Guide to the LeadingAge Minnesota Foundation's Onboarding Toolkit

PURPOSE

The LeadingAge Minnesota Foundation's Onboarding Toolkit is intended to provide members with tools and resources that will foster a culture of team member engagement—resulting in increased staff retention and improved workplace productivity. This toolkit is based on quality improvement and performance excellence principles.

The tools and resources are organized around five core principles of team member engagement. These principles include:

1. **Welcoming a Team Member to the Organization**
2. **Introduction to the Organization's Culture**
3. **Leveraging an Organization's Mission, Vision, and Values**
4. **Career Pathways and Role Specific Challenges**
5. **Teamwork and Building Relationships in the Workplace**

For each of the core principles, materials provided include the following sections:

a) **Facilitator Guide**
b) **Readiness Assessment**
c) **Training Documents & Supporting Tools**

The tools and resources in this program can be used to address multiple principles. The *Correlation of Activities to Principles* document demonstrates how each activity relates to the various principles.

USE OF SUPPORTING TOOLS AND RESOURCES

These materials are designed to enable each organization to customize the tools and resources to community specific culture, resources, and processes. The tools, trainings and activities are all formatted in standard Microsoft® Office™ software. Sections intended to be customized appear in RED text.

ROLE OF AN ONBOARDING FACILITATOR

We recommend identifying an Onboarding Facilitator. The Facilitator may be the human resources representative, staff education representative, housing director, executive director, administrator, training coordinator, quality improvement leader, a member of the management team, an individual external to the organization or a

collective group of these individuals. Facilitators should have a strong understanding of the organization's current orientation and onboarding process. Likely, it is the person who is currently responsible for your orientation process. This person will be responsible for implementing or coordinating the implementation of the Onboarding Toolkit.

OVERVIEW OF TOOLKIT MATERIALS

There is a separate section in the Onboarding Toolkit for each of the 5 core principles. Each section contains the following components:

1) Readiness Assessment

> The Readiness Assessment tool can be used to assess your organization's current status related to the identified principle within your organization.

2) Facilitator Guide

> The Facilitator Guide includes the following sections:

> a) Importance of the Principle
> b) Correlation to the LeadingAge Minnesota Performance Excellence in Aging Services Program Criteria
> - The LeadingAge Minnesota Performance Excellence in Aging Services Program was established in 2017 to support members in creating a culture of performance excellence and quality. One component of the program is a self-assessment for each of the performance excellence categories, including workforce. The Onboarding toolkit is designed to help organizations successfully meet the Workforce criteria within the Performance Excellence program. You do not have to be a participant in the Performance Excellence program to use and benefit from this toolkit.
> c) Instructions for completing the Readiness Assessment
> d) Tools and Resources, which may include
> - PowerPoint training modules supplemented with speaker's notes
> - Handouts
> - Team activities
> - Discussion questions for team members
> e) Guidance for Facilitating Quality Improvement Efforts

