

Onboarding & Retention

Inclusive Recruitment Training Series

SPH-HR

Agenda

- Opening Reflection
- Onboarding
- Mid-Point Reflection
- Retention
- Closing Considerations & Ending Reflection
- Q&A

Onboarding

Stages

- Before First Day
- First Day
- First Week
- First 90-180 Days
- First Year

Before First Day



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- Complete the I-9 with the new employee and process the hire actions in Wasabi
- Acquire relevant equipment and materials (laptop, business cards, p-cards, etc.)
- Establish and grant IT access (HUID, email address, HarvardKey, s-drive, systems, etc.)
- Ensure that the new employee registers for orientations and has benefits enrollment details
- Enroll new employee in any required trainings (info security, laboratory, financial systems, etc.)
- Offer and arrange for reasonable accommodations



- Send a welcome email to the new employee and encourage team members to do the same
- Create an onboarding plan and agenda for first day & week, and share it with the new employee
 - Schedule meetings with relevant stakeholders in advance (manager, team members, partner groups, etc.)
- Create a training plan that incorporates competencies identified and evaluated in the recruitment process
- Assign an onboarding buddy
- Assign (and clean!) their office space
- Consider giving a small welcome gift (Harvard swag, a plant, a card from the team, etc.)

Remember – the onboarding plans that you create should include a self-assessment and personal training plan!

First Day

- Send an introductory email to the department and any other relevant stakeholders, with the new employee CC'd
- Meet with the new hire in the morning and discuss the agenda for the day
- Review the organizational chart and group structure
- Share important informational resources (website, workplace policies, etc.)
- Introduce them to their colleagues and team
- Build in time for the new employee to reflect on the content shared, and for breaks

When on Campus

- Give an office tour
- Give a campus tour (facilities, meeting spaces, lunch spots, etc.)
- Go to the HLC ID Office to obtain an ID Card
- Take them out for lunch and/or an informal gathering with the manager and/or team

First Week

- Share team culture, values, and relevant policies
- Share and solicit preferences on communication style and format, meeting times, etc.
- Individual sit-downs with colleagues
- Give an overview of relevant systems that they have access to and will use regularly
- Start to attend/complete mandatory trainings
- One-on-one meeting with manager throughout and at the end of the week to recap
- Create plan for and schedule check-in meetings throughout remainder of onboarding, and plan for O&R period



First 90-180 Days



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- Maintain regular check-in meetings
- Clearly outline duties and responsibilities
- Set specific expectations and goals
- Share feedback, using tangible examples
- Individual sit-downs with additional, relevant partner groups
- Attend/complete additional trainings, including team style diagnostics
- Meet with new hire at end of O&R period to discuss expectations and performance, complete the review form in PeopleSoft

First Year

- Ensure that expectations are understood and being met
- Share feedback, using tangible examples
- Solicit feedback, both on job-related duties and onboarding
- Discuss position/career goals
- Discuss longer-term learning and development plan



Reminders

- Integrate HR practices
- Create effective workflows
- Use checklists
- Be consistent
- Evaluate and don't assume
- Keep feedback loops and communication open
- View each step through an inclusivity lens

Retention

Maslow's Hierarchy of Needs



Culture



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Organizational
Culture

Sub-Culture

Emotional
Culture



Cultures that aren't inclusive can lack...

- Trust
- Support
- Respect
- Autonomy
- Recognition
- Transparency
- Communication
- Room for growth
- Work/life balance
- Safety to speak up
- Psychological safety
- Space to bring authentic self to work



Understanding, Evaluating & Improving Your Culture



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Define

Gain Perspective

Plan

Take Action

Measure Results



Gain Perspective



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Quantitative Data

- Demographic composition
- Turnover rates
- Internal mobility rates
- Training completion rates
- Performance management completion rates
- Team growth over time

Qualitative Data

- Ask questions, observe behaviors, and document findings
- Review your internal stories or legacies
- Assess scope and capacity of team
- Review feedback from exit interviews and climate surveys
- Openly discuss interpretations of culture and values
- Conduct a team and self-assessment of performance
- Conduct a gap analysis to inform where you are today versus where you want to be in the future

