Inclusive Onboarding Checklist

Introduction

Onboarding is a crucial step in nurturing an inclusive workplace. It's also a critical ingredient in employee engagement. Like other steps you take to increase inclusion, having an intentional will make sure that your values, and desired outcomes, are centered as you welcome new employees. This checklist gives you some of the essential steps. You will also want to customize to reflect specific aspects of your organization.

Set an expectation that onboarding is a 6- to 12-month process. Communicate this to your team.

Recruitment

Let people know about your robust onboarding program during the recruitment process. Make sure to explicitly describe your onboarding program as a reflection of your commitment to equity, diversity and inclusion. Emphasize that all new employees receive a customized welcome, and that support for learning about the job and the organization are part of all employee's first year.

Before Your Employee Starts

Set Up Equipment, Office and Work Environment

_____Welcome packet (physical or virtual)

    _____ If a physical packet, was accessibility considered in font size and color?

    Welcome packet should include:

        _____ job description

        _____ welcome letter

        _____ contact names and phone lists

        _____ building map

        _____ parking and transportation information

        _____ mission and values of the organization

        _____ information on your department or functional group

        _____ organization's Equity, Diversity and Inclusion Statement

        _____ Code of Conduct

        _____ EEOC policy and resources

        _____ affinity or employee resources groups guide

        _____ other

_____ Stock workspace with supplies

_____ Order office or work area keys

_____ Order business cards and name plate

_____ Add employee to relevant email lists

_____ Order technology equipment

    _____ ask new employee about any special equipment needs or requests

    _____ computer

    _____ printer

    _____ tablet

    _____ phone

    _____ software

    _____ contact local IT team to set up the system in advance

_____ Set up email

_____ Arrange for access to common drives and other internal systems

_____ Arrange for phone installation, if applicable

_____ Arrange for parking, if needed

_____ Review common spaces for visible indicators of the organization's values and expectations

    _____ Are the organization's values posted in the break room?

    _____ Do posters and images displayed in common areas reflect an array of cultures?

    _____ Is there an All Gender bathroom option?

        _____ If yes, is it clearly labeled?

    _____ Is there a designated nursing space available?

        _____ If yes, is it clearly labeled?

    _____ Is there a designated space for prayer or meditation?

        _____ If yes, it is clearly labeled?

    _____ Is an accessible bathroom near the new employee's workspace?

        _____ If yes, is it clearly labeled?

Prepare Your Team

_____ Send an email announcement to your employee's department/team. Include start date, employee's role, and bio. Copy the new employee, if appropriate.

_____ Invite your team to share ideas about what can be done to welcome the new employee. Ask people to make a commitment to actively welcome the new person, help with questions and connect them with resources, as needed.

_____ Ask them to remember what it was like when they were new. Without assuming that everyone's process is the same, ask them to show care and be helpful.

Make Connections

_____ Select your new hire's onboarding partner. Meet with them and provide suggestions and tips. An onboarding partner understands your organization's practices, culture, processes and

systems. This person is emotionally intelligent and culturally competent, has high personal performance standards, and has time to meet with the devote to working with the new employee.

_____ Set up meetings with critical people for the employee's first few weeks.

_____ Arrange for lunch with team members and their onboarding partner for the first day and during the first week.

Reach Out

_____ Call your new employee to let them know that you look forward to working together. Share some information that will be useful for the first day and follow up with an email that includes what was shared verbally. Communicating in verbally and in writing takes into consideration different learning styles.

_____ While on the phone, ask if the new employee has questions. Sometimes people will not think of questions during the call or may be intimidated to ask questions that appear naïve. So, have 1-2 questions with answers prepared to share proactively. You can say, "A couple questions that people often have are…"

_____ On the call, and then in the email you send as follow up, make sure to confirm start date and time, location to report ("I will meet you at 9:00 am tomorrow in the Human Resources Office on Floor 7 of the Main Building").

_____ Include information about parking, dress code, whether a café is available or if most people bring lunch and use the refrigerator in the staff lounge, and other details that might be helpful.

_____ Remind the new employee to bring any relevant identification required to complete paperwork (Passport, Driver's License, etc.)

First Day

The First day, week and month are key. They are opportunities to clearly convey your values. Be proactive. Think in advance about how you will start the new relationship with intention.

_____ Be there to personally greet your new employee.

    _____ Perhaps give them a small gift, like a plant, a coffee mug or water bottle with the organization's logo.

    _____ Most importantly, smile and show interest. A smile and personal warmth are universally understood and appreciated.

_____ Show the new employee their working space.

    _____ If it is in a shared space, introduce colleagues who are also in that working area.

    _____Invite colleagues to share their name and job.

    _____ Reinforce that "We have all been looking forward to your start. We are here to be helpful. Come to any of us with questions. We are all eager to be helpful."

_____ Give a tour of the new employee's primary working area.

    _____ This includes the break room or staff lounge and any norms that are associated with it's use.

    _____Show them the employee bathrooms. Use inclusive language and avoid "ladies' room, men's room," etc. Do not make assumptions. Show the marked bathrooms including whether or not there is an All Gender bathroom. If there is not, mention that point explicitly and let the person know that if they would like an All Gender bathroom option to talk to you or someone in Human Resources.

