LEADERS' GUIDE TO ONBOARDING

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Ryerson University

Human Resources

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Did you know that 4% of employees leave a job after a disastrous first day and that every salaried employee that leaves costs the organization up to 150% of their annual salary?

– Reed Consulting Company, 2005

INTRODUCTION

Onboarding is a shared responsibility with activities managed by the hiring department/faculty, Human Resources and, in some cases, e.g. for faculty, the Learning and Teaching office and Office of the Vice Provost, Faculty Affairs.   You play a critical role in facilitating the successful integration of new employees into Ryerson's community.   Hiring the right person at the right time is only the first step in the onboarding process, which goes well into the first year of employment.

Leaders are individuals who guide others toward a common goal, creating an environment in which other team members feel actively involved in the entire process. Managers plan, organize and coordinate.

This guide will help hiring leaders capitalize on the opportunity to facilitate the seamless integration of new employees while they are most highly motivated toward learning and contributing. It provides an overview of the importance of onboarding, best practice guidelines and tips/tools that will assist in a smooth and successful transition. It also discusses the responsibilities of leaders in this process, such as informing new employees about reporting absences, hours of work, and access to computer accounts, to name a few. These planned activities will allow you to engage and develop new employees to ensure not only their success, but also the success of the department/faculty.

WHAT IS ONBOARDING?

Definition[i]
Onboarding is the process of performing all the organizational actions that support new employee integration. It is an initiative that helps new employees perform better in their role, sooner.   Onboarding occurs in the period between offer acceptance and full integration into the Ryerson community. These actions include:

- Creating a positive new hire experience
- Preparing the workspace, setting up user accounts, completing paperwork etc.
- Defining job responsibilities and performance objectives
- Describing policies, processes and procedures
- Explaining the culture of the University and "how things work around here"
- Explaining the department or faculty and how it fits in the University
- Giving early verbal performance feedback
- Providing strong coworker support

Orientation vs. Onboarding

Orientation is an event; onboarding is a process.

Orientation is a structured event that focuses on the information the new employee needs to know to get started, such as an introduction to the organizational structure, policies, and procedures. It is one piece of the onboarding process. Onboarding however can last anywhere from 3 months to a year, depending on the responsibilities of the position and the amount of organizational understanding necessary to be successful in the role. The goal is to align new employees with Ryerson's culture, mission, and values, and focuses on strengthening the employee's connection to the organization and its people. It provides a more strategic plan for employee success than orientation alone.

Benefits of Effective Onboarding[ii]

Best practice organizations show that well-planned and organized onboarding programs:

- ✓ Increase *productivity* and *retention*
- ✓ *Reduce anxiety* and stress for the new employee
- ✓ *Reduce* new hire *turnover*
- ✓ *Prevent* future *spending* on re-recruiting and re-training
- ✓ Foster *employee engagement* (which drives *discretionary effort)*

In addition, an onboarding program will assist the new employee to:

> **What is Discretionary Effort?**
>
> Discretionary Effort is the employees' willingness to go "above and beyond" the call of duty, such as helping others with heavy workloads and looking for ways to perform their jobs more effectively.
>
> *Corporate Leadership Council, "Driving Performance and Retention Through Employee Engagement", 2004*

- Be successful in their jobs and make immediate contributions by understanding their role and responsibilities;
- Contribute to the success of the faculty/department by understanding the impact of their role
- Integrate into the culture of Ryerson (both formal and informal); and
- Feel genuinely welcomed and believe that their entry into the University was handled professionally, with care, and that they "made the right decision".

Did you know that participants of structured on-boarding programs were 58% more likely to be with the organization after 3 years?

– Wynhust Group 2007

RYERSON'S ONBOARDING PROCESS

Pre-Arrival	New Hire Orientation (first week)	Dept/Faculty On-boarding (first 3 months)	On-going On-boarding (3 plus months)

- Complete hiring leader's onboarding checklist
- Assign an onboarding colleague
- Set-up work space and systems
- Gather supporting documents

- One-on-one meeting with leader to get to know one another
- Meeting with HR (forms and benefits overview, eHR)
- Introductions and meeting with team
- Review of department and Ryerson

- Complete all necessary training
- Meet regularly with employee to review job expectations and provide feedback and support
- Attend Ryerson's New Employee Orientation

- Continue to meet regularly with employee
- Interim review is conducted as appropriate i.e., between 3 and 6 months
- Probationary review is conducted as appropriate

ROLES AND RESPONSIBILITIES

Onboarding is a shared responsibility with activities managed by the employee, hiring department/faculty and Human Resources. The role of the hiring leader will be explained further in the next section.

