

Onboarding, onboard-keeping and offboarding: current practice and relevance for Swiss IC actors

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Authors

Anne Richmond
Sandra Rothboeck, cinfo
Veronika Henschel, cinfo

Editor

Louise Rapaud

Layout

Anita Langenegger, cinfo

Photos

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www.cinfo.ch



Centre for Information,
Counselling and Training for
Profession relating to
International Cooperation

Rue Centrale 115
2503 Bienne, Switzerland
+41 32 365 80 02
info@cinfo.ch | www.cinfo.ch



Welcome to cinfo. As a part of cinfo's new strategic direction to expand our quantitative and qualitative research on trends in the labour market and careers in international cooperation, we would like to present you this study, "Onboarding, onboard-keeping and offboarding: current practice and relevance for Swiss IC actors". A challenge currently facing cinfo member organisations is the shortage of experienced Swiss experts and middle managers who are willing and able to work abroad, particularly as such work is often under limited contracts and increasingly fragile. At the same time, the greater availability, flexibility and capacity of national and non-Swiss talent offers organisations the potential for sourcing from a broader labour pool. With a growing international workforce, new questions arise about how organisations can ensure that their employees effectively represent the values and culture of the organisation. Actors in international cooperation increasingly acknowledge the need for well-developed onboarding, onboarding-keeping and offboarding processes, and literature and good practices are gradually being cited from the private sector. How do Swiss organisations engage with their employees to ensure that they feel ownership for, and live and promote the values of the organisation when they join, remain or leave? The survey was a collaboration between cinfo and 17 member organisations as well as the Swiss government. To our knowledge, there have been no comparable initiatives, making this a highly pertinent and fascinating study. We are pleased to provide the stimulus for a debate and strategic decision-making on how the Swiss NGO network, the government and cinfo can jointly use these findings for further collaboration.

I wish you a good read.

Lisa Isler
Director

«Train people well
enough so they can
leave, treat them
well enough so they
don't want to.»

Richard Branson, Entrepreneur

Executive summary

With this research cinfo set out to explore how Swiss organisations active in international cooperation (IC) could learn from international practice and each other when it comes to managing staff and introducing or reinforcing organisational values and principles. The paper highlights three stages in achieving alignment of an employee with organisational values: onboarding (the process of integration within an organisation's culture and activities); onboard-keeping (the ways that organisations and employees maintain and deepen their alignment and connection); and offboarding (the end of an employment relationship, though potentially a continuing association). These three stages form an employment life cycle and define the period of engagement of an employee with the organisation.

A literature review and collection of case studies resulted in a matrix with 60 practices that are relevant to organisations in international cooperation. These were categorised into two groups: stages (onboarding, onboard-keeping and offboarding) and a typology of practice (compliance, clarification, connection or culture). These two aspects formed a matrix of practice against which each organisation's own practices were self assessed and scored.

For all three stages, practices include basic or primarily administrative practices, such as record keeping, tracking turnover, and meeting statutory requirements for employment. Beyond these, organisations vary in their focus and capacity for more complex practices (active or advanced levels). There

is no 'one shoe fits all' solution, although practices are similar at the basic level. While larger organisations may have more formal, defined processes (such as a standardised induction programme), smaller organisations are able to achieve a high degree of staff involvement in policy development because their size allows them to act according to the value of internal democracy.

Most organisations, but especially larger ones with a significant number of field staff, highlighted differences in HR practices applied to HQ/Swiss/expatriate staff compared with those hired locally outside Switzerland. Another observation is that, for most organisations, scores were highest for the practices used during onboarding. Offboarding scored lowest for most organisations.

A wide range of good practices were found in all three stages. A number of areas for collaboration or further development, facilitated by cinfo, are discussed at the end of the paper and it is expected that more will emerge over the course of later discussions.

I. Introduction

cinfo, the Center for Information, Counselling and Training for Professions relating to International Cooperation, provides a range of human resource development services to its member organisations to support Swiss international development and humanitarian work. A current challenge facing the entire sector of international cooperation (IC) is the shortage of experienced Swiss experts and middle managers who are willing and able to work abroad, particularly as such work is often under limited contracts and in increasingly fragile contexts. At the same time, the greater availability, flexibility and capacity of national and non-Swiss international talent offers organisations the potential for sourcing from a broader labour pool. With a growing international workforce, new questions arise about how organisations can ensure that their employees effectively represent the values and culture of the organisation.

Onboarding (or integration), onboard-keeping (or engagement) and offboarding (exit) are important strategies for ensuring that employees understand and embody an organisation's values, professional and ethical standards, ways of working and the overall culture. The private sector understands this investment as an integral part of maintaining a consistent brand identity. The issue now arises as to what extent public sector and non-governmental organisations (NGOs) have developed such strategies to maintain clarity, consistency of values, and quality of practice within an increasingly diverse body of staff. This issue is highly pertinent, because organisations which originally started as small groups of like-minded individuals have grown into medium-sized corporate entities with a global workforce.

A review of the available literature and several interviews with non-Swiss international NGOs (INGOs) the Swiss government and universities operating in IC provided the basis for developing a self-assessment tool for development organisations to map where they stand regarding onboarding, onboard-keeping and offboarding. cinfo facilitated a survey in which cinfo members and partners assessed and individually reflected on their own practices and identified areas for further development. The discussions and findings provided an important body of knowledge for the September 2017 Symposium, where members and partners had the opportunity to learn from existing practices and discuss their own practices.

The paper has four sections:

- The overall analytical framework, setting out the background for the study of specific practices.
- The practice matrix:
 - Operational definition of the terms (onboarding, onboard-keeping and offboarding) based on the literature and case study reviews.
 - Discussion of good case examples from selected case studies.
- The cinfo member and partner practice survey, with a review of first results from discussions at an aggregated level.
- Conclusions and next steps: lists ideas and findings from the study and the discussions during the symposium, including potential refinements for the practice matrix, areas for action by member organisations, and areas where cinfo could take up a facilitation and coordination role.
- Brief summary of the symposium.
- Annexes: a section with references and resources for further reading.

For ease of use, the text is not heavily footnoted, though all references are found in the resource section in the Annexes. Most of the literature is oriented to practical use and contains many helpful resources, guides, checklists and examples.

Glossary

| | | | |
|--------|--|-------|--|
| cinfo: | Center for Information, Counselling and Training for Professions relating to International Cooperation | INGO: | international non-governmental organisation |
| Cuso: | Canadian Voluntary Service organisation | IO: | international organisation |
| DRC: | Danish Refugee Council | MSF: | Médecins Sans Frontières |
| FDFA: | Federal Department of Foreign Affairs | NGO: | non-governmental organisation |
| HFHI: | Habitat for Humanity International | SDC: | Swiss Agency for Development and Cooperation |
| HRBA: | human rights-based approach | SHA: | Swiss Humanitarian Aid Unit |
| HRD: | human resource development | SRC: | Swiss Red Cross |
| ICRC: | International Committee of the Red Cross | UDHR: | Universal Declaration of Human Rights |

II. The analytical framework

The intention of this paper was to develop a tool that assesses current organisational practice of onboarding, onboard-keeping and offboarding. The framework is based on the following underlying principles:

- A contractual arrangement between an employer and employee is understood as an employment life cycle, which covers onboarding, onboard-keeping and offboarding;
- HR practices have an impact on the individual and the organisation;
- Values determine organisational and HR culture and practices, particularly in NGOs.

