



WORKFORCE CONVERSATION GUIDE: AN ONBOARDING SELF-ASSESSMENT

Many agencies spend significant time and resources recruiting and selecting new employees, but without strong onboarding, those efforts can fall short. If new employees don't feel welcomed, lack clarity about their roles, or struggle to understand how the agency works, they may have trouble adjusting and performing well. In contrast, new employees who are effectively onboarded tend to experience greater job satisfaction, perform better, and are less likely to leave their organization (see summary of research on [Organizational Socialization](#) for more information). Prioritizing onboarding is essential to providing new employees with the experience and support they need to succeed.

WHAT IS ONBOARDING?

Onboarding is the process of helping new employees become fully integrated into an organization. It can include formal programs shared by all new hires, as well as informal support, such as mentoring from more experienced colleagues. When onboarding is done well, it leads to smoother workplace adjustment—helping new employees build social connections, gain the skills and knowledge needed for their role, understand job expectations, and feel a strong sense of belonging within the organization ([Bauer et al., 2024](#)).

WHO SHOULD BE INVOLVED IN THE ASSESSMENT?

This review should be conducted by a [workforce team](#) to ensure different perspectives are at the table. To assess onboarding, you will want to have people with the following skills/roles:

- human resources managers
- child welfare agency leaders
- child welfare managers/supervisors
- new and experienced child welfare caseworkers/social workers
- IT support
- office managers/administrative support
- onboarding coordinators
- training staff



USING THE WORKFORCE CONVERSATION GUIDE

Workforce challenges are common, but it can be difficult to pinpoint which aspects of the employee lifecycle provide the greatest opportunity for improvement.

This resource is designed as a starting point to dive into your data and understand where you can strengthen your workforce. These workforce conversation guides address topics related to recruitment, performance, and well-being. Each one provides a list of questions intended to prompt your workforce team to consider what they know, what information is missing, identify possible trends, and question what the data mean.

These resources are designed to help you assess your needs. It is recommended that you work through each one, as workforce challenges are interconnected (see [Key Takeaways from Phases of the Child Welfare Employee Lifecycle](#)). For example, your retention problem may be directly linked to your recruitment sources. We encourage you to pull together a team, meet regularly to work through the questions, and ask yourselves “why” you are doing something in a particular way. The amount of time this process takes varies, but at the end of it, you should be able to identify where to invest your time and resources.

It is beneficial to have employees with various levels of tenure in the room and someone who has recently experienced the onboarding process. External workforce experts may also provide a fresh perspective and greater knowledge of the research on onboarding to prompt additional questions.

WHAT SHOULD WE LOOK AT?

Information will be gathered from the following sources:

- Records or reports of any onboarding materials used across the agency, such as onboarding checklists, welcome packets, orientation agendas, and policy manuals.
- Documentation of activities, including completion of paperwork, distribution of employee technology, ID badges, office supplies, trainings, and workplace tours.
- Details about onboarding timelines and the key individuals involved in the process.
- Input collected from new hires through interviews, focus groups, or surveys to assess how well they have adjusted, how welcomed they feel by coworkers, and what improvements they suggest for a more successful onboarding experience.
- Input from managers or peers on new employees' performance and team integration, and how involved they feel they have been at onboarding new employees.
- Information gathered during exit interviews or surveys about whether onboarding experiences contributed to disengagement or turnover among departing employees.

Agencies should be thoughtful and intentional about how and where this information is stored so that only the necessary individuals have access to it. It is also best to use aggregate, deidentified data.

WHAT QUESTIONS SHOULD WE EXPLORE?

Strategies and activities currently in place:



- What are people's perceptions regarding onboarding? What do they feel works well, and what do they think could be improved to best support new employees?
- What strategies are used to welcome, orient, and onboard new employees?

o Do the strategies cover all the steps, forms, notices, etc. to comply with new employee requirements? If not, what is missing or unclear? What challenges are preventing full coverage, and how can they be addressed?

o Do the strategies provide clarity about important expectations and answer common questions? If not, what important expectations or common questions are not currently addressed? How could communication methods be improved to provide better clarity?

o Do the strategies help new employees begin to build meaningful connections with others, including experienced workers? If not, how can you help build connections? How are these connections maintained beyond the initial onboarding period?

o Do the strategies help new employees begin to understand the agency's culture (e.g., values, norms, beliefs)? If not, what aspects of the agency's culture are not clearly communicated? How could onboarding be adjusted to better introduce and embed the agency's values and norms?

- What strategies are used to welcome, orient, and onboard new employees?
 - Discuss whether new employees are receiving the right type and amount of information and resources at the right times. Does the process continue to support new employees through different phases and transitions as they integrate into the agency?

Information shared:

- What materials and resources are included in the onboarding process? Are they comprehensive, up to date, clear, professional, and welcoming for a new employee? If not, what updates or additions would improve their quality and better support new employees?
 - Are the onboarding materials easily accessible by everyone who needs them?
 - Are the activities and materials sufficiently standardized to ensure a reliable approach across people, place, and time? If no, what steps can be taken to better standardize activities and materials while still allowing for necessary flexibility?