New Employee	Hiring Department/ Faculty	Human Resources/ LTO/Vice Provost, Faculty Affairs
- Completes any necessary training. - Submits completed new employee documentation. - Attends Ryerson's New Employee Orientation and any other group specific workshops i.e., Faculty Orientation	- Ensures workplace is set up and clean. - Requests appropriate technology access and equipment. (www.ryerson.ca/ccs) - Conducts departmental welcome and introductions.	- Processes new employee documentation. - Coordinates and facilitates Ryerson's New Employee Orientation. - Meets with new employee on the first day to review the new

(http://www.ryerson.ca/lt/progr ams/new_faculty/).	• Conducts Check-in Interview	employee package and answer general questions.

ROLE OF THE HIRING LEADER

As the hiring leader, you are the most influential person in the onboarding process. You are the link that integrates new employees into the organization and by now you are aware that finding good employees is a difficult and time-consuming task. As their leader, your key responsibilities are to:

1. Clarify Job Expectations

- Review together the job duties (as outlined in the official job description or in the applicable collective agreement) and expectations (more specific than the details in the job description).

- Ensure the new employee understands how to translate expectations into their day-to-day activities and how their role impacts the department/faculty's strategic priorities.

> **TIP:**
>
> *Do not assume that the new hire knows exactly what they were hired to do.*

2. Manage Performance and Provide Support

- Schedule regular meetings to provide ongoing direction and support.

- Provide feedback (both positive and constructive) on their performance and identify support and resources to bridge any gaps.

- Address any performance concerns immediately – do not wait and see (for assistance, contact your Human Resources Management Consultant (HRMC) http://www.ryerson.ca/hr/about/client_services_team.html).

> **TIP:**
>
> *Do not just assume that the new hire is okay if they are not asking questions.*

3. Ensure Ongoing Communication

- Provide an overview of the University's plan and the department/faculty strategic priorities and Academic Plan. Talk about the University's culture and history. Provide personal stories on your positive experiences.

- Discuss preferred management, communication and decision-making/problem-solving style.

> **TIP:**
>
> *Get to know and understand the employee's expectations.*

TIPS FOR HIRING LEADERS [iii]

Onboarding is:	Leaders Tips	Tools/Links
A process, not an event	Onboarding can be overwhelming for new employees, even those with experience. Keep close contact to make sure things are going well. Use the onboarding checklist in this guide so employees know what to expect, and prepare a schedule.	Hiring Leader's Onboarding Checklist Schedule Template
A team effort	Get buy-in and involvement from all members of your team. Use an "onboarding colleague" to assist with the transition. Remember that the new employee also has a role and responsibility in making the onboarding process a success.	Onboarding Colleagues – Includes tips and a checklist
Planned and structured	Time invested upfront in planning onboarding activities will develop your new employee faster. The plan should be consistent and able to be reproduced for all new employees. Remember to mix strategies – use observations, presentations, demonstrations, practice – and be flexible enough to be able to meet individual needs. New employees may move through the process at different speeds and in different ways. Document the process while it's happening and evaluate the effectiveness of onboarding after.	Check-in Interview
About more than filling a job	Introduce the new employee to colleagues and key stakeholders. Discuss the formal and informal culture, values, and practices of the University and of the department. Send out an announcement to relevant team members (internal and external to your department) in advance.	New Employee Email Announcement Template

NEW EMPLOYEE EMAIL ANNOUNCEMENT TEMPLATE[iv]

The following template is designed to help managers introduce a new direct report to the team. Please note that this is only a suggested format. As you make changes to personalize the email, please keep three things in mind:

1. *Be Upbeat*: Focus on how excited you are to welcome this new team member.
2. *Be Brief*: It's important to provide background information on your new team member and that person's responsibilities, but be careful to not go too in-depth and potentially set false expectations for the team regarding the new employee's role.
3. *Be Helpful*: Encourage the new employee's colleagues to reach out to help the new employee acclimate to his/her new role.