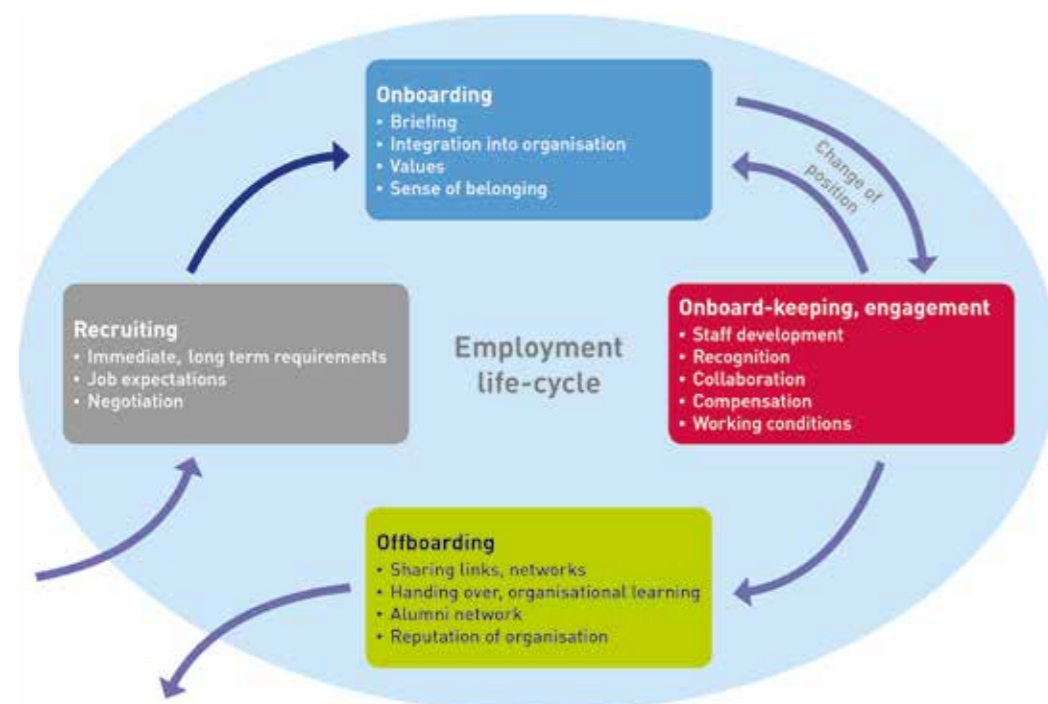
1. The employment life-cycle

We believe that the relationship between an individual and an employer should be understood as an employment life-cycle¹ (see graph 1). For each stage in a specific employment relationship, whether it be onboarding, onboard-keeping and offboarding, there are mutual responsibilities, obligations and potential benefits for the employee and the organisation.

info is particularly interested in exploring how organisations engage with their employees at each stage, as it has an impact not just on the internal functioning of the organisation but on its reputation and effectiveness: in attracting staff, in securing donor support, and in serving its intended beneficiaries.

The graph below shows the main stages of the employee life-cycle relevant to this document. It starts with recruitment, onboarding or integrating employees into the organisation, keeping them onboard, and offboarding. Employment life-cycles differ, as there are various types of employment. For example, the engagement of employees hired for specific projects is often limited and negotiated in advance. The objective of onboard-keeping for these employees is for the period of the contract. However, the employment life-cycle for permanent employees, whether they be Swiss, expatriate or local, may include a number of different assignments requiring additional onboarding into new roles and responsibilities. Keeping the overall cycle for different employees in mind can help organisations identify and address gaps.

Graph 1
Employment life-cycle



Source: authors' graph

¹ The 'life-cycle' is an image commonly used in HR literature. For example, see Elizabeth Lupfer: <http://thesocialworkplace.com/2012/03/putting-social-hr-in-its-place-the-employee-lifecycle/>.

2. HR practices of an organisation

This paper presents effective practices for organisations to consider, adapt and apply to improve their capacity to manage employees at various stages of the employment cycle. These practices are grouped into four areas, called the Four Cs, which are frequently cited in HR literature, particularly in the context of onboarding.² Since we use an employment cycle, we suggest that the Four Cs are used in all three stages:

- **Compliance:** largely concerned with administrative, legal and statutory processes.
- **Clarification:** the extent to which organisational norms and processes are made explicit and are understood by the employee.
- **Connection:** how individual employees connect with the organisation and its external network.
- **Culture:** how organisational values and principles are embodied at the level of employees.

3. The role of internalised common values in organisations



The Universal Declaration of Human Rights (UDHR) was proclaimed in 1948 by the UN as a common standard for all peoples and nations. It serves as a set of fundamental values for most organisations working in development cooperation or humanitarian aid.

Today, most Western humanitarian and development organisations apply a human rights-based approach (HRBA), using the UDHR as the basis

for specific tools and professional standards or as a core philosophy. However, the HRBA has been criticised as having a western-centric view which incorporates specific perspectives on human rights and cultural relativism, individual and collective rights, and rights and duties.

NGOs working internationally are increasingly conscious of the potential for tension between their organisational values and staff working in different national contexts. NGOs face two types of challenges: ensuring they work consistently with their own values, and contextualising those values in the societies and cultures where tensions may arise.

² For example in Bauer, Tayla (2013).

Some selected examples highlight such tensions faced by organisations:

- Habitat for Humanity, a Christian organisation, has a very strict policy against proselytizing. Although its actions are driven by Christian values, it seeks to find connection on common interests (the need for shelter). However, this is not an easy task, particularly where organisational values have not been clearly articulated and where the means for negotiating conflicts between the organisation's values and those of its partners or beneficiaries have not been defined.
- Cuso (a Canadian voluntary service organisation) uses the Universal Declaration and Canadian Human Rights law as a fundamental operational principle. Cuso representatives may not take part in actions which conflict with these (for example, not respecting the rights of LGBT people). Because Cuso makes these principles clear to both to its employees/volunteers and to its development partners, the potential for misunderstanding and conflict is reduced, although not eliminated.
- Helvetas' HR policies include two weeks' paternity leave. However, in project offices in many African countries, cultural norms are such that "no man would take such leave". In this case, while the leave is available to all staff, not everyone takes it or is required to take it.

Conflicts between an organisation's values and those of staff or partner organisations can be quite challenging. For example, some societies find it very difficult to accept women in leadership positions. LGBT individuals and people from various minority religious or cultural groups may also face significant social discrimination and legal barriers to equality in some countries. Freedom of speech is not protected in many countries, despite being considered a human right. NGOs who are serious about upholding UDHR will firstly ensure their staff are protected, but also work to model and reinforce inclusive and non-discriminatory behaviour of their staff and partners.

