

New Employee Understanding of Public Health Practice: Orientation to Peel Public Health

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Key Messages

1. Organizational socialization, also referred to as onboarding, is a process that takes an employee from recruitment to the performance of their job during the first year of employment. Orientation is a subset of organizational socialization and typically occurs during the first weeks of employment.
2. The literature supports the widely held belief that socialization activities influence both early newcomer adjustment outcomes, such as increased role clarity and decreased anxiety, as well as longer term organizational outcomes such as increased commitment, effective job performance and decreased intention to quit.
3. Socialization practices are the methods by which employees are brought successfully into the culture of the organization. When newcomers are grouped together and taken through a systematic process they are more likely to adopt organizational norms. They are also likely to feel reduced stress, increased self efficacy, and to be more satisfied with their job and with their fit to the organization.
4. Time invested in organizational socialization should be directed towards those elements of the organization that are both important and difficult to master on one's own. These elements are: goals and strategy, language and task proficiency.
5. The opportunity for interpersonal interaction, particularly with experienced and influential organizational members, is important for successful organizational socialization.
6. Early, significant task assignment is important as an opportunity to enable contribution to the organization and as a method of building networks.

Executive Summary

Issue and Purpose of the Rapid Review

Currently, orientation of new employees to Peel Public Health (PPH) does not occur at the departmental level. Divisional orientation activities do not regularly include content related to the practice of population health, or content about the public health core competencies. The Medical Officer of Health has requested the creation of a program that informs new employees of these key concepts of public health practice. The purpose of this rapid review is to understand from the literature what orientation and organizational socialization practices support understanding of key organizational concepts.

Research Question

What are effective orientation and organizational socialization practices for new employees?

Literature Search and Critical Appraisal

All searches conducted were limited from 2000 to 2012. The sociological and business data bases were searched. Grey literature was extensively searched. This review is based on two, 2012, good quality textbook chapters of synthesized literature on organizational socialization.

Synthesis of Findings

The research literature identified empirical studies that show direct as well as mediating links between particular socialization practices, employee adjustment outcomes and long-term outcomes such as job satisfaction and organizational commitment. Activity to enhance early employee adjustment outcomes has benefit later in the organizational life of the employee. Further, researchers propose a theory known as Socialization Resources Theory. This theory is derived from a review of both academic and practitioner literature. It suggests that newcomers experience stress upon entry and therefore require resources to facilitate adjustment. Seventeen resources are grouped according to timing of implementation during the period of newcomer

adjustment. A further typology of orientation practices groups activities in three areas, regardless of timing: the Inform-Welcome-Guide. Each activity and the available evidence is discussed.

Particular socialization methods include orientation and training and the selective use of institutionalized or individualized socialization tactics. These tactics either promote the status quo and encourage adoption of certain key concepts or, conversely, encourage autonomy and innovation. Other methods include use of experienced employees as socialization agents, the need for extensive feedback to reinforce employee contributions and the importance of early, significant task assignment.

Finally, three content areas were identified in the literature. They are organizational goals and strategy, organizational language, and knowledge and skills necessary for task proficiency. This content equips new employees with knowledge of the values of the organization, imparts knowledge of insider language and builds skills for successful task completion.

Applicability and Transferability

These findings were useful in developing an orientation strategy. Key content should be reinforced through multiple layers of orientation activity. Attention must be given to change management and workload especially where supervisors are involved. Senior management needs to be engaged as interactions with them influence outcomes for employees.

Recommendations

These findings should be incorporated into the development of a department-wide plan to structure organizational socialization activities during the first year. Orientation sessions focused on building knowledge of key organizational concepts will be developed centrally, under the Workforce Development strategy. The key messages of the review should be communicated widely as they are relevant to all management staff.

1 Issue

In 2009, Peel Public Health (PPH) launched its 10-year strategic plan and set the department on an exciting but challenging path of organizational change. A key element in the strategic plan is the Public Health Way (PHW), a fundamental philosophy of public health practice. To practice public health in the PHW is to become familiar with the practice of population health and to think of the community as the client, rather than individuals. The knowledge and skills that are essential to this practice are set out by the Public Health Agency of Canada in the Core Competencies for Public Health.

The PHW and the Core Competencies must be well understood as new employees learn their roles and functions in the organization. The Medical Officer of Health has requested the creation of an orientation program addressing the PHW and the Core Competencies for Public Health. The purpose of this rapid review is to understand which orientation and organizational socialization practices support delivery of key organizational concepts and lead to new employee adjustment and job readiness.

Anecdote

Frequently, new employees hired to PPH are also new to the practice of public health. Some are new graduates, eager to embark on a public health career; others come with skills and experiences from clinical settings only. A recent graduate of a nursing degree program who had worked in the hospital setting was hired for a public health nurse position. After attending the Health Services orientation session on her second day of work, she asked her supervisor “What will I be doing? My husband asked me last night and I didn’t know how to explain public health work.” The supervisor felt puzzled, thinking something had clearly been missed if, after recruitment and some orientation, the new hire was not able to articulate public health practice.

2 Context

All employees have had an opportunity to be oriented to the concepts of the Public Health Way by the Medical Officer of Health during 2012. New employees hired since then need to be provided these basic messages and furthermore, be given the means to develop the knowledge and skills necessary to practice public health. These skills include content on core competencies and the foundational concepts of the Public Health Way. The work of creating this new orientation program is part of the Workforce Development strategy.

PPH hired 227 employees from 2010 to 2012. Eighty-nine percent (202 employees) were classified as temporary. This temporary count only includes unique individuals. This means that the data reflect actual numbers of new temporary employees coming into the organization. If an employee was hired in 2010 and rehired in 2011, or if they were hired and rehired in the same year, they are only counted once based on their unique employee identification number. In addition, 75 students were hired for paid, short-term assignments. Refer to Table 1.

TABLE 1

	NEW EMPLOYEES HIRED BY YEAR			
Year	Regular	Temporary	Students	Total
2010	14	75	31	120
2011	5	79	22	106
2012	6	48	22	76
Total	25	202	75	302

Both regular and temporary employees participate in orientation as temporary employees often move on into long term employment. The trajectory of these temporary employees requires further investigation to determine optimal sequencing of orientation activities.

Orientation at PPH currently includes

- Corporate overview

- Health Services organizational structure and departmental overview
- Strategic priorities
- Programs and services at divisional and team level
- Public Health core competency requirements related to position
- Work assignment description for particular role.

For a full list, refer to Appendix A. Each organizational layer plays a different role in orienting new employees during the transition period. The current Health Services orientation session is held twice per year, in May and November. In the last three years, between 41 and 66 new PPH employees attended the Health Services orientation. The Health Services orientation is the only consistent orientation process currently in place and yet only 60 – 70% of new PPH employees attend in any given year.

Definitions Used in this Report

The literature uses specific terminology when dealing with the broad topic practitioners commonly refer to as ‘orientation’. The following terms are used throughout the report.

- Organizational socialization (OS) is the *process* through which an individual employee learns about and adjusts to an organization, job and role. Socialization can occur any time there is change in an employee’s role, including when moving to a new role within the same organization. For this report, OS will refer to the initial period, up to one year, of socialization upon entry to the organization.¹
- Organizational socialization *practices* are defined as “organization-initiated activities, programs, events, and experiences that are specifically designed to facilitate newcomers’ learning, adjustment, and socialization into a job, role, work group, and organization so that they can become effective members of the organization”.¹

- Organizational socialization practices can be carried out in a variety of ways ranging from an organized, step-wise, transparent process to an as-needed, informal, variable set of events. These ranges of methods are called socialization tactics and they are widely discussed in the literature.
- Onboarding is another term currently used in the literature and refers to “all formal and informal *practices*, programs and policies enacted or engaged in by an organization or its agents to facilitate newcomer adjustment”². At the end of the organizational socialization process, the employee is ‘onboard’.
- Orientation is regarded as a “specific type of onboarding program (or possibly, set of programs), typically formal, with a set duration ranging from hours to days.” Orientation programs tend to highlight organizational issues most pertinent to new employees ¹.
- Training is referred to as “one of the most formal and planned socialization practices” that focuses on necessary knowledge and skills ¹.

3 Conceptual Model

Orientation is an element of a larger organizational socialization program through which employees are socialized into an organization. A conceptual model is depicted in Appendix B. The model illustrates that orientation of new employees is part of a socialization continuum. The continuum begins with recruitment, continues to the end of the first year when organizational socialization is complete, and extends through to the ongoing employment and talent management of an employee. In addition, the Public Health Way and Core Competency orientations are shown as distinct components of the orientation of new staff, integrated into the other layers of orientation which occur at various levels of the organization.