Dear [team],

It is with great excitement that I announce [new employee]'s future role with our team. [new employee] will be responsible for [provide description of the role].

[new employee] comes to Ryerson from [former company name] where they [provide a two to three sentence description of the new employees relevant work history].

[new employee]'s first day is [date]. We are excited and very fortunate to have [him/her] join our team. Please join me in welcoming [new employee]. I encourage you to connect with [new employee] to welcome [him/her] to the team and to share your formal and informal knowledge regarding our organization, department and clients. [Encourage colleagues to play a role in integrating the new employee to the organization].

ONBOARDING COLLEAGUES

An "onboarding colleague" is someone who partners with the new employee during the first year of employment to offer advice and guidance to foster their skill and professional development.

The onboarding colleague knows the ropes, but more importantly knows what actions to take to be successful in achieving the department/faculty goals and objectives. The onboarding colleague is an effective source of advice and encouragement who steers the new employee in the right direction and helps create and maintain a positive, productive first year of employment.

With an effective onboarding colleague, each new employee will quickly become a contributing member to his or her new department, understanding how they fit in, what is expected of them, and how they will succeed.

Management Responsibilities	Onboarding Colleague Responsibilities
- Select a positive role model as an onboarding colleague. - Ensure the onboarding colleague has time to be accessible to the new employee. - Provide the onboarding colleague with the tools needed to be an effective onboarding colleague (e.g., skills in coaching, feedback, communication). - Monitor the onboarding colleague/new employee relationship and evaluate the program.	- Be an informational resource for the new employee on policies, procedures, work rules, norms, etc. - Provide insight, feedback, and information that support the new employees social involvement in the department. - Be a tour guide; provide introductions. - Identify resources to help the new employee.

ONBOARDING COLLEAGUE SELECTION CRITERIA

- Demonstrates high performance; is a positive role model
- Is skilled in the new employees job; is a peer
- Is proud of the organization
- Has patience and good communication and interpersonal skills
- Willingly takes on responsibilities associated with the onboarding colleague role

TIPS FOR ONBOARDING COLLEAGUES

1. Don't worry about being perceived as the "expert." Your experience is important to the new employee. You don't have to have all the answers.

2. Be patient and positive. It takes time to develop a relationship. Don't try to cover everything right away. Onboarding colleagues need to allow enough time for growth.

3. Don't try to force a relationship.

4. Look for a preferred style of communication and/or cultural identification.

5. Don't try to turn the new employee into your clone. That person may have a different style from yours. Let the new employee develop.

6. Listening may be more important than giving advice.

7. Don't be judgmental; ask questions such as: "What do you need?" "What makes you feel that way?" "How can I help?" etc. Don't draw conclusions without exploring why someone feels or acts the way they do.

8. Keep a good attitude and stay in a teaching spirit.

ONBOARDING COLLEAGUE CHECKLIST

☑ Plan to be available on the first day to meet and possibly greet the new employee.

☑ Introduce the new employee to others in a casual way, "Oh Kim, have you met our new employee (name)? Kim works in the Faculty of Arts." It's an informal way to reinforce names.

☑ Take the new employee to get their OneCard validated at the Library if they haven't done so already.

☑ Meet with the new employee at the end of the day to see how things went.

☑ Answer questions the new employee may have.

☑ Provide a tour of essential areas, including departments relevant to new employee's job, such as Human Resources, Student Centre, bank machines, food services locations, cash office and ATM, Health Centre, Athletic Centre, day care, etc.

☑ Arrange to meet them for lunch in the building lunch area for the first few days.

☑ Ask if there is anything needed, and connect them to the best people to meet those needs.

☑ Offer encouragement and continue to connect regularly throughout their first year.

HIRING LEADER'S ONBOARDING CHECKLIST[v]

This checklist is designed to assist the hiring leader with the onboarding process. It is organized chronologically and assists in the preparation. You may wish to add additional activities and/or delegate the task to another member of the team (for example, arranging the lunch).