Articulating and acting in congruence with values requires commitment and resources. A study of public service values in Canada, Australia, New Zealand and the UK³ found that after defining their values, organisations also had to:

- audit or review actual practice compared with the values (organisations may 'preach one thing and do another');
- ensure that staff are aware of and have opportunities to practice values (for example some organisations have practice guides and support staff to exercise values through role play);
- and ensure that leaders act consistently with the values of the organisation in order to internalise values and make them part of an organisational culture.

Contrary to the common belief that a HRBA cannot be realised in non-western societies, a study⁴ of the Bangladesh office of an NGO found that educating staff about human rights and their practice helped them internalise the values and change their own perceptions and behaviours. Staff members were able to find congruence between international human rights norms and Muslim/Bangladeshi traditions and culture, even when these were not immediately apparent.

³ Kernaghan, Ken (2003)

⁴ Noh, Jae-Eun (2016)

III. The practice matrix

With the help of the literature review and case studies, we identified sixty practices relevant to development organisations as criteria: 20 for onboarding, 20 for onboard-keeping and 20 for offboarding. They were then grouped into the Four Cs for each stage (see table 1 below).

We further categorised practices into basic, active or advanced levels. Most organisations have practices at the basic level, while some have more sophisticated practices as part of an integrated HR management system. However, it is important to note that not all practices are appropriate for all organisations. The size, scope and structure of an organisation will determine the most appropriate practices.

**Table 1
Practice Matrix**

| | Basic | Active | Advanced |
|----------------------|-------------------------|--------|----------|
| Compliance | Description of practice | | |
| Clarification | | | |
| Connection | | | |
| Culture | | | |

The following sections provide an operational definition for each stage and describes how we used the terms in the matrix. The matrix served as the basis for self-assessment by cinfo members, which was done over the phone with cinfo. The findings are found later in the paper.

1. Onboarding

1.1 Operational definition

Onboarding is the process of integrating new employees into the culture and operations of an organisation in a way that maximises the mutual benefits for both the individual and the organisation. Onboarding practices are categorised as follows:

- **Compliance** through understanding rules and procedures, completing administrative processes.
- **Clarification** through understanding the job and making explicit both the employee's and the organisation's expectations.
- **Connection** through building effective interpersonal relationships and networks inside and outside the organisation.
- **Culture** through becoming attuned to the culture, values and norms of the organisation.

The figure below (graph 2) provides an overview of an 'ideal' process of onboarding. It addresses three processes: recruitment, orientation for new employees, and additional processes to support onboarding. The desired outcomes are for new employees to be familiar with the organisation, understand their role and responsibilities, and be integrated into the social structures and culture of the organisation. These add up to a successful onboarding. The figure also shows that onboarding is supported and reinforced by feedback, further training and coaching.

Though the duration varies based on function, role and responsibilities, the model suggests that onboarding generally takes more than 12 months.

1.2 Discussion

As noted above, onboarding is a process and takes time. Formal programmes typically set objectives for time periods such as pre-arrival, first day, first week or month, first quarter, six month and 12 months. These are usually linked to the organisation's probation and performance measurement policies. The literature cited in the Annexes provides a range of checklists with milestones. For example, the UNFPA Onboarding Guide suggests activities and content for pre-arrival, first day, week, month, three, six and twelve months.

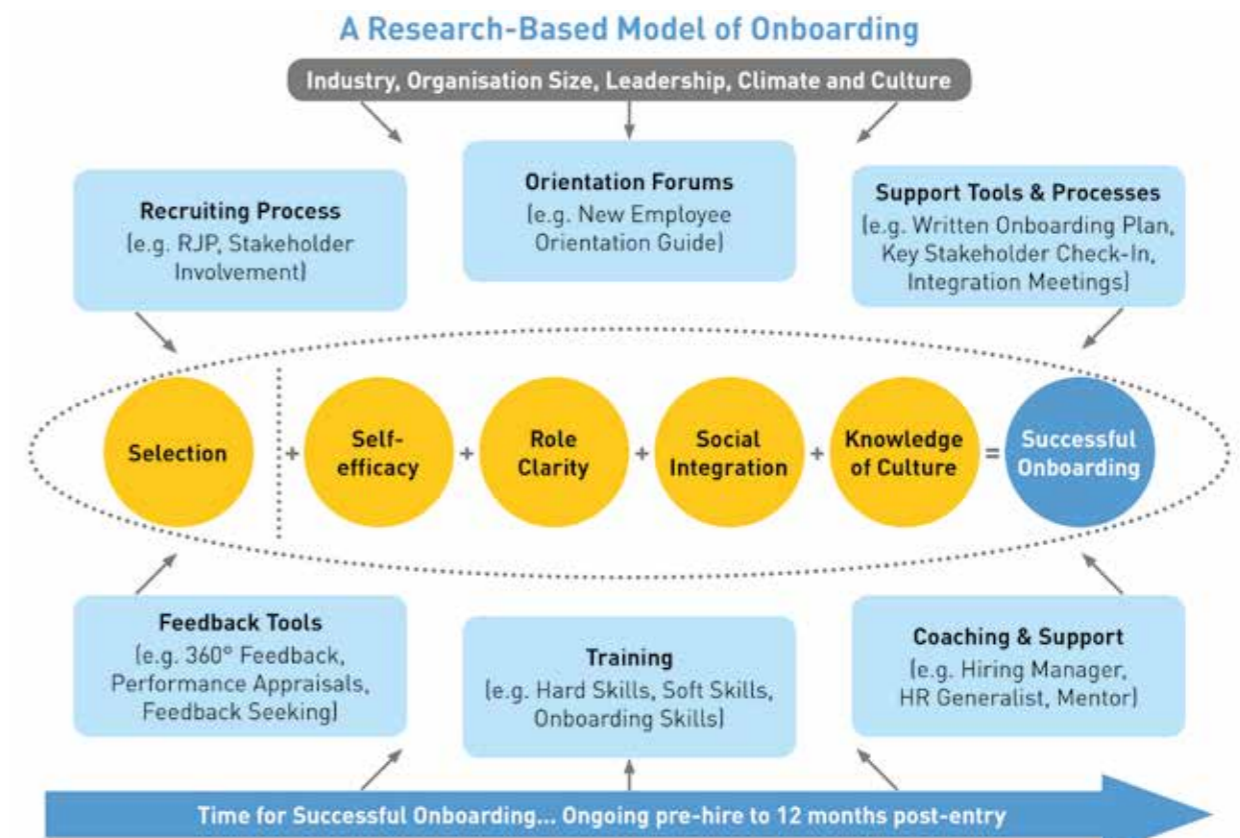
Effective onboarding involves multiple staff across the organisation in a range of roles: direct supervisor, HR staff, peers as 'buddies' or guides, and senior non-supervisory staff as mentors or coaches. Introducing new employees to all areas of the organisation and external networks is equally important. Finally, there is a responsibility for the new employee to actively participate in the onboarding process.

Formal onboarding requires organisations to be clear about their explicit and implicit expectations about what they want to achieve with the process.

Case study examples suggest that organisations involved in placing volunteers or trainees may invest in substantial onboarding processes that include formal training in operational requirements and ongoing assessment for 'values coherence'. For Cuso (Canada), an extensive 'volunteer journey' process is also a period of assessment for how an aspiring volunteer understands and applies Cuso values of partnership, respect, integrity and accountability in all their interactions. The Swiss organisations Comundo and Interteam also follow this pattern of extensive preparation for their co-workers.