_____ Describe how the new employee should spend their first day and describe the first week's schedule.

_____ Describe the functional area's purpose within the larger organization.

_____ Review the job description, outline of duties, and expectations.

    _____ Describe how employee's job fits in the department and how it contributes to the larger organization.

First Week

_____ Have new employee attend a formal orientation session.

    _____ Explain policies and procedures, including work hours, flexible work policies, overtime, use of vacation and sick time, holidays, etc.

    _____ Arrange for pertinent trainings required for the job.

_____ Introduce your new employee to their onboarding partner.

_____ Provide access to the employee portal or wiki space, add them to relevant listservs, and communicate expectations for accessing information shared in those spaces.

_____ Work with the new employee to create the employee's calendar for the first two weeks and add regularly scheduled team or staff meetings. *(Tool: Give employee the Daily Planner and Weekly Strategy templates to help them structure their days and weeks.)*

_____ Plan the employee's first project or assignment.

First Month

In the first month your employee should transition from getting acclimated to contributing. Your role is to help them feel settled into their position as they continue to develop and learn about their role and the organization.

_____ Make sure to have 1:1 meetings at least weekly. Meeting more often, even for short periods of time, is important especially as the new employee is getting acclimated. *(Tool: Use the 1:1 Meeting Template to help you and your new employee prepare.)*

_____ Elicit feedback during 1:1 meetings and make adjustments, as needed.

_____ Discuss performance and professional development goals. Let them know about professional development opportunities, applicable conferences or professional interest groups, and procedures to request attendance and funding.

_____ Continue introducing employee to key people and bring him/her to relevant events.

_____ During the first group meeting with the new employee:

    _____ Make sure that group Norms are posted and discussed. Invite the new employee and other team members to add or revise any of the norms.

    _____ Do a brief teambuilding exercise that allows the new employee to get a sense of the group dynamics and begin building rapport with the team.

_____ Meet with employee and their Onboarding Partner to review the first weeks, answer questions and offer support.

_____ Have employee "shadow" you (or someone else) at meetings to get exposure to others and learn more about the department and organization. Schedule time for debrief of meetings allowing you to help the employee make connections between actions, decisions, practices and the organization's culture.

_____ Ensure employee has attended any Human Resources-sponsored orientation sessions.

Months 2-6

Through the first 6 months the employee will still be getting accustomed to the rhythm of the organization. They will be developing competence with their core job functions and establishing rapport with colleagues. In addition, they will be students of your leadership style, communication preferences, performance expectations.

_____ Continue regular 1:1 meetings. Avoid the temptation to move solely or over-depend on an "open-door policy" instead of structured and scheduled meetings. While an open-door policy is not strictly problematic, it places expectation on the employee to initiate information-sharing and discussion and self-advocate in ways that could place undo burden on the person with less positional power.

_____ Wind down the onboarding partner relationship. The formal relationship between employee and Onboarding Partner should ideally last 3-6 months. Negotiate an end date and anything that needs to be done to transition. As the end date is being discussed, make sure that you and both parties understand needs, expectations, and celebrate the relationship.

_____ Schedule a 3-month check-in meeting. Identify and celebrate accomplishments to-date. Establish milestones for the next 3- and 6-month intervals. *(Tool: Customize the Appreciate Coaching Template to structure a discussion.)*

_____ Delegate tasks and projects with structured support. Though the employee was hired with a solid skill set, they will need time to learn tools and approach that are unique to your organization. In the early months, delegate tasks and projects with clear agreement about how communication will be management, and expectations about timeline and quality. For example, "Let's agree that you will send me, via email, the first draft of the document by Monday at noon.

We can then discuss it during our scheduled 2 pm meeting. Our final deadline is next Friday but a mid-point meeting will allow us to make sure are communicating and time iterate, as needed."

_____ After 3 months, talk with the team about how group dynamics have adjusted to include and take full advantage of the newest employee's contributions.

Months 7-12

_____ The employee is now past the steepest part of the learning curve. Celebrate it! Discuss performance and accomplishments from the first 6 months.

_____ Invite the employee to think about specific learning objectives they have for the rest of the year. The manager is also prepared with some suggestions, including opportunities for professional development, taking on a project, joining on committee, etc.

_____ Have a half-year check-in meeting. Invite observations and questions about the organization's culture or practices. For example, "You've been in your role now for more than 6 months. Now that you've have some experience with this organization, what are your observations and reflections of our practices and culture? What has been working well for you, and why? What, if anything, has been challenging, and why? What questions do you have about the "under the waterline" (see Essentials of Cultural Competence course) elements of our culture that I might be able to help describe?

_____ Reflect on your role onboarding this employee and document your learning. What worked well? How do you know? How will you share what worked well within your organization? What could have been done differently? What resources do you need to have a more effective onboarding practice in the future? What do you need to do to secure needed resources?

Onboarding is an art and a science. Simply having a checklist doesn't ensure that it will be perfectly executed or that the new hire will thrive in your organization. You have to care, put forward the energy that demonstrates your level of care, and be consistent over time.

Here's the key – be intentional, take a structured approach, build in small feedback loops, make adjustments as needed. You've got this!