4 Literature Review Question

The research question is:

What are effective orientation and organizational socialization practices for new employees?

In PICO format, this question is:

Population (P)	New Employees
Intervention (I)	Orientation, Socialization Practices, Methods
Comparison (C)	None
Outcome of Interest (O)	Newcomer adjustment

5 Literature Search

During late November and early December 2012, the following bibliographic databases were searched through the Ovid interface: Medline, Medline In-Process & Other Non-Indexed Citations, Healthstar, Cochrane Database of Systematic Reviews and PsycINFO. In addition, ABI Inform was searched through the ProQuest platform and CINAHL, Nursing and Allied Health, Sociology Index and Health Business Elite on the EBSCO platform.

The search strategy included both controlled vocabulary, such as MeSH (Medical Subject Headings), and keywords. The main search concepts were “orientation”, “organizational socialization” and “newcomer” or “new hire”. Filters used in ABI Inform and EBSCO databases limited retrieval to academic or scholarly journals and in Medline limited retrieval to systematic reviews and/or meta-analyses. Additional search limits included the English language and items published 2000 to November 2012.

A search of the World Wide Web, websites of Canadian business schools, and other topic specific websites yielded grey literature. Key informants were consulted regarding knowledge of existing guidelines and theories related to orientation, onboarding, training of new employees and adult education. Appendix C outlines further details of key literature search strategies.

6 Relevance Assessment

Two independent reviewers assessed relevance of the search results based on (1) title, (2) title and abstract, and (3) full-text and resolved any discrepancies through discussion.

The inclusion and exclusion criteria were as follows:

Inclusion Criteria:

- Qualitative or quantitative research design
- Organizations with professional staff in settings similar to those in Canada
- New employee, new hire, new recruit, newcomer
- Orientation interventions, methods, tactics, strategies, formats
- Papers which link orientation interventions to outcomes, e.g. newcomer adjustment
- English language
- Published in last 10 years

Exclusion Criteria:

- Clinical skills focus and hospital specific
- Recruitment only focus
- Orientation/onboarding manuals, checklists, guidelines and toolkits for specific organizations/companies.

7 Search Results

The search results yielded a total of 314 papers and there were 24 duplicates. Of the remaining 290 papers, 273 papers did not meet the relevance criteria based on a title and abstract review. A total of 17 full-text papers were retrieved and assessed according to inclusion/exclusion criteria. Of the 17 papers reviewed, five were excluded as duplicates; three focused on a non-relevant population; two reported non-relevant outcome data; two were

excluded based on study design and one paper could not be located in a timely fashion and was therefore excluded. In the end four papers, two of which are book chapters, were retained for quality assessment. Refer to Appendix D for the Literature Search Flowchart.

8 Critical Appraisal

Two reviewers critically appraised each document. Reviewers used the Critical Appraisal Skills Programme (CASP) review tool to assess the systematic review and the Quality Assessment Tool for Quantitative Studies from the Effective Public Health Practice Project to appraise the single study. The two book chapters were appraised using the Quality Rating for Book/Book Chapter appraisal worksheet that has been adapted internally.

The reviewers rated the single study as weak and it was excluded. The systematic review had a strong quality rating, but was included in one of the book chapters. Therefore the synthesis is based on the two book chapters.

The two book chapters had a strong rating for quality. It should be noted that although the book chapters rated positively, their methods of analysis of the primary studies are not as rigorous as that of a systematic review. In this rapid review the strength and quality of primary material is mentioned when it is available.

9 Description of Included Studies

The two book chapters included in this rapid review are from the same publication – The Oxford Handbook of Organizational Socialization. The publication is a volume of the Oxford Library of Psychology, published in 2012. Data extraction tables are found in Appendix D.

Saks & Gruman – Chapter 3: Getting Newcomers On Board: A Review of Socialization Practices and Introduction to Socialization Resources Theory¹

Written by two Canadian professors of organizational behaviour, Dr. Alan Saks and Dr. Jamie Gruman, the chapter included a review of studies (96 references cited) that reflected varied settings, ranging from technology, hospital, education, business, manufacturing and service based organizations. The chapter is in the form of a narrative synthesis and while the authors discuss previous research in some detail they do not appraise the material for quality. Chapter references and comments in the body of the chapter point to use of both qualitative and quantitative methods, including two meta-analyses. Many of the studies cited are cross sectional in nature and there is some mention of longitudinal studies.

The chapter focuses on the experience of organizational entry from the perspective of the new employee, and what socialization programs should achieve if they are to be effective. The five most widely examined organization-initiated interventions are presented. The authors also conducted a review of the academic research to identify gaps for future study. Finally, a new theory titled Socialization Resources Theory is proposed. It revolves around 17 socialization resources that organizations should provide for new employees.

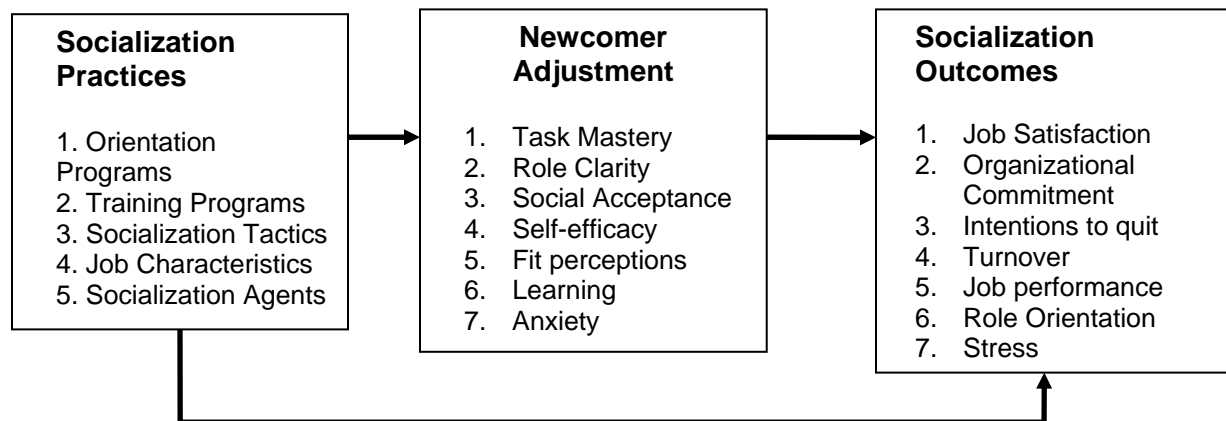
Main Findings

Organizational Socialization Practices and Outcomes

The chapter reports on the relationship between the five most studied organizational socialization practices and associated outcomes. Figure 1 illustrates the proximal outcomes, known as newcomer adjustment outcomes, which are shown to have a mediating effect on the distal outcomes. The five organizational socialization practices listed in the first part of Figure 1 have a direct effect on the distal outcomes. These distal outcomes are job satisfaction, organizational commitment, intentions to quit, turnover, job performance, role orientation and

stress. Authors also note that although learning is shown as a short-term outcome, it precedes many of the newcomer adjustment outcomes shown in Figure 1.

Figure 1: Socialization Practices, Newcomer Adjustment and Socialization Outcomes



Source: Saks and Gruman, p. 31

Orientation and Training

The evidence addresses the importance of orientation programs as an integral part of the organizational socialization process. Research regarding orientation is minimal, considering that orientation programs are widely used in practice. However, as seen in Figure 1, orientation programs have been shown to promote learning tasks, reduce anxiety and stress, and ultimately, enhance job satisfaction and organizational commitment.

Authors of the chapter conclude that in practice, orientation programs should be:

- structured both formally and informally
- formatted as fairly short in duration (from hours to days)
- focused on organizational issues
- offered early after entry into an organization.

Authors also agree that training is a useful means of imparting knowledge and skills to new employees. More training is preferable than less. Training can strengthen self-efficacy, lower anxiety, and lead to more positive job attitudes¹.

Socialization Tactics

Table 2 below summarizes the three broad factors that are important in implementing socialization practices. The so-called ‘socialization tactics’ describe the way new employee experiences are structured by the organization. These tactics exist on a continuum of ‘institutionalized’ tactics at one end and ‘individualized’ tactics at the other. The content of Table 2 reflects theory by Van Maanen and Schein (1979)³ who identified the range of socialization tactics. These tactics were subsequently investigated through empirical studies by Jones (1986)⁴, who identified and developed further understanding of six dimensions of organizational socialization tactics.