Substantial staff increases in an organisation can challenge established onboarding practices that might previously have been effective. The Danish Refugee Council induction programme, for example, was designed when there were about 100 expatriate recruitments annually. However, now with about 2,000 recruitments per year, mainly outside Denmark, this approach is no longer workable and is being substantially

**Graph 2
Research based model of onboarding**



Source: Bauer, Talya Onboarding New Employees: Maximizing Success. SHRM Foundation, 2010

revamped. Swisscontact and Save the Children, among other cinfo members facing expansion, are also facing this challenge.

Organisations usually approach onboarding for short-term, field-based staff differently from regular hires, as found in the case studies and some cinfo member organisations. Habitat for Humanity, for example, has a well-developed onboarding programme used for HQ and regional offices. A very condensed version is used for staff hired for disaster response and emergency work. For these hires, quality and values coherence is addressed through a rigorous vetting process and by maintaining a list of pre-screened and past employees. Similarly, Terre des hommes and Helvetas have well-developed induction programmes for their Swiss-based and expatriate staff; but they have limited capacity for the same level of detailed onboarding for the more than 1,000 local staff under delegated management. The same difference is evident with some smaller organisations – Solidar Suisse, for example, has delegated management responsibility for its approximately 40 local staff and so cannot ensure consistency of onboarding practices. MSF is currently working to significantly expand their induction programme to ensure all staff are covered.

1.3 Onboarding practice matrix

A number of key practices were repeatedly observed when reviewing the extensive literature on onboarding⁵. They defined the criteria of the following matrix and are grouped into the Four Cs and into basic, active and advanced practices.

It is unrealistic to expect that most organisations are at the active or advanced level. In particular, smaller, less well-funded NGOs find it more difficult to achieve advanced levels compared to large, private sector organisations. However, there are still good examples of small NGOs successfully approaching the issue, which are shared later.

⁵ See the section on sources and further reading in the Annexes.

Table 2
Onboarding practice baseline matrix

| | Basic | Active | Advanced |
|----------------------|--|--|--|
| Compliance | Completion of forms required for employment. | Organisation has defined and consistently uses onboarding processes with responsibilities for all staff and timelines. | Responsibilities for onboarding are integrated into performance requirements for managers, staff and new employees. |
| Clarification | Employee receives copy of job description. | Manager or other responsible person works with new employee to develop job plan for initial period. | Manager and new employee's job plan for initial period includes specific onboarding goals and milestones, which are part of the probationary assessment. |
| | | Manager provides information on organisation's overall strategic/operational plans and how employee job relates to it. | Onboarding process is a period of continuing assessment of fit and appropriate developmental needs. |
| Connection | Employee is provided with staff lists and organisational charts. | New employee has opportunities to participate in organisational activities before formal start date. | New employee is assigned a mentor or 'buddy' to support them through their onboarding. |
| | | Employee is introduced to co-workers and key contacts inside the organisation. | Onboarding process includes, and may also be available to, outside partner organisations. |
| Culture | Employee is provided with information about organisational values, mission, etc. | Organisation conducts specific training or orientation for new staff on organisational values and ways of working. | Organisational values are explicitly linked to employee actions and performance, and integrated into performance plans and assessments. |
| | | Onboarding process includes opportunities to work with and be observed by peers and to receive feedback and support. | Onboarding process explicitly models expected behaviours, ways of working and values of the organisation. |

2. Onboard-keeping (employee engagement)

2.1 Operational definition

Onboard-keeping or employee engagement or retention refers to employees' job satisfaction and their commitment to the organisation's values, purpose and mission. High degrees of engagement are usually measured by higher productivity and commitment, higher client satisfaction, and lower turnover and employee absenteeism or illness (table 2). Organisations measure employee engagement through surveys and seek to improve engagement with a range of organisational processes and practices. Onboard-keeping can also be discussed by using the Four Cs:

- **Compliance:** how the organisation addresses basic employment conditions, health and safety, etc.
- **Clarification:** the degree to which employee and employer expectations and requirements are articulated and met, a critical element of job satisfaction.
- **Connection:** the extent to which an employee shares and is passionate about the values and mission of the organisation. This may be stated as 'commitment'.
- **Culture:** the employees' sense of belonging to an organisation which is responsive to their needs.

The following graph (graph 3) makes the connection between "onboard-keeping" or employee engagement and business outcomes (the 'drivers'), including productivity. Engagement, according to Aon Hewitt, means that employees:

- stay with the organisation;
- say positive things about the organisation; and
- strive to put their best efforts towards achieving the goals of the organisation.

Retention vs onboard-keeping or employee engagement

This paper uses the term "onboard-keeping" and references the HR literature on engagement to discuss this stage of the employee life-cycle. "Retention" has been used to refer to organisation's efforts to retain key staff and skill sets, but has been gradually replaced by the term "engagement". This is more realistic for an environment where contracts are time-bound. Hence the focus should be on building an optimal working relationship for the period of the contract to achieve the intended outcomes and results.

Graph 3
The Aon Hewitt Engagement Model



Source: 2015 Trends in Global Employee Engagement, Aon Hewitt, 2015

2.2 Discussion

Keeping employees onboard refers to maintaining their engagement and sense of connection with the organisation. For info members there are a different categories of employees for whom the definition and objectives of onboard-keeping may differ:

- Employees based at the Swiss HQ or posted abroad who are expected to have a longer-term connection with and commitment to the organisation.
- Local employees of offices of the organisation outside Switzerland. Generally these employees are not eligible for posting to other offices/countries, although they may have long-term careers with the organisation.
- Employees recruited internationally or locally for a specific, time-limited project or intervention in a country outside Switzerland. This is increasingly the majority.

For the first two categories, much of the existing literature on employee engagement is relevant. It speaks to the different motivators for retention, including compensation, working conditions, equity of treatment, sense of control within one's role and organisation, etc. Practices including effective job design, good working conditions, a healthy corporate culture which encourages work-life balance⁶ and leadership that builds trust and motivation are widely cited in the literature⁷.

A critical element of employee engagement in organisations is to what degree employees reinforce values and promote the 'brand' and reputation of the organisation in their area of work. Where there is a significant disconnect between employee practice and the organisation's stated values, it has a negative impact on the reputation and effectiveness of the organisation. NGOs have developed a wide range of strategies other than pay to improve employee job satisfaction, commitment to the organisation and passion for their cause⁸. Some include:

- actively measuring engagement (job satisfaction) of employees, using the right indicators to measure organisational health;
- supporting and developing managers who inspire their staff and encourage them to stay engaged;
- reinforcing the purpose of the organisation and how the employee's work supports this;
- investing in specific training and development for employees;

⁶ Work-life balance is a commonly used term. A recent German language book on this is <https://www.hogrefe.ch/shop/work-life-balance.html>.

⁷ Attridge, Mark (2009)

⁸ Ngo, Trung (2015)

- communicating expectations and encouraging exchanges between staff in different areas;
- giving employees as much autonomy as possible within the scope of their responsibilities and interest.

