INCREASING EQUITY AT THE WORKPLACE

ORIENTATION AND ONBOARDING SYSTEM TOOLKIT

EQUITY

STEP 4:
GENERATE IDEAS FOR INNOVATION

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WORK EQUITY

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Orientation and Onboarding System

4.0 Introduction

We have organized Step 4 of the Toolkit for the Orientation and Onboarding System into two sections.

> **Section 1:** The tasks in this section will help your organization generate ideas for innovations that can strengthen the equity of your overall Orientation and Onboarding System, using the seven Levers for Change.

> **Section 2:** Recognizing that innovations in orientation and onboarding practices – one of the Levers for Change – can be catalysts for deep change in the equity of the Orientation and Onboarding System, your organization will focus particular attention on orientation and onboarding in Section 2.
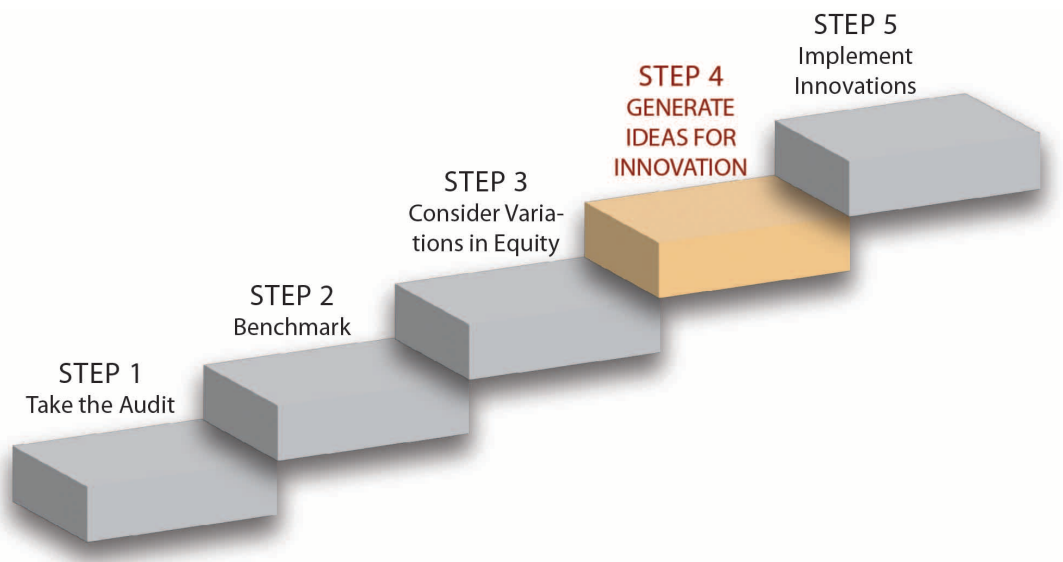

Figure 10: Step 4 of the Orientation and Onboarding System Toolkit

4.1 Roles and Responsibilities

The process of design thinking values the diverse perspectives which can emerge from group conversations and debates. (See "Overview of the Orientation and Onboarding System Toolkit.")

In consultation with your Equity Initiative Committee, the Leader(s) of your Equity Initiative should decide how to best engage different groups of employees in discussions about innovations that can strengthen the equity of your organization's Orientation and Onboarding System.

Option 1: Your organization could invite the members of your DEI Committee to participate in one (or more) brainstorming activity.

Option 2: You might convene discussion groups (for example, brown bag lunches, focus groups, etc.) with employees who are affiliated with specific demographic and social identity groups to discuss innovations in your Orientation and Onboarding System that could address some of their priorities and preferences.

Option 3: Your Equity Initiative Leader(s) could create a "suggestion box" to invite ideas from employees throughout the organization.

4.2 Step 4 Tasks (Section 1 and Section 2)

Section 1: Tasks to Assess the Equity of Your Orientation and Onboarding System

As noted in the Overview of this Toolkit, Work Equity recognizes that your organization has at its disposal seven mechanisms that have the potential to address some of the root causes of inequities embedded in your organization's employment systems. We refer to these mechanisms as Levers for Change. (Please see the "Overview of the Orientation and Onboarding System Toolkit" for the discussion of the Levers for Change.)

Each of the nine questions in the audit of the Orientation and Onboarding System (Step 1) addresses one of the seven Levers for Change:

1. Policies (Question #1)
2. Practices (Question #2)
3. Planning/Evaluation (Question #3)
4. Assignment of Roles and Accountabilities (Question #4)
5. Workplace Culture (Question #5)
6. Workplace Climate (Question #6)
7. Communication (Question #7)

Task 1: Rank Levers for Change from the Audit Items

> Directions:
>
> The Leader(s) of your Equity Initiative should put the average scores of your organization's responses to the Audit questions for orientation and onboarding that you calculated in Step 1.
>
> First, in Worksheet #7 (next page) enter the scores into Column A for each of the Levers for Change (that is, the scores for each of the items computed for Worksheet #3). Then complete Column B, ranking each of the Levers for Change by comparing the scores for each Lever.