Who is involved:

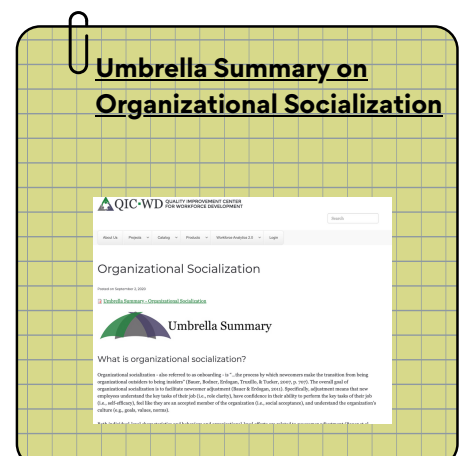
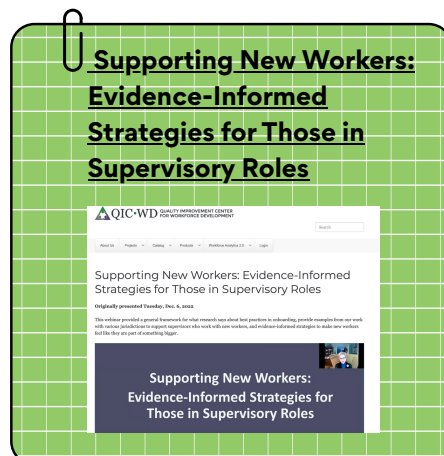
- Who participates in the onboarding process? Are all the right people involved? Consider the potential roles of human resources, IT support, supervisors, managers, leaders, coworkers, office managers, and others. Who is responsible for each part of the onboarding process?

Documenting and tracking participation:

- Is there a clear and easy process for recording and tracking what activities have been completed for each new employee? If yes, can everyone who needs completion records access them? If not, what barriers are preventing activities from being recorded and tracked? What tools, systems, or practices could be introduced to create a clearer and more consistent tracking process for onboarding activities?

WHAT ADDITIONAL RESOURCES ARE AVAILABLE?

Digging deep into your data is not a simple task. These guiding questions will likely lead to more questions or prompt team members to want to learn more about onboarding. Below are a few curated resources to support your team. (Please note that no team member is expected to be an expert in these workforce topics and that bringing in an external consultant to help work through this process can be a significant benefit to any workforce team.)



WHAT ARE THE NEXT STEPS?

Congratulations on examining how onboarding impacts your workforce. This is just one step in the process of your workforce self-assessment. After you work through the questions above, you may identify a few areas of onboarding that need further exploration. For example, your team may realize that new staff are struggling to integrate into their work teams. Review the questions and information gathered during the process to ensure clarity, interpret the findings, and identify any additional questions or analyses that may help. Once you have clarity around the issue that needs to be addressed you can dig deeper into a specific aspect of the onboarding process to develop targeted solutions. The results of the team's assessment may be shared with a management team to get their reactions and interpretations to your findings. Management may also need to identify available resources (e.g., time, money, and people) before your team can move on to select (or create) a workforce intervention or analytics tool to address the challenge.

The needs and expectations of the workforce change, and your organization must be responsive to those changes. This exercise should be repeated every few years, especially if employee recruitment or retention issues arise and employee surveys indicate challenges with the onboarding process. We recommend that you review your training strategies as a next step.

REFERENCES

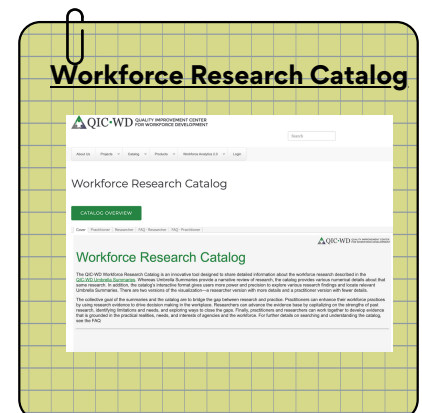
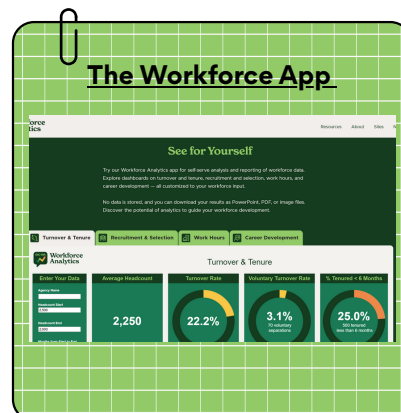
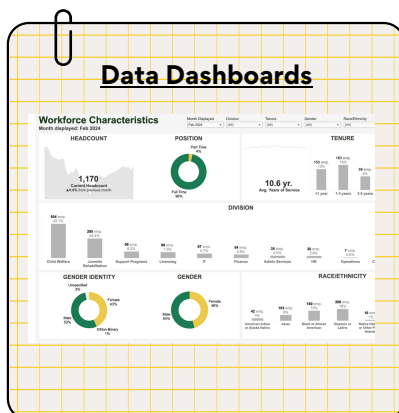
Bauer, T. N., Erdogan, B., Ellis, A. M., Truxillo, D. M., Brady, G. M., & Bodner, T. (2024). New Horizons for Newcomer Organizational Socialization: A Review, Meta-Analysis, and Future Research Directions. *Journal of Management*, 51(1), 344-382. <https://doi.org/10.1177/01492063241277168> (Original work published 2025)

RESOURCES

Data visualization tools, such as dashboards ([example here](#)), can help workforce teams identify trends and monitor

The Workforce App (embedded under the “See for Yourself” header) to input basic workforce data and see visualizations related to Turnover & Tenure, Recruitment & Selection, Work Hours, and Career Development

Use the Practitioner View of the Workforce Research Catalog to learn more about the association between common workforce outcomes (e.g., burnout, stress, turnover) and the variables that predict them.



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