Larger organisations and various government public services carry out regular (often biennial) engagement surveys of staff. In the case of the Danish Refugee Council (DRC) and the Province of British Columbia, Canada, the results of these surveys are significant: managers' performance appraisals and pay depend on results, and improvement goals are set and action plans launched to address issues (see Annexes for details).

Using employee engagement information

Employee engagement measurement tools should be done with a goal in mind: To inform or train? To assess understanding/compliance with organisation values and practices? To assess management effectiveness? The purpose will help shape the process. The HR Council of Canada tool referenced in the bibliography includes sample data collection and analysis strategies.

In smaller organisations, less formal approaches can collect engagement data to be used as indicators for an employee friendly organisation. Swiss Red Cross, Helvetas and Swisscontact have carried out employee satisfaction surveys, some on a regular basis, with SRC noting that this information is published internally. By contrast Solidar Suisse noted that they had done a survey but did not take specific action after it – and as a small organisation they were not sure that a survey was the best mechanism.

2.3 Onboard-keeping practice matrix

As with onboarding, the literature on engagement has a number of key practices, which are shown in the matrix below, using the Four Cs and basic, active and advanced levels. Again, many of the practices may not be relevant or achievable depending on the size and scope of an organisation, at least not as formalised processes. However, all practices can encourage thinking about engagement, which is relevant to all organisations.

Table 3
Onboard-keeping practice matrix

| | Basic | Active | Advanced |
|---------------|---|---|---|
| Compliance | Organisation tracks retention/turnover rates. | Organisation sets compensation rates that are fair and appropriate for the requirements. | Organisation establishes working conditions and compensation policies in a transparent way and with staff input or participation. |
| Clarification | Organisation requires regular review of employee job performance. | Organisation provides working conditions (including safety and security) that are fair and appropriate. | Organisation regularly surveys staff working conditions and compensation in terms of employee satisfaction and in relation to comparable organisations. |
| Connection | Organisation has and actively uses intranet or other means of internal communication for staff. | Organisation has an employee engagement policy or objectives. Employee performance assessment is integrated into overall organisational reporting and progress reporting. | Organisation undertakes regular assessments of employee engagement, reports on the findings and takes action to address gaps. Management performance assessments are based on HR/leadership metrics and organisational goals. |
| Culture | Organisation has a process for receiving and addressing employee questions and complaints. | Organisation has regular forums for general staff meetings and discussions. Organisation has a structured process to reinforce and connect employees with the values/purpose of the organisation*. | Organisation offers opportunities for staff exchanges/work in and with other areas of the organisation. Organisation regularly assesses employee engagement with organisational values and mission, and takes steps to address gaps. Organisation has a transparent process for setting organisational policy that includes staff input or participation. Organisation has and uses career and leadership development programme(s) aligned with organisational values. |

* For example, in faith-based organisations, regular devotional meetings. In other organisations, opportunities to reflect on the organisation's values as they connect to personal values or interests.

3. Offboarding

3.1 Operational definition

Offboarding refers to the process of exiting or ending a contract between an employee and the organisation. It involves a number of aspects similar to onboarding. Offboarding can also be discussed using the Four Cs:

- **Compliance:** the technical and procedural issues relevant for ending the employment relationship, including payments, handover of assets, data access, etc.
- **Clarification** of roles and expectations following the end of the employment. How are resources and ongoing projects and activities handed over to the organisation, and what expectations are there from the organisation about availability for questions or for use of information after the contract comes to an end?

▪ **Connection:** to what extent will the ex-employee remain part of formal and informal networks of the organisation? What steps are taken to stay connected?

▪ **Culture:** How will the ex-employee's future actions impact the organisation?

The following graph (graph 4) highlights an 'ideal', step-by-step roadmap for an employee offboarding process, which organisations can use as a systematic guide in the future. Offboarding includes both administration, handover and the process of negotiating a positive post-employment relationship.

Graph 4
Employee offboarding roadmap – the big wins of a positive goodbye



Source: Silk Road* Ultimate Offboarding Roadmap, see onlinesource

* <https://www.silkroad.com/resources/offboarding-roadmap-transitioning-employees/>

3.2 Discussion

Offboarding, other than the basic administrative processes of ending a contract, has only recently gained momentum as important feature of an employment cycle. Good offboarding today considers the whole of an employee's connection to the organisation and seeks to maximise the benefits and minimise the negative impact of their departure at various levels:

▪ **Knowledge transfer:** the departing employee may have a wide range of knowledge, both explicit related to specific activities of the organisation, and implicit, in terms of their connections inside and outside the organisation and deep knowledge of the organisation culture. Ensuring a transfer of this knowledge to successors can be a challenge and will be more likely if the departing employee feels cared for until the end of the employment relationship.

▪ **Reputation:** many organisations, but perhaps NGOs in particular, see themselves as a broader community to which an individual continues to belong. As Habitat puts it: "You may leave Habitat, but Habitat never leaves you." Many organisations see their former employees as ambassadors and representatives of the organisation, and keep in touch through active 'alumni' groups or informal networks.

▪ **Organisational learning:** departing employees may be the best source of information about problems within an organisation. Finding out why people leave, as well as tracking patterns of turnover, are effective ways to uncover and diagnose issues that require attention.

▪ **Personal wellbeing:** departing employees exposed to stressful and dangerous situations may experience an impact on their personal wellbeing. In addition, many duty stations are not family postings. Coaching or counseling for a specific traumatic situation during, after the event and overall as a part of a mandatory debriefing will ensure that an employee feels cared for by the organisation.

Many organisations offer exit interviews or de-briefings as part of the separation process, but this information may not be aggregated, analysed and used for internal improvement. Organisations which systematise this process, for example by using online survey forms or a formal, documented debriefing session, find this information invaluable. Employees also experience the process as positive, as it enables them to share their experience and contribute towards organisational improvement. Most Swiss NGOs interviewed have formal exit interview processes, aimed at achieving a good relationship with past employees and a good impression of the organisation.

Providing opportunities for departing employees to mentor their successor (for specific job tasks or in general) can also support organisational learning and transmission of knowledge and values, and indicates an appreciation of the contributions made by the departing employee.

Offboarding should be as consciously planned as onboarding or onboard-keeping. Strategies should be appropriate to the size and scope of the organisation and its objectives. For example, an organisation that needs to frequently recruit short-term staff for disaster work or technical cooperation should maintain rosters and keep in active contact with past high-quality employees, as Habitat and various Red Cross organisations do. Organisations whose expatriate posts are in high-risk, stressful, or dangerous settings need to track turnover data and exit information to identify factors that will help them attract and retain staff who can be successful in these positions. Staying in touch with retired or departed senior/long-term staff may make it possible to consult them as expert advisors or 'elders', as needed.

3.3 Offboarding practice matrix

Comprehensive offboarding is new. Nonetheless, private and public organisations and NGOs have developed a number of effective practices that benefit both the organisation and the departing employee. The matrix presents these according to the Four Cs and level of practice (basic, active and advanced).