Table 2: Socialization Tactics

Broad Factors	Socialization Tactic Dimensions	Explanation
Context	Collective vs. Individual	Groups newcomers for collective, common experiences vs. isolated, unique experiences
Context	Formal vs. Informal	Segregates newcomers from experienced employees for a defined period and exposes them to specific activities vs. more random, on the job learning
Content	Sequential vs. Random	Uses a distinct and identifiable series of steps leading to assumption of role vs. ambiguous, changing pathway
Content	Fixed vs. Variable	Follows a precisely known schedule of steps leading to role assumption with clear target date for completion vs. unspecified timelines for new role assumption
Social	Serial vs. Disjunctive	Socializes newcomers using experienced members who guide and serve as role models vs. no use of role models
Social	Investiture vs. Divestiture	Confirms and embraces identity of newcomer and seeks to build upon this vs. erodes previous identity and personal characteristics

Source: Saks & Gruman, p. 35

Jones (1986)⁴ studied the relationship between socialization tactics and newcomer adjustment. He found that the **collective, formal, sequential, fixed, serial and investiture** tactics were the most successful in encouraging newcomers to adopt the norms of the organization. This grouping of tactics, which offer structure, is known as institutionalized socialization tactics. Conversely, individual, informal, random, variable, disjunctive and divestiture tactics tend to allow newcomers to question the status quo and to evolve their own approach to their work and role. These tactics are referred to as individualized socialization tactics.

A recent (2007) meta-analysis⁵ reflects a detailed study of the correlations between particular socialization tactics and longer term outcomes. It concluded that institutionalized socialization tactics promote the organizational status quo and decrease role ambiguity, role conflict and intentions to quit. Institutionalized tactics also tend to increase perceptions of fit with the organization, self-efficacy, social acceptance, job satisfaction, organizational commitment, job performance. Thus, the use of institutionalized tactics is particularly helpful in achieving positive adjustment outcomes for employees during their first six months of employment¹. In contrast; individualized tactics create autonomy, encourage new employees to challenge the status quo and may foster anxiety due to the lack of structure¹.

Job Characteristics

A study by Katz (1980)⁶ examined the importance of job characteristics at various times during an employee's career. Job characteristics are those elements which define the job, such as: skill variety, task identity, task significance, autonomy and job feedback. Katz found that in the first three months of employment, employees given significant work were more satisfied with their job. Also, he found that in the first three months of employment more autonomous work had lower score on job satisfaction. This finding reversed at the four month mark. This suggests

that employees be given meaningful, well structured work as early as possible. Another study, (Rollag 2005)⁷ confirmed that work requiring interaction with a variety of others was most important to the socialization of new employees during the early stages of employment. This enables the development of networks. New employees are eager to become integrated into the workplace, to feel that they are contributing, and to develop a sense of security and identity. Their work also found that interpersonal feedback as well as positive job feedback facilitates a new employee's adaptation. This is helpful to newcomers because they are trying to quickly establish a sense of importance and clear role in the organization.

Socialization Agents

Socialization agents are the members of the organization who help facilitate the adjustment of the newcomer by helping to reduce stress and promote positive job attitudes. They include co-workers, supervisors, senior leaders and sometimes clients or customers. Their roles with respect to newcomers are sometimes informal but are nevertheless important in helping the newcomer transition from an 'outsider' to an 'insider'. Studies have found that socialization agents serve many functions, including providing information and social support to newcomers, with supervisors providing primarily role information and coworkers providing group information. No clear framework has been offered in the literature that clearly defines specific behaviours of various socialization agents and connects them to particular outcomes¹.

Socialization Resources Theory

Saks & Gruman identify a significant gap between organizational socialization research and practice. A theory that links evidence and practice is developed by Saks & Gruman. The framework is called Socialization Resources Theory (SRT). The fundamental principle of SRT is that new employees experience considerable stress upon entry into a new role and their

adjustment will be aided by access to necessary resources. SRT suggests 17 specific resources that should be offered to new employees and includes suggestions around timing.

Table 3: Socialization Resources Theory (SRT)

Period	SRT Dimension		Describes the extent to which...
Prior to Entry	1	Anticipatory Socialization	contact is made with new hire before start date
Immediately After Entry	2	Formal Orientation	the nature of orientation received was planned e.g. duration, methods, who was involved, activities
	3	Proactive Encouragement	new hire has been told to ask for help, introduce self
	4	Formal Assistance	new hire has been assigned a formal mentor/buddy
Following Orientation - First 6 months - Social Capital Resources	5	Social Events	social events are held e.g. office parties, lunches
	6	Socializing Agents	experienced employees (insiders) have made efforts to welcome and assist the new hire
	7	Supervisor Support	supervisor demonstrates caring and assists new hire to adjust
	8	Relationship Development	time is given for new hire to meet and get to know members of the organization
Following Orientation - First 6 months - Work-related Resources	9	Job Resources	office space and required tools are ready upon arrival
	10	Personal Planning	expectations and work goals have been communicated by supervisor
	11	Training	formal training is provided, with appropriate content and format
	12	Assignments	early assignments consider important job characteristics
	13	Information	organizational members provide new hires with relevant information
	14	Feedback	new hire is given accurate and timely feedback on job performance
	15	Recognition & Appreciation	new hire receives praise and acknowledgement for contributions and performance
Following Formal Socialization/Onboarding	16	Follow-up	organization follows up after formal orientation complete to check in and provide support
	17	Program Evaluation	organization asks new hires for feedback to evaluate orientation

Source: Adapted from Saks & Gruman, 2012 pp. 48-51

Klein & Polin - Chapter 14: Are Organizations On Board with Best Practices Onboarding?²

As in the previous chapter, the authors present a narrative review of the literature and they do not quality appraise the material. They also comment on the lack of research, point to areas for future study and propose a guide for practitioners. The 121 citations in the reference list reflect both academic literature, such as longitudinal studies and theoretical frameworks, and practitioner literature. Additionally, the authors discuss in detail a descriptive survey they conducted with nearly 500 human resource professionals in December 2010. The data for the survey were analyzed using quantitative methods.

Main Findings

Inform-Welcome-Guide Framework

Klein & Polin use the Inform-Welcome-Guide (IWG) framework to summarize the academic socialization literature. The overall focus is on “providing newcomers with information, materials, and experiences to help them learn what they need to know to be successful in their new roles and in the organization”². Their framework differs from SRT as it divides the sections by type of activity, rather than time frame. These authors believe that types of events may occur more than once and at different times. This framework is derived from a typology of practices elucidated by Klein and Heuser (2008)⁸. Refer to Table 4.

TABLE 4:**Inform-Welcome-Guide Framework**

Categories		Onboarding Activities
Inform	Communication	Efforts made to facilitate communication with newcomers. Includes both the provision of one-way messages and opportunities for two-way dialogues.
	Resources	Materials or assistance made available to new hires. These efforts differ from communication in that the new hire has to take the initiative to access them.
	Training	Efforts made to facilitate the systematic acquisition of skills, behaviours, knowledge.
Welcome		Opportunities provided for new hires to meet and socialize with other organizational members and/or celebrate the arrival of the newcomer.
Guide		Personal guide provided for each new hire.

Source: Adapted from Klein & Polin, 2012. Based on a framework attributed to Klein & Heuser, 2008

The concept of new employee pro-activity is introduced by the authors as being integral to the Inform-Resources component of the framework. The new employee is expected to take initiative for accessing resources and engaging in learning. For its part, the organization must ensure that resources are easy to access and give clear direction to new hires to ask questions. The importance of learning itself must be highlighted rather than a focus solely on performance¹.

Socialization Content Areas

Reflecting on findings from a survey of human resources professionals conducted by the authors, Klein and Polin suggest that organizations should direct their energy into “those content areas that are both of high importance and difficult for people to master on their own”². Nearly 500 human resources professionals from a variety of industries and organizational sizes identified three content areas out of twelve that are of greatest importance and most difficult for

new employees. These areas are: goals and strategy, language, and task proficiency, shown in **bold** in the following chart:

Twelve Socialization Content Areas (in alphabetical order)

Culture and Values	Politics
Goals and Strategy	Rules and Policies
History	Social relationships
Inducement	Structure
Language	Task Proficiency
Navigation	Working Relationships

Source: Adapted from Klein & Polin, 2012 p. 281

Practitioner Literature Findings

The authors found considerable agreement with respect to organizational socialization practices reported in the practitioner literature. The practitioner literature included white papers written by consulting firms, articles from practitioner periodicals and advice columns published in industry journals and online. This body of literature outlined seven common principles, many of which confirm previously discussed material:

- 1. Treat Organizational Socialization as a Process:** schedule activities at various times, in an organized way.
- 2. Reinforce Culture through Organizational Socialization:** align organizational socialization activities with the organization's cultural image that was portrayed to the employee during recruitment.
- 3. Use a Team Approach to Organizational Socialization:** use of socialization agents is integral to the process; introduce new employees to organizational leaders soon after hire.
- 4. Take Advantage of Technology:** technology can be used from the recruitment stage right through the socialization process to document, monitor, communicate information, complete paperwork and engage in eLearning.

