

Inclusive Onboarding Checklist

You will also want to customize this checklist to reflect specific aspects of your organization. What else is essential for the first year? 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

Set Up Equipment, Office and Work Environment. Help Prepare your team, start creating connections, and reach out to the new employee to check in prior to start date.

First Day-Week

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.



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.

Month 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.



Month 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.

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, acting with intention 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 this checklist to reflect specific aspects of your organization. What else is essential for the first year?

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



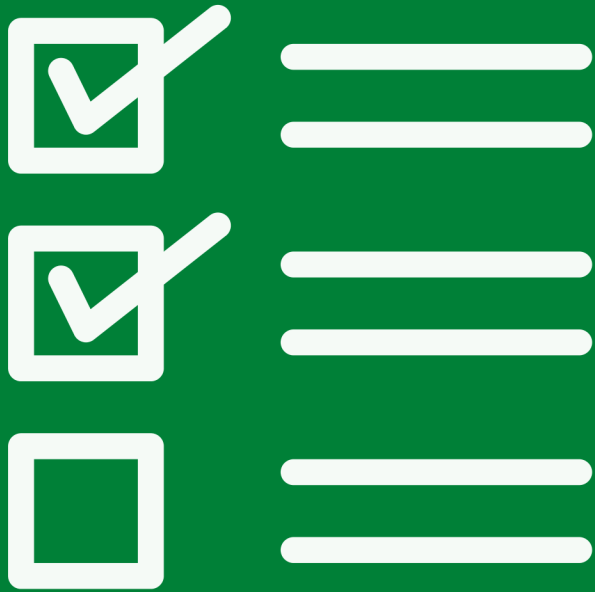
Before Your Employee Starts



- Welcome packet (physical or virtual)
 - ___ Was accessibility considered in font size, color, and format?
- 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

Before Your Employee Starts



- 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



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- 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 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 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 the start date and time, as well as the location to report to (“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

- 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."

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- 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 its 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.
- 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.
- Introduce your new employee to their onboarding partner.
- 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.
- Provide access to the employee portal or wiki space, add them to relevant list servers, and communicate expectations for accessing information shared in those spaces.
- Plan the employee's first project or assignment.
- Work with the new employee to create the employee's calendar for the first two weeks and add regularly scheduled team or staff meetings.

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.
- 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 them 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 team building exercise that allows the new employee to get a sense of the group dynamics



First Month

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



Month 2-6

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.

- Continue regular 1:1 meetings. Avoid the temptation to move solely to 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 undue 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.



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.

- 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 approaches that are unique to your organization. In the early months, delegate tasks and projects with clear agreement about how communication will be managed, 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 midpoint meeting will allow us to make sure we are communicating and that we have time to 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.



Month 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 had 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" 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?