out to your mentor/supervisor or HR with any questions or concerns through this process.

[Include mentor/supervisor contact information.]

[Include HR contact information.]

[Bank Logo]

**MEET WITH:**

Mentor/Supervisor on Day One

Meet with your direct mentor/supervisor for [a meet and great, building tour, necessary paperwork, passing out of any supplies and/or technology, etc.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

You will also begin to review the [insert any bank specific information, resources, and/or documents here] as well as discuss the job description, expectations, and the mission of our organization and how the internship position fits into that mission.

You and your mentor/supervisor will set up a schedule to meet throughout the summer. The mentor/supervisor relationship will last the entirety of the summer and provide you an opportunity to ask questions and freely voice ideas for guidance and insight.

[Insert any other bank specific information here.]

**MEET WITH:**

I.T.

Meet with a representative from the I.T. department and cover the following points:

* Receive all needed equipment.
* Review equipment usage information.
* Sign off on any agreements needed.
* Review password requirements.
* Discuss any specialty equipment items.
* Discuss any virtual/remote work capabilities needed.
* [Insert any other bank specific information/tasks here.]

[Insert any other bank specific information here.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**MEET WITH:**

Human Resources

Meet with an HR associate to discuss the following:

* Establish and agree upon working hours.
* List of key contacts of where to find help (I.T., HR, etc.).
* Review of employer expectations and job description.
* Review of company policy and safety policies.
* Review of the company dress code.
* Review emergency and safety procedures.

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

* [Insert any other bank specific information/tasks here.]

[Insert any other bank specific information here.]

**MEET WITH:**

[Insert any other bank specific meetings here.]

[Include any details of any other meetings the intern will have during their onboarding. Delete this page if not needed.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**ATTEND:**

VBA Internship Program Intern Orientation

May 23, 2024 | 10:00 a.m. – 3:00 p.m.

As an intern at our bank, you will participate in the Virginia Bankers Association (VBA) Internship Program. Through this program, you will work on specific requirements to earn the VBA Certificate of Completion including:

* Complete an American Bankers Association (ABA) online training course OR equivalent online banking industry training.
* Complete a capstone project and presentation.
* Participate in at least one of the in-person events (Intern Orientation or Mid-Summer Meet Up) and at least three of the virtual VBA events.
* Involvement in a community support or volunteer opportunity (banks will determine specifics of this based on opportunities throughout the summer).
* Complete the VBA Internship Program self-evaluation.

You will learn more about each of these requirements during the Orientation. After the Intern Orientation, you and your mentor/supervisor will discuss the specifics around the program requirements.

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**ATTEND:**

[Insert any other bank specific events here.]

[Include any details of any other events the intern will have during their onboarding. Delete this page if not needed.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**REVIEW:**

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

Summer Timeline & Other Resources

During the onboarding process, please review the following:

* Internship summer timeline
* Bank’s website and social media platforms
* VBA Internship Program Resources website (after the Intern Orientation on May 23)
* Information on the bank’s history
* List of common banking acronyms
* [Insert any other bank specific documents the intern must review here.]

**COMPLETE:**Internship Program Goal Setting & Agreement

During the first part of your internship, you will meet with your mentor/supervisor to set goals for the summer experience. During this meeting you will discuss the following:

* How your performance will be evaluated
* Your expectations for the experience
* The bank’s expectations for the experience
* Different projects/tasks that you will be assigned
* Any college/university requirements for the internship (if applicable)
* Establish objectives, desired outcomes and/or areas of responsibility for the internship experience
* [Insert any other bank specific information here.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**COMPLETE:**

Intern Week One Activity Report

Throughout the summer, you will be asked to complete a brief weekly activity report. These reports will be submitted to your mentor/supervisor. On this report, you will be asked the following questions:

* Briefly summarize your work assignments since we last met.
* What specific insights have you gained in the past week?
* List any new ideas you have for our business. What next steps would you propose?
* Are there any challenges, issues, or concerns that you are currently experiencing?
* [Insert any other bank specific information here.]

This report will simply be a conversation starter during the weekly check-ins between you and your mentor/supervisor.

[Delete this page if your bank is not planning to have the intern complete weekly activity reports.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**COMPLETE:**

Email Your Capstone Project Topic to the VBA

Throughout the summer, you will be asked to complete a capstone project and presentation on [a banking industry topic]. This project will be due by a date agreed upon by the bank and intern.

Your mentor/supervisor will discuss the details of this project with you. Once a topic has been selected, please email that topic to Monica McDearmon at the VBA (mmcdearmon@vabankers.org).

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**COMPLETE:**

[Insert any other bank specific training/online training.]

[Include any additional details on bank specific training here. Delete this page if there is no additional training during the onboarding process.]

Have the appropriate person initial in the circle once completed. Date completed: \_\_\_\_\_\_\_\_\_\_

**CONGRATULATIONS!**

You have successfully completed the onboarding process at [bank name]! Though the fun does not stop here, by now you should be well acquainted with your organization!

Please have your mentor/supervisor send an email to HR that you have completed your passport. If you should have any questions, please reach out to your mentor/supervisor or to any HR associate. We hope you enjoy your summer experience at [bank name]. Thank you!

[Include mentor/supervisor contact information.]

[Include HR contact information.]

[Bank Logo]