HOW TO USE THE TOOLKIT

1) Prioritize and select a Core Principle(s) for your initial focus.
2) Complete the Readiness Assessment for the selected Core Principle(s).
3) Evaluate the Readiness Assessment results and identify targeted areas of opportunity.
4) Facilitate a quality improvement discussion with all individuals currently involved in the onboarding program. The discussion should include a broad overview of the value of engaging in continuous quality improvement, discussions surrounding current orientation and onboarding program offerings (areas of strength and overall opportunities), a review of the available tools and resources that could be leveraged to address opportunities, and a group dialogue related to the organization's intended use of recommended tools and resources.
5) Develop and implement an action plan to address identified opportunities for improvement.
6) Review effectiveness of action plan and revise as needed.
   This process is further summarized in chart below:
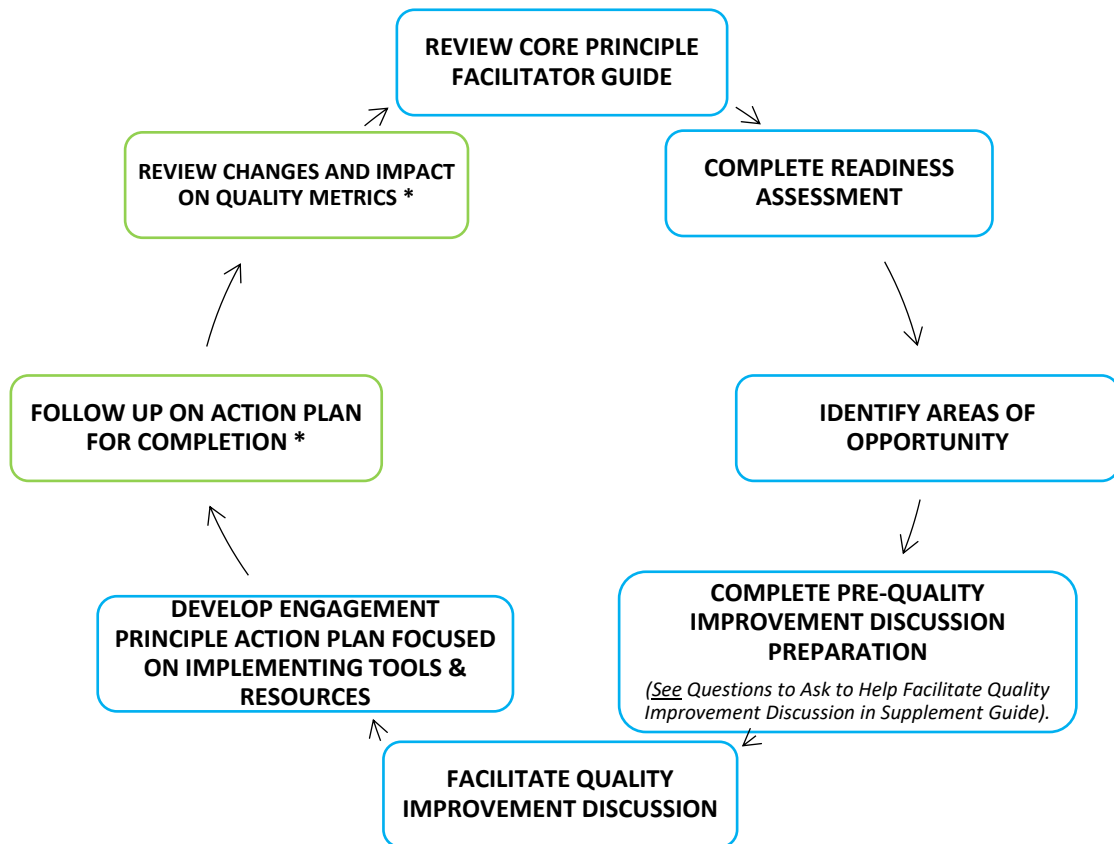
Action Plan Follow-Up, Reviewing Changes, and Impact on Quality Metrics should be incorporated into the organization's quality improvement processes.

COMMUNICATING CHANGES

All members of the leadership team should understand and be able to articulate the quality and performance reasons for changing the onboarding process.

Keep in mind the following change management principles:

Share the Story

Communicating an authentic and empathetic message may help generate the support and buy-in needed to make a powerful positive change in the lives of residents, family members, and the daily work environment of each team member.

Understand the Power of Influence

The leadership team alone cannot tackle the goal of increasing team member engagement and improving staff retention. Leadership needs the help and support of many team members, residents, family members, vendors, suppliers, and members of the broader local community.

To increase influence and buy-in, be personable, communicate focus, and execute on solutions. Be proactive. Answers questions, "How will it affect me?" "Why?" "What is in it for me?" at the resident, family, and team member level. This will improve your ability to influence others to join in the cause.

Know What to Expect

Expect to hear resistance to change. Take time to identify those individuals that support the transition and those who will, or are highly likely to, resist the change. Respect everyone's right to have their own reactions, and strategize regarding communicating with those that may undermine the change effort.

Set the Expectation of Continuous Improvement

As leaders, we must set the expectation that our human capital strategies will have to continue to change and evolve to keep pace with changing expectations of team members, families, and residents. Plan and schedule this project implementation with adequate time to evaluate whether the changes are having the desired impact.