5. Give Newcomers a Sense of Purpose: new employees must feel that the organizational socialization activities they engage in are worthwhile and recognize the value of their role.
6. Provide Appropriate Training: orientation training must be designed to cater to the unique needs of a wide range of new employees; *studies warn against delaying orientation activities until a group of new employees is amassed.*
7. Provide Feedback Channels: the importance of two-way feedback is highlighted.

10 Synthesis of Findings

Table 6 presents a synthesis of main findings from the chapters included in the rapid review.

TABLE 6: Summary of Key Concepts

Models, Theories and Frameworks	Methods	Content Areas
Practices and Outcomes Model (Figure 1)	Orientation and training	Organizational goals and strategy
Socialization Resources Theory (Table 3)	Institutionalized tactics	Organizational language
Inform-Welcome-Guide Framework (Table 4)	Individualized tactics	Knowledge and skill base to build task proficiency
	Socialization agents	
	Feedback	
	Assignment of significant tasks	

There are three main theoretical frameworks presented in the literature that inform an orientation program for new employees. First, the practices and outcomes model in Figure 1 shows the direct connection between five key socialization practices and seven distal socialization outcomes, and also illustrates indirect effects through a set of seven proximal adjustment outcomes. This model is useful in that it gives a clear pathway for working toward the desired distal outcomes of the overall socialization process, while acknowledging that short term newcomer adjustment outcomes are achieved along the way. Socialization Resources

Theory (SRT) offers seventeen specific resources with associated timing that should be offered to new employees to facilitate their adjustment. The theory also provides a basis for future research. Finally, the Inform-Welcome-Guide framework offers three categories of organizational socialization activities that help new employees to become successful members of the organization.

There are six key methods highlighted in the literature that should be included in a successful organizational socialization program:

- orientation and training
- institutionalized socialization tactics
- individualized socialization tactics
- socialization agents
- interpersonal and job related feedback
- early assignment of significant work.

Orientation activities will introduce the new hire to organizational issues whereas training will emphasize required knowledge and skills. Appropriate socialization tactics will help achieve the organizational status quo or encourage individuality and autonomy, as desired. Experienced employees, as socialization agents, will support the transition of new employees into the organization. Feedback provided to new hires will help them to see their value to the organization and begin the integration process. Finally, early assignment of complex and significant work will help the employee to become familiar with the structures and routines of the work and their fellow employees. Together, these methods will contribute to the adjustment of the new employee in a coordinated, planned approach.

Finally, three key content areas that should be included in a successful orientation program are

- organizational goals and strategy
- organizational language
- knowledge and skills required for task proficiency.

Consideration of these theories and frameworks, methods and content areas in the development of a new employee orientation program will ensure a well planned, coordinated process.

11 Applicability and Transferability

This review is seen by internal stakeholders as very informative regarding the whole area of onboarding, organizational socialization and orientation. They are aware of the complex, long term nature of organizational socialization. Middle managers welcome the addition of centralized support particularly with respect to the concepts of the Public Health Way and the Core Competencies. Key messages will need to be layered throughout existing orientation documents and processes.

Adding layers of orientation is not without cost though. Attention must be given to targeting the orientation elements to employees who are expected to remain with the organization, rather than short term employees. Additional analysis is needed to understand the nature and course of employment of the temporary worker. Also, adding infrastructure and staff education costs, including orientation time, has to be balanced against overall service to the residents of Peel.

Commitment of the middle manager is seen as particularly important. They are the most responsible person for the employment experience of the individual and manage the process from recruitment through to performance appraisal. Their workload is already heavy and new elements must be constructed with minimal impact to the workload of the hiring supervisor. A core group of stakeholders will need to be engaged during the development and implementation

of the new elements. There is interest in this as certain supervisors already hold responsibility for orientation within their respective divisions.

Senior management will need to be engaged with the process, as the research points strongly to the importance of socialization opportunities with influential people in the organization. Follow up informal meetings between new employees and leaders should form a part of the plan.

Finally, orientation fits very well as a follow up to the Public Health Way sessions that took place during 2012. New materials produced as part of orientation could also be used to reinforce key messages with existing staff. In addition, there are several streams of work within the organization targeting core competency development, in particular, the public health sciences and assessment and analysis. It will be essential to ensure these initiatives are appropriately integrated.

12 Recommendations

The goal of any new employee organizational socialization or orientation process is the organizational socialization of the employee. In particular, for Peel Public Health practice, essential elements of organizational socialization include knowledge of the core competencies for public health and the principles of the Public Health Way. The practices that will contribute to this understanding of public health practice should include institutionalized socialization tactics, as well as selective use of individualized tactics. In the main, institutionalized tactics will enable new hires to have shared experiences, time allocated for group training and a common network of role models and leaders to guide their experiences and understanding of the organization. In an institution such as PPH, where common understanding of public health practice is important and practitioners must make a transition from clinician to public health practitioner, institutionalized tactics are most often the appropriate choice.

Practices should include elements reflected in both the Inform-Welcome-Guide framework and the Socialization Resources Theory. Further, practices should focus on content areas of goals and strategy, task proficiency and language. These elements bear great similarity to the concepts inherent in the Public Health Way and in the Core Competencies. They are highly important, difficult to master and will provide excellent material for training programs.

Finally, engaging all layers of management with the information gleaned from the rapid review will help to ensure consistency throughout the organizational socialization process. Supervisors must be particularly savvy as their feedback to new employees and choice of work assignments is very important for longer term positive outcomes.

In summary, the mnemonic STIR, created by the authors of this rapid review, highlights the key streams of an organizational socialization program reflecting these findings from the literature. These elements should be considered as new employees are integrated into the organizational mix:

SOCIALIZE:

- facilitate organizational socialization
- provide welcome activities
- build networks with other new employees
- provide opportunities to meet with and learn from organizational members, including senior leaders

TRAIN:

- build core competencies for public health to achieve task proficiency
- build job specific skills
- create significant task assignments

INFORM:

- highlight goals and strategies of PPH and the Public Health Way
- teach language unique to PPH and public health practice
- clarify expectations for successful job performance

- provide feedback

RESOURCE:

- provide easy access to tools and materials required for job performance
- encourage new employees to take initiative to access resources

References

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- (2) Klein, HJ & Polin, B. Are organizations on board with best practices onboarding? In: C. Wanberg. *The Oxford Handbook of Organizational Socialization*. New York: Oxford University Press Inc.; 2012. p. 267-287.
- (3) Van Maanen, JE & Schein, EH. *Toward a theory of organizational socialization*. Cambridge, Mass.: M.I.T. Alfred P. Sloan School of Management; 1977.
- (4) Jones, GR. Socialization tactics, self-efficacy, and newcomers' adjustments to organizations. *Academy of Management Journal*. 1986; 29(2): 262-279.
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- (6) Katz, R. *Time and work: Towards an integrative perspective*: Alfred P. Sloan School of Management, MIT; 1978.
- (7) Rollag, K, Parise, S & Cross, R. Getting new hires up to speed quickly. *MIT Sloan Management Review* 2012;6(2).
- (8) Klein, HJ & Heuser, AE. The learning of socialization content: A framework for researching orientating practices. *Research in Personnel and Human Resources Management* 2008; 27:279-336.

Appendices

Appendix A: Current Orientation Processes

Appendix B: Conceptual Model

Appendix C: Search Strategy

Appendix D: Literature Search Flowchart

Appendix E: Data Extraction Tables

Appendix A: Current Orientation Processes

ORIENTATION WITHIN MULTIPLE LAYERS OF THE ORGANIZATION				
ORGANIZATIONAL LEVEL	CONTENT	TOOLS/ACTIVITIES	WHEN	WHO is RESPONSIBLE
REGION OF PEEL	Corporate Overview (Includes Vision/Mission, Values) Our Culture Our Spirit Learning and Development Policies and Practices	Welcome Package	First Day of work or prior to first day	Supervisor
HEALTH SERVICES	Overview of Organizational Structure Departmental Overview	3.5 hour session held in Council Chambers - each employee receives a package with PowerPoint slides of presentation Pathways link to HS Orientation videos and slides	Two sessions held annually, one each in May and November	Strategic Policy, Planning and Initiatives
PUBLIC HEALTH	To Be Determined. <i>Possible Content:</i> ➤ <i>Strategic Plan</i> ➤ <i>Vision, Mission, Values</i> ➤ <i>Public Health Way</i> ➤ <i>Core Competencies for PH</i>	To Be Determined.	To Be Determined.	To Be Determined.

