**Orientation Plan – Tool #14**

A new EO orientation introduces the new EO to the BON/agency and his or her new role. Beyond providing information about the BON/agency’s policies and procedures, an effective orientation makes the new EO comfortable and promotes the BON/Agency’s culture and values. Developing and facilitating a new EO orientation takes time. Taking the time to properly orient new EOs increases their chances of being successful. This may increase the EO’s retention, saving the BON/agency time and money in recruitment in the long run.

A good orientation will enable a new EO to be successful in their new position by:

* Sharing relevant BON/agency information and beginning a process of learning about the BON/Agency’s mission;
* Understanding the culture of the BON/agency, including the values, behaviors, formal and informal practices; and
* Building relationships with staff, colleagues and other stakeholders.

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| Prior to the Start Date There are many elements of an orientation that should be prepared in advance of a new EO starting work:   * Advise appropriate individuals of the new EO’s name and start date. * Arrange for and equip a workspace with the necessary furniture, working equipment and supplies. * Set up email address, phone number, and prepare business cards, office keys, etc. * Add the EO to organizational chart and appropriate internal lists such as telephone, email, website directory. * Prepare documents for the new EO such as copy of job description, relevant reports and BON/agency documents. * Ensure the BON/agency orientation manual is up-to-date. * Contact the new EO to confirm where and when to report and where to park on the first day. * Plan the orientation process including what will happen on the first day, week and month. * Determine the roles of those involved in the orientation process. |

**Orientation Checklist**

**Introductions:**

* Introduce to staff, colleagues, a mentor, legal counsel, etc.
* Tour the BON/agency
* Discuss orientation process

**Organizational Overview:**

* Provide BON/agency overview
* Review organizational chart
* Contact NCSBN with new EO information and to establish mentor

**Job Duties and Responsibilities**:

* Review new EO’s job description and responsibilities
* Review statutes, rules, regulations and policies
* Provide and review relevant reports and information
* Discuss priorities including:
  + Legislation
  + Governance structure
  + Board member relations
  + Licensing
  + Education
  + Enforcement/discipline
  + Practice
* Meet external stakeholders
* Establish feedback plan

**Human Resources and Administration:**

* Complete necessary paperwork for pay and benefits
* Review employee policies and procedures manual
* Review travel and reimbursement processes
* Explain absences, leave and vacation policies
* Discuss telephone and email protocol, and internet use policy
* Review health, fire and safety procedures
* Review the performance management system
* Explain the internal communication processes including staff meetings
* Orient to technological infrastructure (e.g. licensing system, enforcement system, etc.)