NEW STAFF MEMBER ORIENTATION

A GUIDE FOR
HIRING MANAGERS AND SUPERVISORS

ARE YOU READY?

Centre for Organizational Development and Learning
Human Resources Service
Introduction

This guide is designed to assist you in orienting your new employees*. It contains guidelines for the steps you should follow before the employee arrives, on the first day, as well as during the first week, the first month and thereafter.

Effectively orienting new employees to the University of Ottawa and to their new roles is critical in establishing successful and productive working relationships. A new employee’s first interactions with you should create a positive impression of your faculty or service and of the University overall. The time you spend planning for the new employee’s first days and weeks on the job will greatly increase the chances for a successful start.

New employees have questions. Regardless of their position at the University, these employees want to know things like "What is this place like? What do they expect from me? Where can I go for help? Will I like it here? Will I do OK? How will I know if I'm doing OK?" As the hiring manager or supervisor, you play a critical role in the orientation process and it is your responsibility to answer these questions as quickly and effectively as possible. When these types of questions go unanswered, a new employee feels anxious and dissatisfied.

This guide is a reminder that all new staff members require a carefully planned and warm welcome to Canada’s University.

We recognize that each faculty and service is unique and have, therefore, designed this guide with flexibility in mind. However, there is one consistent element throughout any orientation process that cannot be compromised: Your commitment to spend the necessary time with a new employee during the first month of employment.

Complete the checklist on pages 9 and 10 to ensure you don’t forget any important elements!

* Note — In this guide, the gender-neutral term employee is used to represent the term “staff member”.

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Critical Elements of Successful Orientation

- Take the orientation seriously, regardless of the position a new employee holds.

- Be willing to invest time, effort and resources to develop and maintain an effective orientation process.

- Make sure the employee’s first day is well managed. Welcoming them is your top priority. Under no circumstances should an employee have to wait around for you or be welcomed by anyone other than yourself (or your delegate, in some exceptional circumstances). Employees will remember their first day!!!

- Tell the employee as much as possible about the University of Ottawa as well as his or her own faculty or service. Regardless of the employee’s position at the University, a new employee is interested in the entire institution.

- Teach the basics first—people need to know the "how," “where” and “why” of getting things done before starting regular assignments.

- Ensure proper timing of information you give to a newcomer and avoid information overload. Provide only the "need-to-know" information at first.

- Be flexible in order to address the diverse needs of all employees.

- Help each new employee set objectives and develop action plans to help them achieve their goals.
ORIENTATION AT A GLANCE

The new staff orientation program at the University of Ottawa is designed to last approximately one month. This, of course, does not mean that you will be spending one month of your time with each new hire. New employees are oriented over a period of time in order to avoid information overload. You are not the only person involved in orientation. You can assign a co-worker or a "buddy" who will orient the employee on specifics of the job and who can serve as someone a new hire can turn to for guidance. As well, if the new employee's direct supervisor is someone other than you, that person should also be involved in the orientation process.

The uOttawa staff orientation program is a two-tiered program shared between hiring managers and the Human Resources Service:

**Tier I** involves providing new employees with all necessary information about the University through the online staff orientation e-guide, [www.hr.uottawa.ca/welcome](http://www.hr.uottawa.ca/welcome), as well as providing the University at a Glance workshop offered regularly by the Centre for OD and Learning (CODL). New employees can register online at [web9.uottawa.ca/services/hr/formation/registration](http://web9.uottawa.ca/services/hr/formation/registration).

**Tier 2** involves your responsibilities as the hiring manager. They are set out in this guide.

**So who does what?**

The Human Resources Service, through its Centre for OD and Learning (CODL), is responsible for the development and ongoing updating of the orientation e-guide, [www.hr.uottawa.ca/welcome](http://www.hr.uottawa.ca/welcome). The HR Service is also responsible for responding to staff queries received via the Website.

Sectors within HR responsible for staffing or assisting staff in filling out required personnel forms or who prepare employee cards are also responsible for informing employees about the orientation e-guide on the HR Website and encouraging them to consult it.

Hiring managers and supervisors are responsible for the orientation of their new employees from the time they are hired, as outlined in this guide. The orientation e-guide can be accessed through any computer at work or at home. If your new employee does not require a computer for their work, please ensure that you make a computer available to them for orientation purposes.

Creating positive first impressions is very important. Therefore, if a hiring manager is not available to oversee the new employee’s orientation, a delegate or buddy (such as a designated peer) should be assigned to ensure that all the necessary steps are carried out (see guidelines on page 7). A designated peer works closely with the new employee during the first week of employment primarily to coach the new arrival on the specifics of the job and to answer questions.
ARE YOU READY?