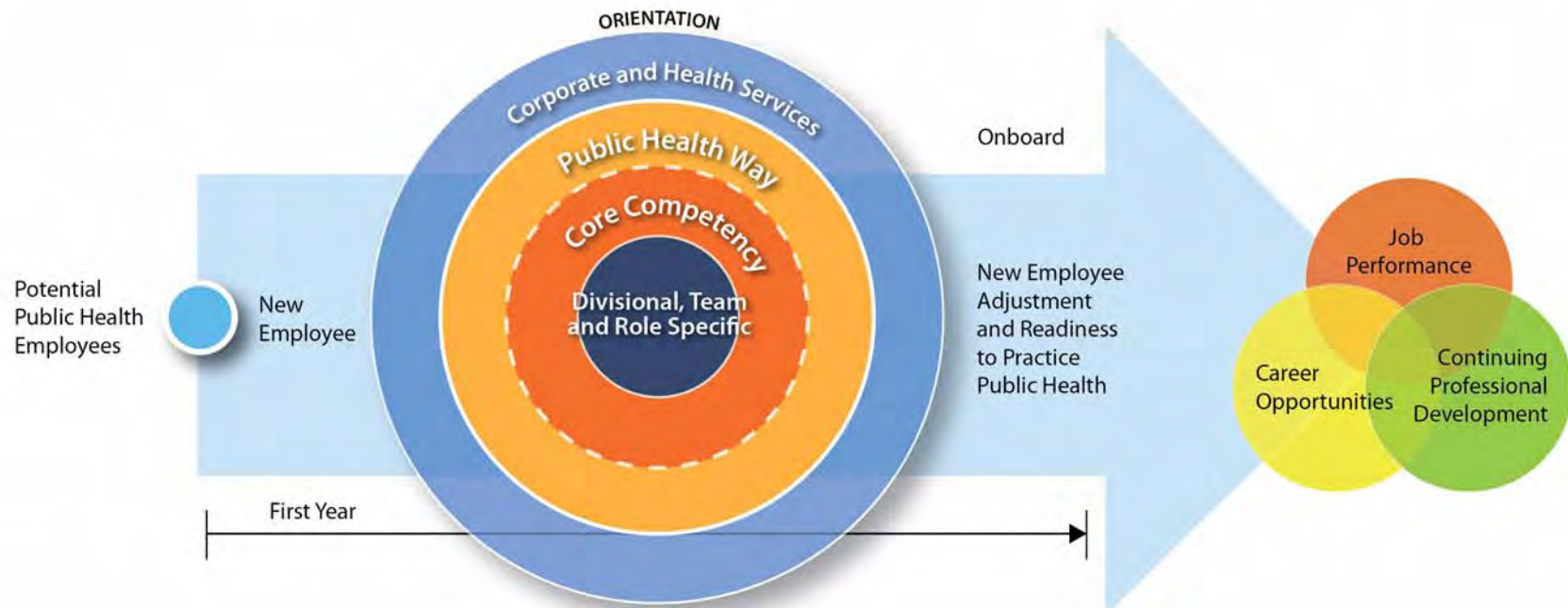
ORIENTATION WITHIN MULTIPLE LAYERS OF THE ORGANIZATION

ORGANIZATIONAL LEVEL	CONTENT	TOOLS/ACTIVITIES	WHEN	WHO is RESPONSIBLE
DIVISION	Strategic Priorities (Divisional, PH, Corporate)	PowerPoint, Electronic Information Management (EIM) (e.g. presentations, key documents), orientation package, binders	Variable	Director Manager Supervisor Preceptor Staff Orientation Committee (where it exists)
SECTION/PROGRAM	Programs & Services Strategic Priorities	Variable	Variable	Manager Supervisor Team Members
TEAM	Programs & Services Strategic Priorities (Sectional, Divisional, PH)	EIM 1:1 meetings Team Meetings	Immediate	Supervisor Preceptor/Buddy Team members
POSITION	PH Competencies (in relation to programs and priorities)	EIM 1:1 meetings	Immediate	Supervisor Preceptor/Buddy Team members
ROLE	Work Assignment e.g. specific tasks	1:1 Meetings Team Meetings	Immediate	Supervisor Preceptor/Buddy Team Members

Appendix B: Conceptual Model

Orientation to Public Health

← Recruitment → Orientation → Ongoing Employment and Talent Management



Appendix C: Search Strategy

MEDLINE:

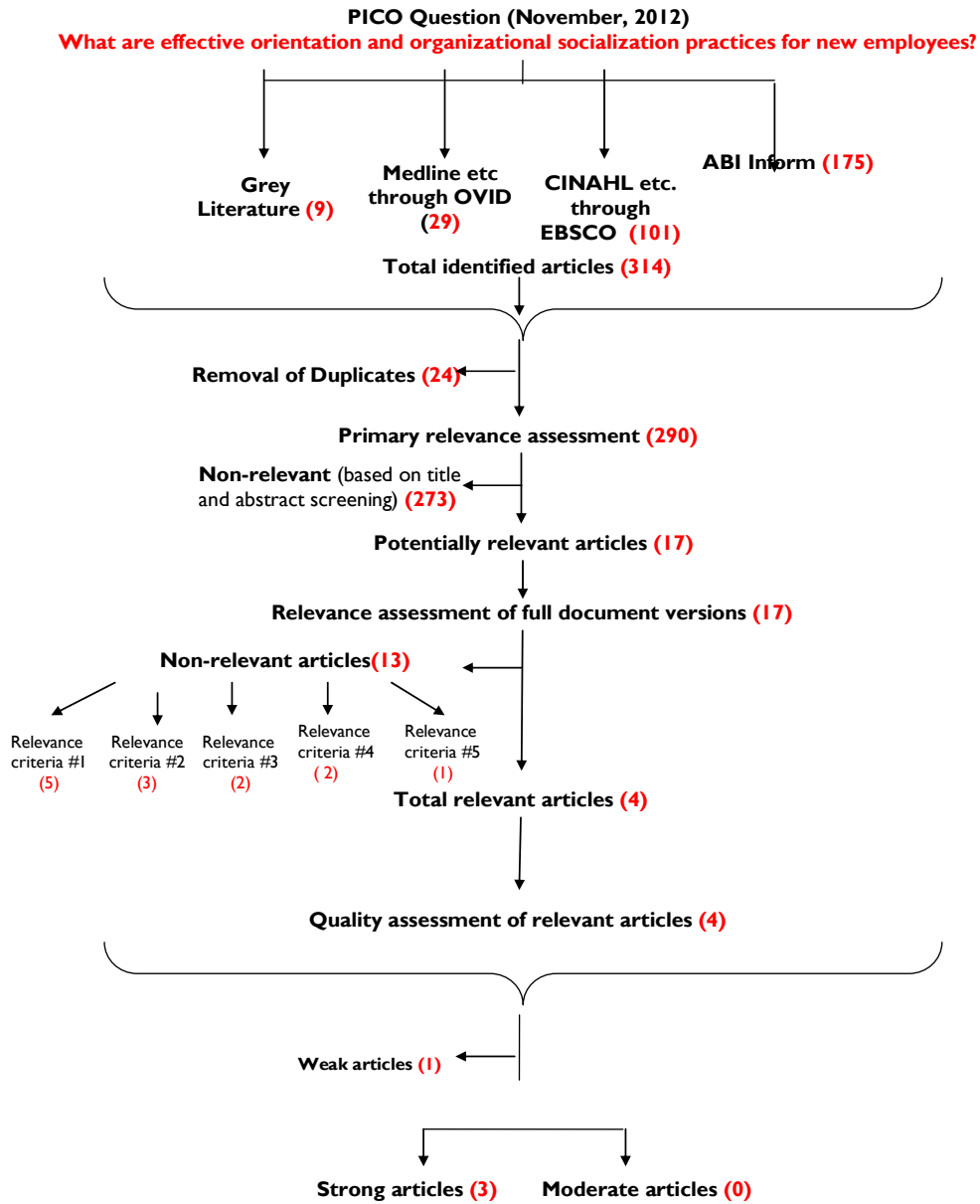
Database: EBM Reviews - Cochrane Database of Systematic Reviews <2005 to November 2012>, Ovid Healthstar <1966 to November 2012>, Ovid MEDLINE(R) <1946 to November Week 3 2012>, Ovid MEDLINE(R) In-Process & Other Non-Indexed Citations <November 29, 2012>, PsycINFO <1987 to November Week 4 2012>

Search Strategy:

-
- 1 meta-analysis.mp,pt. (140245)
 - 2 review.tw. (1551646)
 - 3 cochrane database of systematic reviews.jn. (26940)
 - 4 1 or 2 or 3 (1638572)
 - 5 exp guideline/ (39795)
 - 6 (practice guideline or guideline).pt. (49304)
 - 7 5 or 6 (49304)
 - 8 4 or 7 (1683226)
 - 9 (comment or letter or editorial or note or erratum or short survey or news or newspaper article or patient education handout or case report or historical article).pt. (2768782)
 - 10 8 not 9 (1641793)
 - 11 orientation\$.ti,ab. (189711)
 - 12 (organization* adj10 socialization).ti,ab. (625)
 - 13 newcomer*.ti,ab. (2703)
 - 14 (new adj (hire\$ or recruit\$ or employee\$)).ti,ab. (1733)
 - 15 onboard\$.ti,ab. (1592)
 - 16 Inservice Training/mt (3738)
 - 17 11 or 12 or 15 or 16 (195245)
 - 18 13 or 14 (4379)
 - 19 17 and 18 (495)
 - 20 10 and 19 (40)
 - 21 remove duplicates from 20 (29)

Set#	Searched for	Databases	Results
S1	<p>(((((ti("new employee") OR ti("new employees" OR "new hires")) OR ti("new hires" OR newcomer))) AND (yr(2000-2019) AND SCHOL(yes))) OR ((ab("new employee") OR ab("new employees" OR "new hires")) OR ab("new hires" OR newcomer))) AND (yr(2000-2019) AND SCHOL(yes)))) AND (yr(2000-2019) AND SCHOL(yes))) AND (((onboard* OR (organization* NEAR/10 socialization) OR (socialization process) OR SU.EXACT("Socialization")) AND (yr(2000-2019) AND SCHOL(yes))) OR ((SU.EXACT("Orientations") OR ti(orientation*) AND ab(orientation)) AND (yr(2000-2019) AND SCHOL(yes)))) AND (yr(2000-2019) AND SCHOL(yes))) AND (yr(2000-2019) AND SCHOL(yes))) AND (yr(2000-2019) AND SCHOL(yes))</p>	ABI/INFORM Global	175

Appendix D: Literature Search Flowchart



Source: Health-evidence.ca. Keeping Track of Search Results: A Flowchart. [Retrieved January 13, 2010]

Appendix E: Data Extraction Tables

General Information & Quality Rating for Book/Book Chapter	
1. Author(s) and Date	Saks, A. M. & Gruman, J. A. Getting newcomers on board: A review of socialization practices and introduction to socialization resources theory. In C. Wanberg (Vol. Ed.) The Oxford Handbook of Organizational Socialization. (Oxford Library of Psychology). 2012. Oxford University Press, Inc. New York, NY.
2. Country	Canada: Dr. Saks is a professor of organizational behaviour and human resources management affiliated with the Rotman School of Management, U of T; Dr. Gruman is an associate professor of organizational behaviour affiliated with the University of Guelph.
3. Quality Rating	<ul style="list-style-type: none"> Strong
4. Objectives of Book/Chapter	<ul style="list-style-type: none"> The Oxford Handbook of Organizational Socialization is the first edited volume of The Oxford Library of Psychology to consolidate comprehensive reviews of the academic literature on organizational socialization with socialization practices that are being carried out in organizations. Chapter 3 focuses on: <ol style="list-style-type: none"> The experience of organizational entry from the perspective of the new employee, and, what socialization programs should ideally achieve if they are to be effective. The 5 most widely examined organization-initiated interventions that have been reported in the literature: orientation programs, training programs, socialization tactics, job characteristics, and socialization agents. A review of the professional literature to identify gaps for research and practitioner literature review to glean what organizations are actually doing to bring new employees onboard. A new theory titled Socialization Resources Theory that revolves around 17 socialization resources that organizations may provide for new employees.
Details of Book Chapter	
5. Intended audience	<ul style="list-style-type: none"> Diverse audience, including graduate students, scholars, mentors, researchers and practitioners.
6. Objective reasoning	<ul style="list-style-type: none"> Conclusions are drawn from a review of the scholarly and practitioner literature; a theoretical framework is proposed.
7. Coverage (Types and scope of references used)	<ul style="list-style-type: none"> References are used extensively in the literature review, and to inform the theoretical framework that is proposed. References are also used to provide context and interpretation References include a range of journal articles (peer reviewed), ranging in date from 1966 to 2011.
Details of Topics Covered	
8. Description of topics	<ul style="list-style-type: none"> Needs of new employees was articulated as a useful organizing point of view Five most widely studied organization-initiated interventions are reviewed. Definitions: <ul style="list-style-type: none"> Orientation: different from socialization; orientation period is a formal part of the socialization process that focuses on organizational issues and is short; few members involved; it is narrower in scope; and it is an event or program – not a process. Training: a method of socialization that focuses on knowledge and skills necessary to perform specific work. Socialization Tactics: defined by Van Maanen and Schein (1979) as “people processing techniques,” six bipolar tactics refer to how organizations structure transition experiences for employees, both new employees and those within the organization (p. 35).

	<ul style="list-style-type: none"> • Job Characteristics: refer to skill variety, task identity, task significance, autonomy and job feedback. • Socialization Agents: refers to members of an organization who facilitate the socialization of new employees. <p>Socialization Resources Theory (SRT):</p> <ul style="list-style-type: none"> • Proposed by the authors to bridge the gap between socialization practice and research. Is described as “an approach to organizational socialization and onboarding that focuses on the resources newcomers require for successful adjustment to their jobs, roles, workgroup, and the organization” (p. 45). The underlying principle of SRT is that a new employee experiences stress as a result of the shift into a new job and having access to appropriate resources (17 dimensions) at different times in the socialization process will assist new employees to achieve optimal adjustment.
9. Intervention settings or contexts	<ul style="list-style-type: none"> • Studies reviewed took place in a wide variety of settings, including technology, hospital, educational, business, manufacturing and service industry based organizations.
10. Theoretical frameworks	<ul style="list-style-type: none"> • ROPES (Realistic Orientation Programs for New Employee Stress): provide realistic information, support and reassurance, use behaviour modeling/provide feedback, teach self-control and focus on specific stressors in order to reduce stress • Socialization Resources Theory: offers a framework to design and enhance onboarding/socialization programs
11. Target groups	<ul style="list-style-type: none"> • New employees and graduates of educational programs were studied.
Conclusions of Book Chapter	
12. Analytic Framework	<ul style="list-style-type: none"> • The proposed Socialization Resources Theory framework is based on key findings of the socialization literature and organizational practices.
13. Main conclusions	<ul style="list-style-type: none"> • Socialization outcomes are identified as resulting from orientation programs, training programs, socialization tactics, job characteristics and socialization agents. Outcomes include: job satisfaction, organizational commitment, intentions to quit, turnover, job performance, role orientation and stress. • New employees need: information; to have their anxiety reduced; to feel confident; to receive feedback and social support. • Orientation Programs: <ul style="list-style-type: none"> ○ Attendance at orientation programs is favourable versus not attending. ○ They are an integral part of the socialization process for new employees and play a role in an employee’s learning of content, reduction in levels of anxiety and stress, and enhancement of job satisfaction and organizational commitment. ○ Little is know about the effects of orientation programs on remaining indicators of new employee adjustment and other socialization outcomes identified. ○ Information is lacking regarding design and implementation, although previous research on ROPES gives some direction on design of programs that emphasize coping skills (emotion focused and problem-focused) • Training Programs: <ul style="list-style-type: none"> ○ New employees with low self-efficacy responded to formal training with reduced anxiety; training method made no difference to those with high self-efficacy. ○ The amount of training and whether it was seen to be helpful were related to several indicators, such as “job satisfaction, organizational commitment, intention to quit, ability to cope, and job performance.” ○ training programs can enhance self efficacy, decrease anxiety and improve job attitudes. • Socialization Tactics: <ul style="list-style-type: none"> ○ Socialization tactics have been widely studied and are attributed with influencing the majority of outcomes of socialization