IV. Results of cinfo practice survey

Table 4
Offboarding practice matrix

| | Basic | Active | Advanced |
|----------------------|--|---|--|
| Compliance | Completion of forms required for separation. | Organisation has a defined offboarding process. | Organisation regularly assesses turnover data and impact to identify areas for strategic attention (e.g. improvements in onboarding and engagement). |
| | | Organisation provides standard documentation of employment record on request. | Organisation works with others in the same sector to develop and implement policies for staff movement between organisations to minimise costs. |
| Clarification | Any post-employment rules are defined and shared (e.g. post employment contracting). | Organisation has a defined knowledge transfer policy/process to ensure handover of key expertise. | Organisation provides for apprenticeship or mentoring process for successors leading up to employee departure. |
| | | Organisation has explicit policies regarding periods of notice and requirements for transition that respect both employee and organisational needs. | Organisation provides for 'post-employment' relationships (e.g. to reflect needs for follow up questions, etc.). |
| Connection | Organisation recognises past service with the organisation in future employment. | Organisation maintains a roster of past and pre-screened employees for rapid recruitment and deployment. | Organisation follows up with short-term (project) employees after contract completion to collect feedback on the project, areas to improve, etc. Data is analysed and used for improvements. |
| | | Organisation creates opportunities for existing staff to learn from departing employees, emphasising general rather than job-specific issues. | Organisation maintains an active 'alumni' network through means such as dedicated website or page, hosting meetings, etc. |
| Culture | Organisation provides opportunities for exit interviews. | Organisation sees former employees as potential ongoing advocates for the organisation and its mission, and takes steps to reinforce this. | Exit processes include an easy-to-complete exit feedback form, with data collated and reported on regularly as an organisational tool. |
| | | Organisation's profile on social media and rating sites is monitored to track reputation/brand issues. | Organisation takes active steps to manage how the organisation is reflected in social media, on rating sites, etc. |

1. Results from NGOs and international organisations

cinfo interviewed 15 member organisations and assessed their practices by using the matrix of 60 questions (see Annexes). As already mentioned a distinction was made between 'basic, active and advanced' levels of practice. The total number of practices were added for each stage, with 1-5 being basic, 6-14 active and above 14 as advanced. A point was given for each question answered as positive, so that for each stage of the employment cycle (onboarding, onboard-keeping and offboarding) a maximum of 20 points could be achieved. The analysis also distinguished between employee categories (e.g. Swiss Nationals and expatriates, local employees and consultants). Each participating organisation received an individual report, showing the organisation's results, which was benchmarked against the average achieved by the entire sample group.

1.1 Aggregated summary

The table below (table 5) shows the average aggregated values which were achieved by the 15 organisations for onboarding, onboard-keeping and offboarding for both the expat/HQ employee category and the locally hired category. A more detailed summary is found in the Annexes.

Finding 1: Most organisations focus on onboarding and onboard-keeping. Organisations have more active and advanced practices for these two stages than for offboarding. As noted in the discussion, offboarding is a relatively new practice, where organisations may have limited experience, or, in the case of very small organisations, limited capacity for extensive processes.

Finding 2: More focus on Swiss-based, Swiss contracted employees (incl. expats). In general organisations have a higher overall rating (meaning that they fully implement more of the practices) for Swiss-based, Swiss contracted and mobile/expatriate employees than for those hired locally outside Switzerland. Some organisations have very few staff outside Switzerland, for others the majority of their employees are local hires. A number of organisations noted that many of the HR processes for their locally hired staff were delegated to local management, and so they had limited authority or control over them. Some organisations, such as Helvetas, are planning to address this by bringing in more consistent data collection and management for all staff.

Finding 3: Few differences between administrative and professional staff. Apart from the local/expat distinction, most organisations said that they do not differ between processes for professional and administrative staff. While specific induction content depends on the job, the overall process, duration and purpose was similar for professional and administrative staff.

Table 5
Average scores, taken from 15 organisations

| | Category A Swiss nationals or expatriates working in Switzerland or abroad, under Swiss law, with an unlimited or fixed-term contract, who may or may not be mobile. This group includes both professional and support staff. | Category B Employees hired outside Switzerland according to local law, generally nationals of the country in which they work, generally non-mobile. |
|-------------------------------|--|--|
| Onboarding (/20) | 12.1 | 7.9 |
| Onboard-keeping (/20) | 12.3 | 8.2 |
| Offboarding (/20) | 10.1 | 7.1 |
| Total (/60) | 34.5 | 23.2 |

Note that the rating scale for each row is Basic: 1-5; Active: 6-14; Advanced: 15-20

1.2 Summary for onboarding

Table 6
Average scores for onboarding

| Onboarding | Category A | | Category B | |
|---------------|------------------|----------|------------------|--------|
| | Score (out of 5) | Rating | Score (out of 5) | Rating |
| Compliance | 3.2 | Advanced | 2.3 | Active |
| Clarification | 3.2 | Advanced | 2.5 | Active |
| Connection | 3.0 | Active | 1.5 | Basic |
| Culture | 2.6 | Active | 1.5 | Basic |

Note that the rating scale for each row is Basic: under 2; Active: 2-3; Advanced: over 3

Most organisations do a good job of addressing **compliance** issues in onboarding: making sure employees are properly documented, have the tools they need to work, and so on. For both Swiss contracted and expatriate staff, considerable attention is also given to **connection**: building relationships and networks needed to quickly belong to the organisation and succeed. Organisations also take steps to ensure that their employees understand the requirements and expectations of their job (**clarification**) and the **culture** of the organisation, including its values. However, the average score on **connection** and **culture** is much lower for locally hired staff than for the Swiss/expatriate group. This may be largely due to the fact that for organisations with large numbers of local staff, the management has responsibility, while HR staff at headquarters has little involvement in onboarding processes, even if in principle the same guidelines apply.

Some innovative onboarding practices highlighted by info members include:

- Inviting local partners to participate in the onboarding process so that they are aligned with organisational values (MSF).

- Having an explicit Code of Conduct, which prescribes how all staff are expected to act and helps new employees learn the ropes more consistently (e.g. Medair, Safe the Children, Swissaid, Swisscontact).
- Dedicated induction programme for new staff (e.g. SRC, ICRC, Helvetas, Terre des hommes' "Semac"-Semaine d'accueil). Comundo and Interteam's partially shared programmes are an important part of these organisations' culture. Pestalozzi's programme is customised to each new employee but consistency is assured by HR staffs' direct involvement.
- Making sure the first day at work is special and that employees are welcomed and quickly integrated is an important part of onboarding for Swissaid and the Swiss Tropical and Public Health Institute, among others: "We replaced powerpoints by things which can be touched, 3D-models to remember."
- Medair requires all applicants to complete a detailed training programme (The ROC – Relief Orientation Course) as part of their recruitment. This exposes applicants to simulations and clarifies the organisation's expectations and ways of working.