Responsibilities of hiring managers/supervisors

✓ Welcome the new employee and make necessary introductions.
✓ Explain work tasks, assignments, responsibilities, accountabilities, etc.
✓ When feasible, assign a designated peer or buddy to work closely with the new employee during the first week of employment to coach them on specifics of the job and to answer questions. (See guidelines on selecting peers, page 7)

Typical tasks

Before the employee arrives

The new employee orientation begins even before the employee comes to work for the first time. Planning ahead for their arrival will allow you and the new employee to be productive from day one.

Before an employee arrives, you should:
✓ Tell the employee when to arrive and where to go on the first day. Providing a campus map is helpful: [http://www.uottawa.ca/maps](http://www.uottawa.ca/maps).
✓ Advise HR of the start date and complete all necessary payroll forms.
✓ Record the employee’s start date and make sure you or your delegate is available to meet him or her.
✓ Plan the orientation schedule—consider your time, your staff’s time and the time of others involved. If feasible, select a peer to work with the new employee in the first week and explain to the peer what the responsibilities are.
✓ Tell employees in your department about the new employee’s arrival date.
✓ Prepare workspace, supplies, other equipment, etc.
  o Confirm available space
  o Order required furniture
  o Ensure computer is ordered and software installed
  o Set up computer passwords
  o Request phone installation
  o Order office key(s)
✓ Assemble a kit containing specific information about the faculty or service (org. chart, mission statement, strategic objectives, annual plan, Website, etc.) and any reference books or manuals needed for the job.
✓ Draft short-term work expectations and identify the employee’s immediate training needs.
✓ Put together a list of key people the employee should meet and talk to in order to get a broader understanding of the roles of these people.

A more comprehensive list of reminders can be found in the manager checklist (page 9 of this guide).
The first day on the job

A new employee may be anxious about starting a new job. Try to create a comfortable environment. Do not overwhelm the employee with too much information on the first day. Orientation is an ongoing process, so there will be plenty of time to give the employee all the necessary information. On the first day, you should:

- Arrange to meet the employee promptly when he or she arrives (or assign a delegate).
- Give a warm welcome and try to reduce any nervousness the new employee may be feeling.
- Discuss your plan for the first day.
- Show the new employee around the office and introduce him or her to other employees.
- Make arrangements for you and/or someone on your team to have lunch with the new employee.
- Review the job responsibilities and departmental organizational chart with the employee.
- Arrange other logistics:
  - Employee ID card
  - Office key(s)
  - Business cards (as required)
  - Cellular phone (as required)
- Present the main facilities in the building or surrounding buildings: cafeteria, health services, banking services, mail, photocopy services, sports complex, other services, etc.
- Review use of phone, fax machine, computer, etc., and arrange for any necessary training.
- When applicable, discuss the probation process and how and when the employee’s performance will be appraised during the probationary period.
- Explain the payroll process, pay periods, date of the first pay and the hours of work required, including meal and break periods.
- Arrange for the employee to visit HR, complete all necessary personnel forms and visit the online orientation site: www.hr.uottawa.ca/welcome. Allow sufficient time for the employee to review the site during work hours.
- Inform employee of the University at a Glance Orientation workshop for new employees, offered by HR (CODL). This workshop includes a physical tour of the campus. The employee can register online at web9.uottawa.ca/services/hr/formation/registration.
- Review mandatory training workshops with the employee and stress the importance of registering for these workshops as soon as possible. A complete list is provided at www.hr.uottawa.ca/training/orientation. The employee can complete registration online.
Over the next few days and weeks

Schedule meetings with the employee to discuss the following:

✓ Employee’s overall impressions. How does the employee perceive your faculty, service or department? Discuss ideas and answer questions about how things work in your area.

✓ Discuss the work projects assigned to the employee and answer questions about the job.

✓ Present an overview of administration and governance at uOttawa. Spend time explaining the University’s structure, how it is governed, why it is unique compared to other private or public organizations and how your faculty or service fits into the bigger picture.

✓ Discuss uOttawa’s mission, vision and values and how the strategic objectives help support the University’s mission.

✓ Discuss pertinent institutional and departmental policies and regulations.

✓ Discuss the performance appraisal process (where applicable). Review material and explain that you and the new employee will develop a set of performance objectives and a feedback plan. You will meet with the employee at a later date to discuss progress and provide one another with feedback. Explain the timing of performance management meetings.

✓ Arrange for the employee to tour the campus and the various facilities on campus (if it has not already been done through the University at a Glance orientation workshop).

In the first month and thereafter…

✓ Ensure the employee has met all work colleagues and partners (where applicable).

✓ Complete the first round of performance objective-setting activities and schedule on-going feedback meetings to review objectives and progress made.