	Pre-Arrival
☐	Once the employee signs the letter of offer/contract, call/email to officially welcome the new employee to Ryerson to answer any immediate questions. Clarify what time you expect him/her to arrive on their first day and the location of the faculty/department, parking etc. Provide a contact number in the event of a question or issue. Ask the employee if any workplace accommodations are needed to be able to do their job. Contact your HRMC for advice and assistance.
☐	Prepare a schedule for the first 1-2 weeks (see the Schedule Template) and assemble a department orientation packet to include contact names of department and where to find frequently used information/forms.
☐	Arrange a lunch for the new employee on their first day.
☐	Assign an onboarding colleague. See Onboarding Colleagues overview.
☐	Set up/order computer, user accounts (matrix ID, security access and email) and phone by contacting CCS at http://www.ryerson.ca/ccs/.
☐	Send an announcement via email to relevant parties announcing the new employee and start date. See the Announcement Template for guidance.
☐	Collect information to give the new employee upon arrival (items such as job description, organizational charts, strategic plans and priorities, phone listing and specific policies and procedures that pertain to their role).
☐	Ensure workspace is clean and has all necessary equipment and supplies. Arrange for a name plate and/or business cards and keys so they are ready prior to the employee's arrival. Verify any accreditations with employee prior to printing business cards.
☐	Plan the employee's first assignment/project so he/she has early success.

New Employee Orientation (First Day)

☐	Make sure you or a designate is present to greet the new employee.
☐	Introduce the new employee to co-workers and have them set up one-on-one conversations with team members throughout the first few weeks.
☐	Provide time for new employee to meet with HR to review and complete all necessary new hire documentation.
☐	Introduce/identify the onboarding colleague.
☐	Discuss procedures for scheduling time off, unexpected absences and what to do if they will be late. Explain working hours/schedule, breaks, overtime, eHR (http://www.ryerson.ca/ehr/), pay schedule (http://www.ryerson.ca/hr/payroll/index.html), flexible work options, if applicable.
☐	Clarify vacation, sick time, CTO, statutory holidays (http://www.ryerson.ca/about/vpadministration/stat_holiday/), policies (http://www.ryerson.ca/hr/policy/policies.html) and Collective Agreement provisions (http://www.ryerson.ca/hr/policy/).
☐	Give a department tour including location of washrooms, kitchen and use of appliances, copy/fax machine and emergency exit.
☐	Provide computer and phone orientation (computer sign-in, shared drives, email and voice mail) and provide telephone instructions found at http://www.ryerson.ca/ccs/phones/telephones/userguides/.
☐	Review information about what to do in case of an emergency. The University emergency response information is available at http://www.ryerson.ca/ehss/emergencies. In addition, ensure you identify any procedures unique to the employee's work location(s).
☐	For each employee that requires accommodation in the event of an emergency, work together to review the instructions on Implementing Individualized Emergency Plans and complete the Individual Emergency Plan form.
☐	Remind employee to obtain their ID card by accessing the OneCard office website at http://www.ryerson.ca/onecard/faculty/ and follow the instructions.
☐	Complete the Departmental Photocopy Information Form (http://www.ryerson.ca/onecard/pdfs/photocopy_request_form.pdf) and give it to the new employee to take to the OneCard office to allow use of the photocopier.
☐	Distribute assigned key to office (if appropriate). Give the new employee information and instructions about obtaining and using equipment and supplies (fax, photocopier etc).
☐	Review onboarding objectives, timelines and provide an overview of the position responsibilities.
☐	Arrange for weekly meetings with the new employee to review and support their transitions. Hold some meetings in an informal atmosphere to make the new employee feel more comfortable.