1.3 Summary for onboard-keeping

Table 7
Average scores for onboard-keeping

| Onboard-keeping | Category A | | Category B | |
|-----------------|------------------|----------|------------------|--------|
| | Score (out of 5) | Rating | Score (out of 5) | Rating |
| Compliance | 3.8 | Advanced | 2.6 | Active |
| Clarification | 2.4 | Active | 1.6 | Basic |
| Connection | 3.1 | Advanced | 1.8 | Basic |
| Culture | 3.0 | Active | 2.2 | Active |

Note that the rating scale for each row is Basic: under 2; Active: 2-3; Advanced: over 3

Most organisations have an advanced level of practice in **compliance** (maintaining appropriate working conditions, pay, etc.), at least for their Swiss-contracted and expatriate staff. They also meet the minimum and statutory requirements for local staff. Relatively few organisations have formal employee satisfaction or engagement surveys, but most have employee performance measures, reflecting active levels of practice in the area of **clarification**. Organisation-wide communication practices reinforce employee attachment to organisational values so that **connection** is active for the Swiss-contracted staff in most organisations. Finally, most organisations were active in **culture**, for example, allocating resources for staff development. Similar to onboarding, average scores for local staff were significantly lower. Again, this may reflect devolved staff management and limited involvement of central HR offices.

Some innovative onboard-keeping practices highlighted by info members include:

- Significant investment in ongoing professional development and training (ICRC, Solidar Suisse).
- The "Leadership Circle" which is a regular forum for Helvetas leaders to discuss their challenges and receive advice and support from peers.
- Annual meetings for thematic groups and regions ensure that managers and project staff have regular updates and exchange about the latest developments (Swisscontact, Pestalozzi); a biennial conference for all staff in Solidar Suisse, Swissaid.
- Being able to involve all staff directly in policy development is an advantage of smaller organisations (Pestalozzi, Swissaid).
- Good working conditions and a fair and transparently established salary scale is seen by Swissaid, and increasingly by other organisations (Solidar Suisse), as one of their strong practices in this area.
- Having an explicit commitment to care for staff (Medair) is seen as creating a positive working environment in often very challenging conditions. This also happens for example through free fruit and standing desks for all employees (World Vision).
- Use of Facebook as an internal communications and connection platform (Save the Children), a monthly newsletter highlighting activities in all regions, produced in local languages (Comundo).
- Annual all-staff recreation days to build community spirit is a common practice in most organisations.

1.4 Summary for offboarding

Table 8

Average scores for offboarding

| Offboarding | Category A | | Category B | |
|---------------|------------------|----------|------------------|--------|
| | Score (out of 5) | Rating | Score (out of 5) | Rating |
| Compliance | 3.3 | Advanced | 2.7 | Active |
| Clarification | 1.7 | Basic | 1.3 | Basic |
| Connection | 1.8 | Basic | 0.8 | Basic |
| Culture | 3.8 | Advanced | 2.3 | Active |

Note that the rating scale for each row is Basic: under 2; Active: 2-3; Advanced: over 3

Not surprisingly, organisations had stronger practices in compliance and culture. In the case of **compliance**, they meet the legal and administrative requirements for termination for both Swiss-contracted and local staff. Organisations also reported efforts they take to maintain a positive reputation by monitoring and participating in social media, an aspect of **culture**. **Clarification** practices such as knowledge transfer are practiced to some extent but may not be formal or consistent. In the same way, while organisations recognised the value of maintaining contact with past employees, these **connection** practices tended not to be consistently used or formalised. Again, scores for local staff were significantly lower.

Some innovative offboarding practices highlighted by cinfo members include:

- Most organisations conduct exit interviews and use the findings to inform management and planning. Helvetas uses a two-part process: a thematic debriefing with the supervisor and an exit interview with HR. In other organisations HR is involved and the process is somewhat standardised to ensure good data collection (Solidar Suisse, Swiss Red Cross, Comundo, Save the Children, Pestalozzi, Swiss Tropical and Public Health Institute). Swiss Red Cross noted that it prepares an annual review of its findings.
- Knowledge transfer is an important issue for many organisations. Many said that while they try, it is not always possible to ensure some overlap between departing and successor employees. Some organisations (Pestalozzi) have a very established knowledge management process which eases

transition, while others do what they can to allow for formal and informal knowledge transfer and successor training.

- Most organisations actively monitor social media and employer rating sites to ensure that their organisation is well represented (e.g. Swisscontact, Swiss Red Cross, Comundo, Save the Children, Helvetas).
- Comundo has a detailed offboarding process for its co-workers. This includes a discussion with the CEO and tracking information from this process. They also retain a fairly active alumni network of Italian-speaking former co-workers.
- Save the Children Switzerland has an explicit offboarding strategy; regardless of whether the termination was initiated by the organisation or the employee, they seek to find a positive end to the relationship through a productive, honest discussion that is win-win for both. Similarly, Solidar Suisse and many others reported that they wanted separation to be a positive experience, and that this was important for future recruitment. Many organisations stated that they remain on good terms with ex-employees, who they see as their advocates.

1.5 Selected innovative practices for promotion of values

Organisations made a number of observations about how values guide their HR management. For some, values are implicit in their HR policies and employee assessment systems (e.g. Swisscontact, Helvetas, Solidar Suisse). However, some expressed concern that policies are not always followed or values fully reflected in field locations. Many highlighted how staff working for their organisation have their personal values well aligned with those of the organisation (e.g. MSF, ICRC, Mission 21, World Vision) but acknowledged a need for processes to reinforce and 'freshen up' connection to those values. Several organisations spoke about the need to put more emphasis on value education during onboarding and as part of ongoing professional development and performance assessment. Others spoke of the need to ensure that senior management, in particular, explicitly "live the values" of the organisation to lead staff members. A further concern was that field staff may not fully understand or act according to the values of the organisation. This is addressed through strategies such as having a concrete Code of Practice applicable to all staff; and through efforts to bring staff together for regular training, meetings and information exchange, although this can be costly. Finally, the issue of staff stress and burnout was raised by a number of organisations working in humanitarian and disaster relief. Faith-based organisations may use practices such as devotions to help staff cope, others ensure they have internal mechanisms for staff to raise concerns.

Vision, values & standards

DRC today has over 6,000 staff, of whom fewer than 3% are Danish. Recognising the need to more clearly articulate the values and culture of the organisation and to institute HR and management practices in line with this, the DRC developed a document called "Vision, values & standards" which includes the overarching values compass, and within that, concrete standards for management and cooperation that enable the organisation to be very specific about how they 'live their values'. Today, DRC has clearly defined processes for onboarding, onboard-keeping and offboarding. Employee satisfaction surveys every three years, coupled with other personal development initiatives led to attrition rates far below industry average. A sound offboarding is well reflected in positive ratings and more visibility on increasingly important social media like Glassdoor (see Annexes for details).

2. Results from training institutions

cinfo also interviewed two Swiss training institutions (HAFL and NADEL), which offer programmes with a mandatory assignment abroad. These are closely coordinated with selected organisations working in international development cooperation, thereby ensuring relevance for the labour market. This is important to the discussion on onboarding, onboard-keeping and offboarding for two reasons. Firstly, the minimum 6-month deployment reflects the reality of postings in the IC sector. Secondly, experiences with an organisation abroad are seen as a first step towards successful onboarding and onboard-keeping within the sector overall and within an organisation. If organisations provide good mentoring, the students might stay in the project or sector, or might join the organisation as a future employee. These case studies are of mutual interest for all three actors involved: Universities provide relevant training, projects and organisations receive well-prepared students, and students gain the professional experience required to enter international cooperation.