	<p>and indicators of adjustment for new employees.</p> <ul style="list-style-type: none"> ○ Two meta-analyses concluded that socialization tactics at one end of the continuum referred to as “institutionalized” tactics promote structure and encourage new employees to accept organizational norms, whereas the tactics at the opposite end of the spectrum encourage new employees to stray from the norms and develop an individual approach to their role. ○ With respect to indicators of new employee adjustment and socialization outcomes “Institutionalized socialization tactics are negatively related to role ambiguity, role conflict and intentions to quit and positively related to fit perceptions, self-efficacy, social acceptance, job satisfaction, organizational commitment and job performance” (p. 36). ○ Institutionalized tactics yield a greater number of positive outcomes than do the individualized tactics. ○ A study by Saks (2007) concluded that the clear structure and formal nature of institutionalized tactics appear to be highly advantageous to new employees during their first six months of employment and especially to those who are recent graduates transitioning from school life to the workforce (p. 36). ● Job Characteristics: Studied elements include: skill variety, task identity, task significance, autonomy and feedback <ul style="list-style-type: none"> ○ Interpersonal feedback and task significance were deemed of most importance while granting excessive autonomy in the initial months of employment is considered detrimental to employee adjustment and socialization. ○ One study reported that a new employee will adapt more quickly if given an initial project requiring interaction with several others in the organization. ● Socialization Agents: refers to the individual members, or “insiders,” of an organization with whom new employees interact (often informally) as part of the socialization process to receive information and social support. Agents include supervisors, coworkers and senior coworkers. <ul style="list-style-type: none"> ○ Socialization agents give new employees information and social support that contribute to reduced stress for the new employee and encourage the new employee to develop positive job attitudes. ● Summary of Socialization Practices in Organizations: <ul style="list-style-type: none"> ○ Tend to use institutionalized socialization tactics ○ Organizations report more detail about elements of orientation and training programs than what is found in the research literature ○ Organizations use many activities that have neither been studied nor reported in the literature. ○ Organizations appear to implement various activities in a very definite sequence ○ Organizations view socialization as an ongoing process ● Socialization Resources Theory: <ul style="list-style-type: none"> ○ Identifies 17 socialization resources dimensions and a specific time frame during the socialization process when each resource should be introduced: anticipatory socialization (prior to entry); formal orientation, proactive encouragement, formal assistance (immediately after entry); social events, socialization agents, supervisor support and relationship development (following orientation – social capital resources); job resources, personal planning, training, assignments, information, feedback and, recognition and appreciation (following orientation – work-related resources); follow-up and program evaluation (following formal socialization/onboarding). ○ offers a framework for the creation, monitoring and appraisal of socialization programs
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	<ul style="list-style-type: none"> ○ emphasizes resources required to aid new employee adjustment rather than focusing solely on socialization practices ○ provides a more exhaustive list of socialization resources than reported in the literature, including those presented in the literature ○ stipulates when in the socialization process the resource should be used ○ notes disparity with respect to how each resource is related to employee adjustment indicators and socialization outcomes, necessitating further research
14. Component(s) of research question addressed	<ul style="list-style-type: none"> ● Addresses the component of the research question that refers to practices/methods.
15. Limitations	<p>Major limitations reported by authors:</p> <ul style="list-style-type: none"> ● There have not been any great advances in the organizational socialization literature in the last 25 years; aside from some work on the socialization tactics, study of socialization practices remains incomplete. ● Socialization tactics emphasize the structure of the process rather than shed light on the content, activities or programs/events. ● Not much is known about what socialization tactics organizations actually use or ought to use ● There is no broad framework that delineates specific behavioural activities of socialization agents and aligns them with particular socialization outcomes. ● Knowledge regarding orientation and training programs is limited to an understanding that more is favourable.
16. Comments	<ul style="list-style-type: none"> ● Provides a theoretical framework that considers temporality; focuses on providing that which new hires need and provides the resources for socialization. ● Reference list includes 96 citations with 37/96 from 2003 or newer
General Information & Quality Rating for Book/Book Chapter	
1. Author(s) and Date	Klein, H. J. & Polin, B. Are organizations on board with best practices onboarding? In C. Wanberg (Vol. Ed.) The Oxford Handbook of Organizational Socialization. (Oxford Library of Psychology). 2012. Oxford University Press, Inc. New York, NY.
2. Country	United States; Dr. Klein is a professor at Ohio State University, Department of Management Resources. Polin is a doctorate student at Ohio State University.
3. Quality Rating	<ul style="list-style-type: none"> ● Strong
4. Objectives of Book/Chapter	<ul style="list-style-type: none"> ● The Oxford Handbook of Organizational Socialization is the first edited volume of The Oxford Library of Psychology to consolidate comprehensive reviews of the academic literature on organizational socialization with socialization practices that are being carried out in organizations. ● Chapter 14 focuses on: <ol style="list-style-type: none"> 1. Summarizes the academic and practitioner literature related to onboarding; identifies general recommendations in the practitioner literature related to onboarding best practices. 2. Disseminates results of a survey that was designed to profile most recent onboarding practices. 3. Identifies areas for future research regarding onboarding process to increase understanding about the process and give direction to practitioners about optimal design of onboarding programs 4. Compares findings of academic literature, practitioner literature and survey results.
Details of Book Chapter	
5. Intended audience	<ul style="list-style-type: none"> ● Diverse audience, including graduate students, scholars, mentors, researchers and practitioners.

6. Objective reasoning	<ul style="list-style-type: none"> • Conclusions are drawn from a review of the scholarly and practitioner literature. • Conclusions are empirically-based
7. Coverage (Types and scope of references used)	<ul style="list-style-type: none"> • References used extensively in the literature review, from both academic and practitioner literature. • References also used to provide context and interpretation. • References included a range of journal articles (peer reviewed), ranging in date from 1976 to 2011.
Details of Interventions	
8. Description of Topics	<ul style="list-style-type: none"> • Onboarding is defined as: “all formal and informal practices, programs, and policies enacted or engaged in by an organization or its agents to facilitate newcomer adjustment.” • Socialization “is a process that occurs within a person, whereas onboarding is the set of practices, policies, and procedures formal or informal, put in place by managers and HR departments to help structure newcomers’ early experiences and thus facilitate the socialization of new employees.” • Onboarding has a defined time frame whereas socialization is a continuous process that occurs throughout one’s career in an organization. • Orientation is regarded as a particular kind of onboarding program, usually formal in nature and with a defined time frame, varying from hours to days in length. • Socialization tactics refer to the approaches used to socialize new employees into an organization.
9. Intervention settings or contexts	<ul style="list-style-type: none"> • Little description is provided regarding the settings on which the academic and practitioner literature is based. The survey participants were Human Resources professionals from organizations varying both in size and type of industry.
10. Theoretical frameworks	<ul style="list-style-type: none"> • None
11. Target groups	<ul style="list-style-type: none"> • New employees and graduates of educational programs were studied.
Conclusions of Book Chapter	
12. Analytic Framework	<ul style="list-style-type: none"> • Inform-Welcome-Guide Framework (Klein and Heuser, 2008) is used to organize findings from the academic literature on socialization.
13. Main Conclusions	<p>Key Findings from Academic Literature Review:</p> <p>Onboarding:</p> <ul style="list-style-type: none"> ○ Although minimal research exists regarding specific onboarding practices, three categories of onboarding activities have been identified in the academic literature: Inform Welcome and Guide. ○ INFORM category is further broken down into three areas: Communication, Resources and Training. ○ Communication: refers to deliberate intent to foster both one-way and two-way communication with new employees <ul style="list-style-type: none"> ▪ Based on a meta-analysis, providing information to new employees about their new job can be done using Realistic Job Previews, which are believed to be successful in reducing turnover and improving job attitudes when shared verbally during the later stages of the recruitment process but prior to hiring. When considering job performance, providing the Realistic Job Preview post-hiring and in video format proved to be best. ▪ A range of socialization agents (who provide information and feedback to new employees) should be part of onboarding activities. ○ Resources: refers to giving new employees access to necessary materials or help - to which they must initiate access <ul style="list-style-type: none"> ▪ The concept of proactivity – the extent to which the new hire will take the initiative to seek out resources – is

important; proactivity research cautions that “ any effort by organizations to make resources available to newcomers must ensure those resources are viewed as helpful, credible, and easy to access with minimal social cost or chance of negative evaluation. “ p 272

- Onboarding programs should foster a learning climate to encourage new employees to access resources
- Training: refers to practices that focus on imparting knowledge and skills to new employees
 - Orientation programs are considered a formal type of training; although orientation programs are widely used by organizations, minimal research has been conducted to examine the best “content, structure, medium or timing”
- WELCOME category refers to the “practices, programs, and policies aimed at acknowledging and celebrating a newcomer’s arrival
 - Welcome activities are believed to be vital to the new employee’s development of both social and work relationships with different members of the organization, which allows the employee to access different people depending on the type of information being sought.
- GUIDE: refers to the practice of assigning a designated colleague to support the new employee through transition
 - Despite little research on the use of a personal guide or buddy, research conducted on socialization agents and social support suggests this practice could be effective.
 - Inconsistencies probably exist in the effect that the use of guides has on new employees due to variation in who acts as a guide (role, power relationship), the nature of the relationship (mentor, coworker “buddy”) and implementation.
 - In general, research suggests a favourable relationship between mentorship and socialization outcomes (p 274)
- Temporality: the current body of literature does not provide insight into the best time to offer various onboarding activities or the optimal length of programs
- A variety of onboarding practices is recommended to adequately address the range of needs of new employees, although specific onboarding practices have not been studied.

