**Onboarding Toolit**

**Human Resources**

**Fall 2022**

**Purpose:**

The purpose of this document is to provide:

* a consistent approach for onboarding or transitioning in a new employee across the organization
* managers with tools and resources to use to onboard or transition in a new employee

**Background:**

* Human Resources observed that the organization as it has evolved would benefit from tools, or resources to assist managers to onboard new employees
* Faculties and Departments may or may not have existing processes to onboard new employees or may have processes that are not consistent from one to another
* In 2021, Cornerstone was chosen as a platform to provide Applicant Tracking, Performance Management, and Onboarding. Applicant Tracking and Performance Management have been implemented. The Onboarding module will launch in fall 2022
* This toolkit was developed to accompany the system module

**Objectives:**

The following are desired outcomes of the onboarding program:

* Provide a consistent onboarding experience
* Support newcomers and make them feel welcome which should drive retention
* Provide newcomers with tools/resources even before they arrive for their first day
* Provide managers with resources and tools to ensure their new hire’s time to full productivity is realized efficiently and effectively.
* Help the new employee learn about the organization prior to arrival
* Help the new employee understand performance expectations for a new role/job
* Help the employee reach performance expectations
* Help the new employee understand, navigate, and comply with organizational culture, expectations, organization structure, interpersonal relationships, and networking
* Make the new employee feel valued by the organization and excited to work for the institution
* Help the manager/team learn more about the new employee

**Strategic Consideration:**

The University’s Strategic Plan and Strategic Priorities and the OD and Recruitment Strategic Plans drive the following considerations for the implementation of an Onboarding Program:

* Create a consistent, desirable, supportive work environment or culture
* Support the recruitment process by providing a positive experience which makes Ontario Tech an employer of choice and drives employee retention
* Provides a bridge that explains performance expectations for a new role and assists employees to meet those expectations and then folds those expectations into annual performance cycles

**Tools and Resources:**

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|  | **Name** | **Description** | **Attachments** |
| 1 | **Onboarding Guide** | Information about what onboarding is and isn’t, best practices, do’s and don’ts |  |
| 2 | **Onboarding Checklist** | Checklist of items to cover pre-first day, first day, first week, first month, first hundred days |  |
| 3 | **Onboarding – Transition Plan Template** | Follows the Read, See, Say, Do model and ensures that all work gets transitioned to a new hire or new person in role successfully. Requires job specific inputs from a manager or designate. |  |
| 4 | **Email One** | Sample email with **suggested wording** after acceptance of position. |  |
| 5 | **Email Two** | Sample email with **suggested wording** **and a suggested day 1 itinerary** prior to first day to set expectations. |  |
| 6 | **Concur Profile Request Form** | To enable expense reporting | <https://sites.ontariotechu.ca/finance/treasury-and-financial-operations/financial-forms.php> |
| 7 | **Access Card Request Form** | Key request form  Access request form | <https://sites.ontariotechu.ca/ocis/forms-and-procedures/index.php> |

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