	New Employee Orientation (First Week)
☐	Review in detail responsibilities, competencies, expectations and explain how the role fits in the work group and department. Where recommended, provide a Performance Plan (http://www.ryerson.ca/hr/management/drive_performance/index.html).
☐	Explain your own responsibilities and current priorities and how the employee's job supports them.
☐	Provide the new employee with a clear explanation of their first assignment.
☐	Review the department's mission, vision, current goals and priorities, and provide a copy of the current organization chart. Review the functions of other departments where relevant.
☐	Ensure that the employee has reviewed Ryerson's Academic Plan (http://www.ryerson.ca/senate/academicplan.pdf) and the Administration and Finance Mission, Vision and Values (http://www.ryerson.ca/content/dam/about/vpadministration/assets/pdf/Vision-2011.pdf)
☐	Review the department and RU's website (www.ryerson.ca) with the employee to answer any questions he or she has about using it.
☐	Ensure that the new employee and onboarding colleague are meeting regularly.
☐	Explain confidentiality in the workplace, what can be shared and what can't, and how confidential documents are stored. Remind the new employees to read Ryerson's Information Protection and Access policy (http://www.ryerson.ca/about/vpadministration/assets/pdf/InformationProtectionandAccessPolicy.pdf) and sign the Confidentiality Agreement.
☐	Review Departmental Guidelines document and other relevant University policies impacting their work.
☐	Discuss how you and the employee will communicate; preferences of each, patterns and frequency, and how the employee can give feedback to improve things. Review relevant decision making processes.
☐	Share unwritten rules, nuances, and traditions with the employee.
☐	Remind the employee to activate their account to get access to eHR (self-serve) at https://rms-web.ryerson.ca/activation/index.html.
☐	Ensure employee completes mandatory AODA eLearning and advise them to print off and provide their certificate of completion to you.
☐	Schedule meetings with key employees outside the department, as required.
☐	Review the onboarding process with the employee. See the Check-in Interview.

	Department Onboarding (First 3 months)

☐	Schedule regular meetings to touch base, review and clarify performance objectives, expectations, project updates and answer any questions.
☐	Provide positive coaching to build esteem and confidence.
☐	Complete a Performance Planner (http://www.ryerson.ca/hr/management/drive_performance/index.html) to ensure knowledge transfer and success (contact HRMC for further information).
☐	Review issues or challenges and identify how to resolve.
☐	Continue to provide regular informal feedback.
☐	Support and ensure attendance at the New employee Orientation (invitation sent by OEE).
☐	Conduct Interim Review, if applicable (contact your HRMC).
☐	Conduct Probationary Review, if applicable (contact your HRMC).
☐	Discuss training completed and training planned for the future.
☐	Remind and ensure that Information Security Training (e-learning) is completed.
☐	Remind and ensure that eHR training has been completed to update records, time reporting and/or request absences on line.
☐	Remind and ensure that all Health and Safety orientation and training is completed.
☐	Discuss other workshops and training available to the new employee that may be beneficial to their development. Review the learning and development opportunities at: https://www.runner.hr.ryerson.ca/training/
☐	Provide information about University events and activities related to the employee's interests.
☐	If the new employee's position includes financial management please contact: Financial Services (ext. 6556) for information on various types of financial training sessions available.

Ongoing Onboarding (3 months plus)
☐ Continue meeting to touch base, review and clarify performance objectives, expectations, project updates and answer any questions.
☐ Continue to provide positive coaching to build esteem and confidence.
☐ Continue to review issues or challenges and identify how to resolve.
☐ Continue to provide regular informal feedback.
☐ Review the onboarding process with the employee—is it working well?
☐ Conduct Interim Review, if applicable (contact your HRMC).
☐ Conduct Probationary Review, if applicable (contact your HRMC).
☐ Discuss career development and plans for the future.
☐ Discuss and offer professional development opportunities.

SCHEDULE TEMPLATE

Day One			
Time	**Topic/Objective**	**Responsibility of**	**Tools/Resources**

Day Two			
Time	**Topic/Objective**	**Responsibility of**	**Tools/Resources**

NEW EMPLOYEE CHECK-IN INTERVIEW

Purpose: This tool provides hiring leaders with questions to initiate a productive and meaningful discussion with new employees. These discussions will assist in the development of a positive working relationship and it is recommended that this take place within the first week.

Time Required: 20 minutes

1. Who have you met this week (colleagues, department contacts etc)?

2. If you had questions, who was available to answer your questions?

3. What has our team done to make you feel comfortable?

4. What was the best part of your first week? What did you find most interesting?

5. What was the most challenging part of your week? How could we have made that challenge easier to manage?

6. Is there anything that you think we should change to help new employees during their first week?

7. Is there anything that we haven't explained fully?

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