Key findings from Practitioner literature review: (Chapter authors summarize the key messages gleaned from three types of practitioner literature, including white papers, practitioner periodicals and advice columns.

- An abundance of practitioner literature points to a need for and favourable outcomes of onboarding programs
- In their review of the practitioner literature, the authors found considerable agreement and commonalities with respect to what onboarding activities/programs organizations recommend and implement.
- SEVEN general findings were reported:
 1. Onboarding is a Process: different activities should be scheduled at various times throughout the process
 2. Onboarding Should Reinforce Culture: an organization’s onboarding program should align with the cultural image of the organization that was portrayed to the employee during recruitment and with what the employee is actually exposed to once working in the organization.
 3. Onboarding is a team effort: use of socialization agents is integral to the socialization process. New employees should be introduced to organizational leaders early in the process and direct supervisors have a key role
 4. Take Advantage of Technology: technology can be used from the recruitment stage right through the socialization process to document, monitor (checklists), communicate information, complete paperwork, engage in eLearning, use social networking technology.

	<ol style="list-style-type: none"> 5. Give Newcomers a Sense of Purpose: New employees must be made to feel that the onboarding activities they engage in are worthwhile and also recognize the value of their role in the organization. 6. Provide Appropriate Orientation Training: Orientation training must be designed to cater to the unique needs of a wide range of new employees; criticism is given to delaying orientation activities until a group of new employees is amassed as this requires some to figure things out without the clarity and structure of a formal orientation. 7. Provide Feedback Channels: the importance of two-way feedback is highlighted. <p>Generally, the practitioner literature tends to focus on the outcomes of onboarding programs rather than outline specific activities, policies and programs that organizations can implement to socialize new employees.</p> <p>“The evidence in both the academic and practitioner literatures is that although best practice onboarding activities require upfront and ongoing costs, the costs of no or poor onboarding program is far greater.” (p. 279)</p> <ul style="list-style-type: none"> ○ Current State of Onboarding Practices – The Survey <ul style="list-style-type: none"> ▪ A survey was undertaken to gain an understanding of what is actually occurring in organizations ▪ Response from 482 HR professionals, variety of organizations in terms of size and industry ▪ One element of the survey asked to rate importance and difficulty of 12 dimensions of organizational socialization ▪ Concludes that attention should be given to most important and most difficult <ol style="list-style-type: none"> 1. Task proficiency: the job knowledge and skills needed to successfully perform ‘in role’ tasks 2. Language: the unique technical knowledge, acronyms, slang, and jargon used in the organization 3. Goals and Strategy: the mission, goals and strategy of the organization
14. Component(s) of research question addressed	<ul style="list-style-type: none"> • Addresses the component of the research question that refers to practices/methods.
16. Limitations	<ul style="list-style-type: none"> • The authors report an enormous lack of information available regarding onboarding practices that are used in organizations and their effectiveness • The literature does not provide sufficient information about the best timing of onboarding activities in terms of when it will be most relevant to new employees • The practitioner literature reports that most onboarding activities occur in the first few days after a new employee joins an organization while, in contradiction, both academic and practitioner literature state that socialization can take up to two years. • The practitioner literature is unclear as to what practices lead to which outcomes • The practices reported in the practitioner literature are often very vaguely described or are so specific to a particular setting that they may not be transferable to other organizations. • Despite the wide use of orientation programs in practice, very few studies examine them
17. Comments	<ul style="list-style-type: none"> • The review did not provide clear summaries of the research literature with respect to each topic area, making synthesis difficult. • The authors did not provide descriptions of the populations studied in the studies that were reviewed.

Appendix F: Applicability & Transferability Worksheet

Starting a New Program

Factors	Questions	Notes
Applicability (feasibility)		
Political acceptability or leverage	<ul style="list-style-type: none"> • Will the intervention be allowed or supported in current political climate? • What will the public relations impact be for local government? • Will this program enhance the stature of the organization? <ul style="list-style-type: none"> ◦ <i>For example, are there reasons to do the program that relate to increasing the profile and/or create a positive image of public health?</i> • Will the public and target groups accept and support the intervention in its current format? 	<ul style="list-style-type: none"> • Workforce development is a strategic priority, as is building understanding of the Public Health Way in all employees • Will be important to manage costs associated with orientation • Supervisors and Managers are primarily responsible for overall orientation of the new employee, so increased work could be an issue • They already manage large parts of the orientation and see added elements to be developed centrally as a good thing
Social acceptability	<ul style="list-style-type: none"> • Will the target population find the intervention socially acceptable? Is it ethical? <ul style="list-style-type: none"> ◦ <i>Consider how the program would be perceived by the population.</i> ◦ <i>Consider the language and tone of the key messages.</i> ◦ <i>Consider any assumptions you might have made about the population. Are they supported by the literature?</i> ◦ <i>Consider the impact of your program and key messages on non-target groups.</i> 	<ul style="list-style-type: none"> • For new employees this will be seen as very helpful and welcoming • New employee at the table validated information in the review especially in terms of meaningful work assignment early on • There is a great deal of change currently in the organization and there is limited capacity for absorbing more new processes • Will need to stage KT to middle management

<p>Available essential resources (personnel and financial)</p>	<ul style="list-style-type: none"> • Who/what is available/essential for the local implementation? • Are they adequately trained? If not, is training available and affordable? • What is needed to tailor the intervention locally? • What are the full costs? <ul style="list-style-type: none"> ◦ <i>Consider: in-kind staffing, supplies, systems, space requirements for staff, training, and technology/administrative supports.</i> • Are the incremental health benefits worth the costs of the intervention? <ul style="list-style-type: none"> ◦ <i>Consider any available cost-benefit analyses that could help gauge the health benefits of the intervention.</i> ◦ <i>Consider the cost of the program relative to the number of people that benefit/receive the intervention.</i> 	<ul style="list-style-type: none"> • Resources will need to be spent on building training modules • Most likely available within current budgets • Could be reduction in staff turnover with better onboarding processes • Group agrees that there is an optimal mix of centralized support for onboarding as well as decentralized (within division) work already being done • Centralized support is seen as very helpful • Need to discern cost benefit of spending onboarding time on temporary employees • Will need to further assess what happens to the temporary worker • Culture of PPH is conducive to bringing new employees into an atmosphere of learning
<p>Organizational expertise and capacity</p>	<ul style="list-style-type: none"> • Is the intervention to be offered in line with Peel Public Health's 10-Year Strategic Plan (i.e., 2009-2019, 'Staying Ahead of the Curve')? • Does the intervention conform to existing legislation or regulations (either local or provincial)? • Does the intervention overlap with existing programs or is it symbiotic (i.e., both internally and externally)? • Does the intervention lend itself to cross-departmental/divisional collaboration? • Any organizational barriers/structural issues or approval processes to be addressed? • Is the organization motivated (learning organization)? <ul style="list-style-type: none"> ◦ <i>Consider organizational capacity/readiness and internal supports for staff learning.</i> 	<ul style="list-style-type: none"> • Many elements of orientation process are already in place • Good opportunity to build consistency and repetition of messages throughout layers • Learning modules being developed for many aspects of Public Health core competencies • Opportunity to use this plus build some specific resources re Peel Public Health

Transferability (generalizability)		
Magnitude of health issue in local setting	<ul style="list-style-type: none"> • What is the baseline prevalence of the health issue locally? • What is the difference in prevalence of the health issue (risk status) between study and local settings? <ul style="list-style-type: none"> ○ <i>Consider the Comprehensive Health Status Report, and related epidemiological reports.</i> 	N/A
Magnitude of the “reach” and cost effectiveness of the intervention above	<ul style="list-style-type: none"> • Will the intervention appropriately reach the priority population(s)? <ul style="list-style-type: none"> ○ What will be the coverage of the priority population(s)? 	N/A
Target population characteristics	<ul style="list-style-type: none"> • Are they comparable to the study population? • Will any difference in characteristics (e.g., ethnicity, socio-demographic variables, number of persons affected) impact intervention effectiveness locally? <ul style="list-style-type: none"> ○ <i>Consider if there are any important differences between the studies and the population in Peel (i.e., consider demographic, behavioural and other contextual factors).</i> 	N/A
<p>Proposed Direction (after considering the above factors): Integrate new elements with current divisional and departmental processes Reinforce important role of supervisor and manager Continue to reinforce learning organization elements</p>		

Form Completed by: Bev Bryant

Worksheet adapted from: Buffet C., Ciliska D., and Thomas H. National Collaborating Centre for Methods and Tools. November 2007. *Can I Use this Evidence in my Program Decision? - Assessing Applicability and Transferability of Evidence.*