Take Action

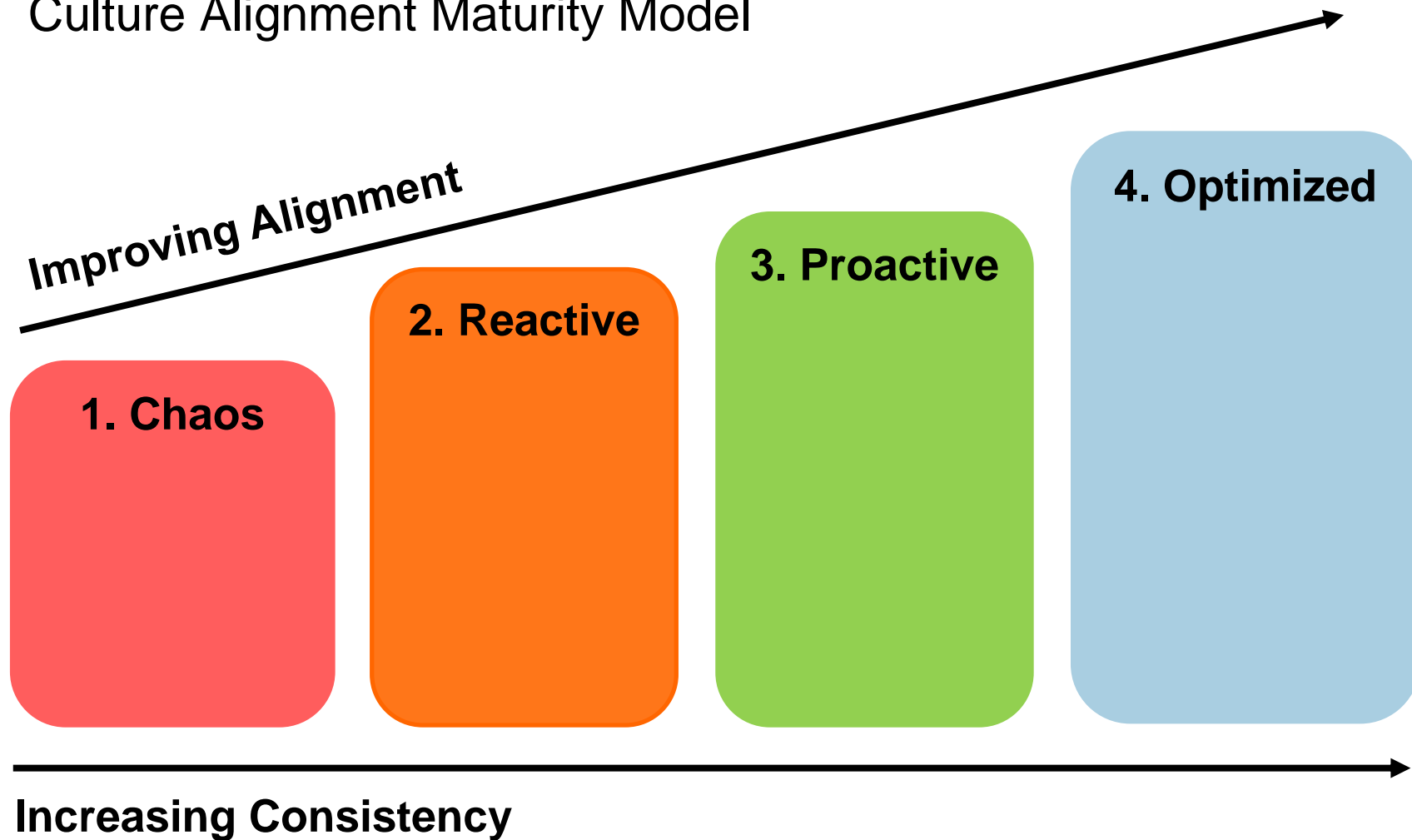
Intangibles

- Support and respect
- Room for growth
- Recognition
- Communication
- Psychological safety and safety to speak up
- Trust and autonomy
- Space to bring authentic self to work, and appreciation for unique characteristics
- Sense of belonging
- Work/life balance
- Transparency and loyalty
- Leadership support

Tangibles

- Stay interviews
- Pulse surveys
- Mentor/shadow programs
- Recognition events/appreciation days
- Communication styles diagnostics
- Professional development plans
- Succession planning
- Marketing materials
- Regular one-on-one and team meetings

Culture Alignment Maturity Model



Closing Considerations



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Reminders & Inclusivity Lens

- Begin planning for onboarding early, before a finalist is identified
- Create a consistent onboarding plan and process for your team
- Designate a primary point of contact for onboarding – and have a well-rounded onboarding team comprised of people who bring diverse experiences and outlooks, and who are both representative and respectful of different cultures and characteristics
- Recognize and address personal biases to and in the process, and seek additional training if needed
- Assess your internal sub-culture and take action steps, with collaborative team input, to change and/or nurture it
- Leave space for questions – from new employees, and for your own self-reflection
- Onboarding is retention!

Why is this Important?

- Candidate experience
- Employer brand
- Hiring effectiveness
- Financial Costs
- Non-Financial Burdens
- Retention
- Diversity
- Inclusion

Remember – meaningful change takes effort and time.

Last but not least... if you have questions throughout the process, please ask.

(...the sooner you get us involved, the better!)

Thank you!



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