### more than a checklist

The steps you take to welcome a new employee directly impact how that employee feels about their experience of working at UVic. This is called employee engagement, which determines how fast an employee learns, how productive they are, their approach to client service and how long they choose to stay working here. This checklist serves as a high-level guideline of onboarding tasks and their strategic connections for supervisors to consider when integrating new team members into any UVic unit. It is by no means an exhaustive list of everything that will comprise the employee onboarding experience. A “Build Your Unit Onboarding Checklist” template is available as a companion for those who wish to expand these tasks into their more detailed administrative and logistical components. Feel free to adapt, expand, and customize these tools to your unit’s unique context as required.

### CONNECTING the CATEGORIES

Each element of an employee’s onboarding experience is an opportunity for them to feel a part of something bigger. We have organized these connections into 5 categories including UVic’s requirements (such as policies and procedures) and the four themes of UVic’s Competency Model. These categories outline opportunities for engagement, community, and strategic connections that can be generated by completing the tasks in the checklist on Page 2.

When you onboard effectively, the following employee experience is possible…

|  |  |
| --- | --- |
| **REQUIREMENTS** | **My ACCOUNTABILITIES: I know what I am responsible for, and am equipped to respond, *because my supervisor has…***   * Informed me of relevant Policies and Procedures * Informed me of my job requirements and associated training * Informed me of legal responsibilities, standards and best practices as they pertain to my role * Informed me of relevant Collective Bargaining Agreement(s) |
| **PEOPLE & PLACE** | **My SELF: I am prepared to be an active and engaged member of the community, *because of the efforts of my supervisor I feel:***   * Recognized and valued as a unique individual * A sense of belonging and contribution * Aware of the impact and alignment of my individual values with approaches to social and cultural issues on campus |
| **WORK TOGETHER / ĆȺNEUEL OL** | **My TEAM: I am able to build relationships and feel connected to people on my team, *because my supervisor has…***   * Introduced me to my team members and our team culture * Welcomed and included me in unit communications * Helped me to understand my role in relation to others on the team * Positioned us for team effectiveness and relationship success |
| **MAKE IT BETTER** | **My JOB: I know what is expected of me and I am supported to strive for excellence, *because my supervisor has…***   * Provided me with the resources to perform the full scope of my job according to best practices * Informed me of the quality, performance, service and efficiency assessment criteria for my role * Supported me in creating goals for my job and career development |
| **MAKE A DIFFERENCE** | **My ORGANIZATION: I see myself as part of the larger organization, *and because of the efforts of my supervisor I can…***   * Understand the organization’s structure, mission, vision, values, and strategic goals * Recognize my role as an ambassador for the organization’s brand and reputation * See how the day to day function of my job connects to the strategic direction of the university * Support the mission of our research-intensive and student-focused community |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **EMPLOYEE NAME:** | |  | **Requirements** | **People & Place** | | | **Work Together** | **Make It Better** | **Make A Difference** | |
| **ROLE:** | |  |
| **FIRST DAY OF WORK:** | |  |
| **Before the Employee Arrives** | | | | | | | | | | |
|  | **Pre-Arrival Paperwork**   * Initiate and follow-up with “onboard” in UVic Careers * Complete and submit *Recommend for Appointment* form * Prepare probationary/trial review form | | ***✓*** | ***✓*** | | |  | ***✓*** |  | |
|  | **Workspace Preparation**   * Designate workspace and furniture * Order applicable supplies * Arrange for workstation equipment | |  |  | | | ***✓*** | ***✓*** |  | |
|  | **Team Communication**   * Circulate staffing announcement * Add contact information to relevant directories | |  |  | | | ***✓*** | ***✓*** |  | |
|  | **Get Organized**   * Send employee any pre-first-day information they may require * Prepare Week 1 schedule * Compile any Week 1 materials or communications | |  | ***✓*** | | |  | ***✓*** |  | |
| The first few weeks | | | | | | | | | | | |
|  | **Workplace orientation**   * Provide a tour of the workspace * Share information about unit facilities including: washrooms, break rooms, kitchens, personal storage, and safety * Share locations and instructions regarding department equipment | | ***✓*** | |  |  | | ***✓*** | |  | |
|  | **Office/Team Culture**   * Introduce to co-workers * Share department mission, vision, purpose, and goals | |  | | ***✓*** | ***✓*** | |  | | ***✓*** | |
|  | **Paperwork**   * Have employee submit Benefit Enrolment forms * Provide employee with a copy/link to the New Employee Handbook and have them review it * Have employee visit the ONECard office for their ID * Arrange for required signing authority and approvals | | ***✓*** | | ***✓*** |  | | ***✓*** | | ***✓*** | |
|  | **Procedural**   * Provide copies of and review all applicable policies & procedures * Ensure employee completes relevant safety orientation * Arrange for any department-specific training * Communicate unit processes for requesting and reporting absences (leaves, vacations, sick time, etc.) * Review job description, set performance expectations and communicate and document relevant probation process | | ***✓*** | | ***✓*** |  | | ***✓*** | | ***✓*** | |
|  | **Technical**   * Arrange for technical orientation to phone & computer systems * Provide email signature and voicemail standards * Arrange access to required systems and databases | | ***✓*** | |  |  | | ***✓*** | |  | |
|  | **UVic Community Orientation**   * Provide employee with an overview of the university structure * Encourage employee to register for an Employee Campus Tour * Encourage employee to register for New Employee Welcome * Ensure access to relevant university training * Have employee subscribe to relevant newsletters | |  | | ***✓*** | ***✓*** | | ***✓*** | | ***✓*** | |
| the first year & Beyond | | | | | | | | | | | |
|  | **Performance Conversations**   * Orient to the Performance and Development Cycle * Ensure access to information about professional learning and development | | ***✓*** | | ***✓*** | ***✓*** | | ***✓*** | | ***✓*** | |