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Orientation and Onboarding System Toolkit Worksheet #7
Ranking the Scores for the Levers for Change in the Orientation and Onboarding System

	Column A: What was your organization's score for each lever for change? (from Worksheet 3) Put these scores in the open boxes below.	Column B: How strong is each lever for change? Rank order them for weakest to strongest. 1 = weakest lever (lowest mean score) 7 = strongest lever (highest mean score)
Policy Lever for Change		
1. To what extent does your organization have written policies which ensure that employee access to orientation and onboarding is fair?		
Practice Lever for Change		
2. To what extent has your organization adopted practices that promote the inclusion of new employees?		
Planning and Evaluation Levers for Change		
3. To what extent does your organization routinely audit the fairness of the Orientation and Onboarding System?		
Assignment of Roles and Accountabilities Lever for Change		
4. To what extent does your organization hold one or more employees (e.g., supervisors; Director of DEI, etc.) accountable for monitoring the inclusivity of orientation and onboarding experiences?		
Worksheet continued on the next page ☞		

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Worksheet #7 (continued)

	Column A: What was your organization's score for each lever for change? **(from Worksheet 3)** Put these scores in the open boxes below.	Column B: How strong is each lever for change? Rank order them for weakest to strongest. 1 = weakest lever (lowest mean score) 7 = strongest lever (highest mean score)
Workplace Culture Lever for Change		
5. To what extent do the actions of your organizational leaders indicate that they believe there is a connection between the organization's DEI initiatives and the inclusivity of orientation and onboarding?		
Workplace Climate Lever for Change		
6. To what extent does your organization welcome diverse perspectives during orientation and onboarding?		
Communication Lever for Change		
7. To what extent does your organization have practices that provide recently hired employees with equitable access to information about orientation and onboarding?		

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The members of your Equity Initiative Committee can consider the rankings of the Levers for Change in your Orientation and Onboarding System and identify opportunities to build on those that are already **strong** (that is, those that are **ranked the highest**). Summarize the observations below.

_____

_____

The members of your Equity Initiative Committee can identify ways to strength those Levers for Change that are currently **weak** (that is, those that are **ranked the lowest**). Summarize the observations below.

_____

_____

Continue to next page ☞

Task 2: Highlight Ideas for Innovation in the Orientation and Onboarding System

Orientation and Onboarding System Toolkit Worksheet #8
Your Ideas for Innovation in Levers for Change in the Orientation and Onboarding System

Directions:
The members of your Equity Initiative Committee can use the worksheet below to specify possible innovations that can address root causes of inequities.

	Levers for Change	Your Ideas for Innovation	Organizational "Stakeholders" (including decision makers) in this Innovation
	Orientation and Onboarding Policies		
	Orientation and Onboarding Practices	Please Note: Task 3, below, elaborates on practice innovations because they can have a "multiplier effect," opening the doors for changes in other parts of the Orientation and Onboarding System. You might want to save your ideas for Practice Innovation until you have completed Task 3.	
	Planning and Assessment (e.g., data collection) Related to Orientation and Onboarding		
	Assignment of Roles and Accountabilities for the Equity of Orientation and Onboarding		
	Workplace Culture Related to Orientation and Onboarding		
	Workplace Climate of Inclusion Related to Orientation and Onboarding		
	Communication Related to Orientation and Onboarding		

Section 2: Orientation and Onboarding Practice Innovations

Task 3: Consider Ideas for Practice Innovation in Orientation and Onboarding

Directions:

Your organization may want to adopt a design thinking process to imagine possible innovations in orientation and onboarding.

> *Design thinking is a process that can help your Equity Initiative Committee to move from insight to action by brainstorming ideas for your organization to pilot. You can leverage design thinking to create customized equity solutions for your organization.*

The members of your Equity Initiative Committee can use Worksheet #9 (next page) to guide conversations about selected best practices innovations.

Orientation and Onboarding System

Orientation and Onboarding System Toolkit Worksheet #9
Options for Practice Innovation

	Is this option available? Yes or No	If this option is not available, could it be adopted by your organization? Yes or No	If this option is available to some but not all employees, could it be offered to groups of employees who currently cannot access this option? **Specify which employee groups.**
Do supervisors/managers schedule meetings with the new employees to review the job description and the workplan?			
Does your organization provide all new employees with information about "navigating" the organization?			
Do supervisors periodically check-in with new employees (for example, at the end of each week during the first month) to see how the onboarding is proceeding?			
Does your organization provide information about benefit choices to new employees?			
Does someone from the organization provide all new employees with an orientation to the employee section of the website, if there is such a section?			
Does your organization provide all new employees with contact information for people who can provide help if questions arise after the orientation?			
Does your organization structure a time for meeting with members of their team/department so that team members can be introduced to the new employee and can become familiar with some of the contributions that the new employee is expected to make?			
Does someone from the organization provide new employees with an introduction to the technologies and platforms used by the organization?			
Does your organization expect that supervisors/managers will welcome all new employees, for example by meeting them when they first arrive?			
Does your organization recognize new employees throughout the organization, for example in a welcome email or on the website?			
Does the organization communicate its valuing of Diversity-Equity-Inclusion during the orientation?			
Does the organization provide information about Employee Resource Groups to new employees?			