✓ Continue to complete the orientation checklist (pages 9 and 10 of this guide).
Guidelines on how to select peers

When feasible, assign a peer or "buddy" to work closely with the employee during the first few weeks of employment. The primary role of the peer is to coach the new employee on specifics of the job and to answer questions about daily routines. When selecting a peer, consider these tips:

- Select and match the employees carefully. Ensure the right “fit.”
- Choose a top performer. This person will set an example for the new employee.
- Ask the employee to volunteer as an assigned peer rather than requiring him or her to do so.
- Make it as easy as possible for the assigned peer to participate. Shift their work responsibilities.
- Show your appreciation to the assigned peer. The person should not feel penalized for participating in this important activity.
- Prepare the peer. Tell the peer what is expected and describe the duties.
- Monitor the peer arrangement. Follow-up with the peer and the new employee.

ORIENTATION CHECKLIST FOR HIRING MANAGERS AND SUPERVISORS

So how did you do?

This orientation checklist will assist you in determining whether you have adequately covered all the important steps of the orientation process.

Copy the checklist and use it for each new employee you hire to ensure each person receives all the necessary information and integrates well into his or her new position at uOttawa.

To show your commitment to this process, you may choose to have your new hire review the checklist (or you may complete it jointly). This will help ensure the person has everything needed to perform successfully in this new role.

**NOTE:** The checklist should be signed by the new employee's immediate supervisor, dated and retained in the staff member's departmental personnel file for future reference.
ORIENTATION CHECKLIST FOR HIRING MANAGERS AND SUPERVISORS

Staff member: _________________________________________________________
Faculty or service: ______________________________________________________
Department or sector: ___________________________________________________
Position: ______________________________________________________________
Hiring manager: ________________________________________________________
Date of hire: _________________________  Today's date: _____________________

BEFORE THE START DATE

You can submit requests for workspace, a telephone, a computer and accounts for a new employee as soon as you have the employee number. Delays can arise. As a result, we suggest you submit your requests as soon as you can.

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<thead>
<tr>
<th>Task</th>
<th>Date or N/A</th>
<th>Initials</th>
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<tbody>
<tr>
<td>Determine computer needs</td>
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<td>Investigate space requirements and make arrangements for workspace.</td>
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<td>Once a workspace is identified, contact Computing and Communications (for telephone) and/or your departmental technician (for computer). Ensure that computer and telephone are installed and working.</td>
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<td>Arrange for software installation and set up all necessary accounts (Windows account with e-mail, SIS account if needed, etc.).</td>
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<td>Encourage employee to register for the mandatory workshops: University at a Glance, Competency-Based Performance Appraisal, WHIMIS and Service Excellence at: web9.uottawa.ca/services/hr/formation/registration.</td>
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<td>Obtain name tag and business cards (as per internal policy of faculty, department or service).</td>
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<td>Update phone lists, University directory, schedules, org. chart, departmental e-mail lists, etc.</td>
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<td>Introduce new employee by e-mail (name, title, start date). Copy the new employee.</td>
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<td>Ensure the (immediate) team is aware of the start date for the new employee and everyone has some time in the first week to meet the new hire.</td>
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<td>Ensure a personal call is made by the manager prior to the new employee’s first day to welcome the employee to the University, explain where the person should go on the first day and that you will be taking the employee out for lunch on the first day (if appropriate).</td>
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<td>Coordinate a meaningful first work assignment.</td>
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### The first day and first few weeks

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<th>YES</th>
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<td>1. Did the manager complete all the required information on the hiring form?</td>
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<td>2. Did the employee fill out all required personnel forms (benefits, pension, etc.)?</td>
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<td>3. Did the employee visit the online <strong>orientation e-guide</strong> and review all pertinent information?</td>
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<td>4. Did the manager or &quot;buddy&quot; give the employee a tour of your sector/department and introduce the employee to co-workers?</td>
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<td>5. Did the manager assign a peer to work with the employee during the first week?</td>
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<td>6. Did the employee receive clear information on:</td>
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<td>- salary, benefits, pension</td>
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<td>- pay periods</td>
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<td>- annual leave</td>
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<td>- working hours</td>
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<td>- building facilities (washroom, food services, etc.)</td>
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<td>- information technology systems</td>
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<td>- mandatory training workshops (including University at a Glance)</td>
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<td>7. Did the manager or &quot;buddy&quot; discuss pertinent institutional or departmental policies and other information?</td>
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<td>8. Did the manager or &quot;buddy&quot; arrange for the employee to tour the campus and the employee's faculty or service?</td>
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<td>9. Did the manager or &quot;buddy&quot; introduce the employee to other staff and clients (where applicable)?</td>
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<td>10. Did the manager carry out all the necessary logistical preparations and at the appropriate time?</td>
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<td>- computer hardware, software and passwords</td>
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<td>- key(s)</td>
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<td>- other (where applicable)</td>
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<td>11. Did the manager discuss assigned projects and training plans?</td>
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<td>12. Did the manager discuss the performance appraisal process?</td>
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<td>13. Did the manager or &quot;buddy&quot; regularly encourage questions and answer any the employee had?</td>
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<td>14. Did the manager or &quot;buddy&quot; tell the employee that they will follow up periodically to answer any further questions?</td>
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