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Task 4: Prioritize Your Ideas for Orientation and Onboarding Practice Innovation

> Directions:
> The members of your Equity Initiative Committee can use the worksheet below to list their top ideas for orientation and onboarding practice innovation.
> The Leader(s) of your Equity Initiative can develop an "elevator speech" that can be used to present your recommendations to top managers, decision-makers, and other key stakeholders.

Orientation and Onboarding System Toolkit Worksheet #10
Your Ideas for Orientation and Onboarding Practice Innovation

Ideas for Possible Innovation	Implementation Factors
Idea # 1: Summary of Key Components	• Purpose (Goals/Objectives) Draft Statement _____ • Expected (Measurable) Outcomes Draft Statement _____ • Pre-implementation Preparation (e.g., informational materials, training, etc.) Draft Statement _____ • Announcement/Enrollment Draft Statement _____ • Steps 1, 2, 3, etc. of Implementation Draft Statement _____ • Estimates of Time and Resources Needed for Implementation Draft Statement _____
Idea # 2: Summary of Key Components	• Purpose (Goals/Objectives) Draft Statement _____ • Expected (Measurable) Outcomes Draft Statement _____ • Pre-implementation Preparation (e.g., informational materials, training, etc.) Draft Statement _____ • Announcement/Enrollment Draft Statement _____ • Steps 1, 2, 3, etc. of Implementation Draft Statement _____ • Estimates of Time and Resources Needed for Implementation Draft Statement _____
Worksheet continued on next page ☞	

Orientation and Onboarding System Toolkit Worksheet #10 (continued)

Ideas for Possible Innovation	Implementation Factors
Idea # 3: Summary of Key Components	• Purpose (Goals/Objectives) Draft Statement _____ • Expected (Measurable) Outcomes Draft Statement _____ • Pre-implementation Preparation (e.g., informational materials, training, etc.) Draft Statement _____ • Announcement/Enrollment Draft Statement _____ • Steps 1, 2, 3, etc. of Implementation Draft Statement _____ • Estimates of Time and Resources Needed for Implementation Draft Statement _____

Task 5: Present Idea(s) to Leaders, Decision-Makers, and Other Stakeholders

Share your ideas for innovation with people/groups that might be stakeholders and decision-makers orientation and onboarding, as well as people who will determine whether the innovation can be pilot tested.

☞ Go to Step 5 of the Orientation and Onboarding System Toolkit: Implement Pilot of Innovations
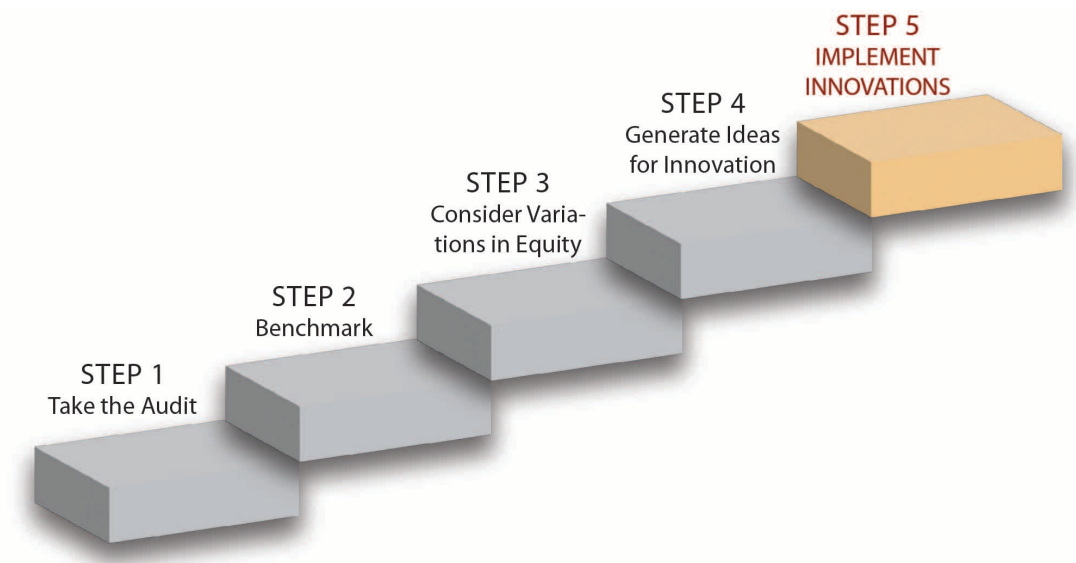

Figure 11: Step 5 of the Orientation and Onboarding System Toolkit