2.1 School of Agricultural, Forest and Food Sciences (HAFL)

The Bachelor in Agricultural Sciences, with a focus on international agriculture, entails a mandatory six-month assignment in projects implemented by a range of international or local institutions abroad. The key aspects of the programme are briefly described below. More detailed information can be found in the Annexes.

- Prior to their studies in agricultural sciences at HAFL, all students, including those who later specialise in international agriculture, must have completed practical training in agriculture on a Swiss farm.
- To find suitable organisations, HAFL relies on its staff experience in international agriculture and on a broad, informal network of more than 200 host organisations, including: Swiss NGOs (e.g. Helvetas, Swisscontact, HEKS, VSF); international and local NGOs; development agencies (GIZ, SDC); global businesses (Nestlé, Syngenta); foundations (Syngenta foundation); national universities (e.g. Peru); international research institutes (e.g. CIP, CIAT, ILRI); and Swiss research institutions (Swiss TPH, FIBL, Agroscope) with research projects abroad.
- Students in international agriculture are sent neither to conflict regions, nor to 'western, developed' countries.
- The host organisation and student develop terms of references jointly with the supervisor from HAFL. The three parties also sign a contract describing the responsibilities.

- Parallel to the administrative preparations, students prepare themselves for the posting by acquiring knowledge of the subject through the PBL-method (Problem-Based-Learning) and by attending specific preparation courses on intercultural issues, health and security, planning of the internship, etc.
- Field research for the bachelor thesis is done in the field with close co-supervision by the host organisation and HAFL.
- Each HAFL supervisor visits his/her students in the field.
- Very few students have quit the internship since its inception in 1994. While students had to change country because of political events (e.g. Rwanda in 1994), very few (only 2 or 3 out of 243 students in 23 years) quit their assignment earlier due to health problems or because they could not cope with the situation (problems coping with remoteness or poverty).
- In many cases, HAFL sends students to the same projects over a few years, which indicates that organisations also benefit from this initiative.
- Students evaluate all modules in international agriculture, including preparation modules and the field assignment.
- This programme significantly increases student employability. Besides developing their languages skills, they gain experience in living in difficult contexts and learn to be more flexible and potentially more open. These relevant soft skills and experiences can also help them to find a job in Switzerland, even if their studies focused on the international context.

Challenges

- Nowadays, project activities are increasingly implemented by local NGOs. Swiss NGOs have a more distant role as project facilitators. As the contract host, local partners often do not have the same interest in or understanding of BSc studies and field assignments, which has increasingly led to misunderstandings and frustrations.
- HAFL is currently reflecting on how much 'handholding' is required for students to feel well-supported and to maintain the good reputation of the programme.
- It is becoming more difficult to receive sufficient project propositions due to financial reasons.

2.2 Center for Development and Cooperation (NADEL)

As part of the Master of Advanced Studies (MAS) in Development and Cooperation, students spend eight to ten months abroad. SDC finances the programme, including flight, insurance, food and housing. Key aspects of the programme are briefly described below. More detailed information can be found in the Annexes.

- Students are posted in the field, never at the headquarters.
- To maximise their learning experience, students are posted in an ongoing project, in a position that meets a real need of the project and includes a component of implementation.
- It is important to make the host organisations understand that students are not interns but rather project assistants, able to carry out specific tasks.
- One person from the project is the responsible supervisor, but does not have to be the official project leader. Different documents are provided to organise the assignment, including agreements and guidelines (template from NADEL), code of conduct concerning security and safety and preliminary specification sheet. All documents are signed by the hosting project and organisation, the student and NADEL.
- After the assignment, both the project supervisor and the student separately complete an evaluation of the assignment. A debriefing should take place in the project, with the organisation (HQ) and NADEL.
- Graduates have a high employability rate. Some already have a contract by the time they return from their assignment.

Challenges

- To date, difficulties have arisen for personal reasons, such as health problems and misunderstandings or lack of communication with the project leader and local staff members, rather than because of unrealistic work demands. NADEL offers distant coaching via Skype. As prematurely terminating the assignment would mean the end of the MAS, NADEL endeavours to settle disagreements whenever possible.
- Due to the complex structure of projects and programmes, the challenges increase according to the position of the NADEL student and their responsibilities in the working environment.

2.3 Ideas for further collaboration

The aim is to create a win-win situation for all parties involved:

- Students are exposed to the complex realities of international cooperation and gain professional experience in this environment through an ongoing project.
- Training institutions provide training that prepares students to work in the field of development cooperation, and maintain and expand their network with interested organisations.
- Host organisations accept students to carry out tasks within their projects for which funds and/or knowledge is unavailable.

Some ideas for future collaboration include:

Training institutions:

- In dialogue with potential host parties, integrate into the curriculum a mandatory assignment abroad with an NGO, private business, multilateral organisation or government actor. Alternatively, provide opportunities for assignments abroad as part of the curriculum, which accrue credits for students.
- Ensure sufficient supervision at all stages.

Host organisations:

- Integrate student assignments as an investment for the future.
- Provide an organisational culture that encourages new ideas and input from younger people.

info:

- Provide support for collaborations (tools, frame work, coaching, etc.).
- Provide framework to discuss and develop concrete steps for collaboration.
- Promote the relevance and proximity to labour market needs of courses that have a practical component in their curriculum.

UN University Volunteers modality

UN Volunteers started collaborating with universities to provide young academics with the opportunity to gain experience in and contribute to a UN organisation. This programme will be further developed to prepare students for the labour market and to help them understand the UN.

3. Results from selected Swiss Government departments

The Swiss government is another important actor and close partner of info. The Federal Department of Foreign Affairs (FDFA) and the State Secretariat of Economic Affairs (SECO) both participated in the survey because of their IC mandates. Although the Swiss Humanitarian Aid Unit (SHA) is a part of the FDFA, it was interviewed separately because of its expert corps, which regularly posts professionals to support humanitarian aid in Switzerland's priority areas.

As these departments are part of the Swiss Government, it is not very surprising that most criteria under "compliance" have very similar levels, as defined by the Directorate for Human Resources. All departments use the management by objectives technique (MBO technique) at all three stages (onboarding, onboard-keeping, offboarding) and all share certain processes. In offboarding this includes exit-interviews and a systematic handover, for example. They differ more regarding "connection" and "culture". In summary, all three entities have similar HR policies and guidelines, but the "content" and how they realise these differs depending on their organisational culture and thematic focus.

It is particularly interesting that the processes for employees abroad or transferable staff are more innovative, extensive and specific than for staff at HQ. Expats and transferable staff are well trained because they represent Switzerland and the government abroad. Looking at the results of the NGOs, it is remarkable how they provide a similar standard for both their HQ and expat staff. The results for the Swiss government show that there is still a difference between these two categories. The goal would be to provide the best possible processes to all staff, including local staff, which has the lowest standard in both NGOs and the government.

Since the matrix was designed for INGOs, not all criteria were applicable to state actors. This needs to be taken into account when reading the following results.

3.1. State Secretariat for Economic Affairs (SECO)

SECO has around 750 staff members at the HQ and ca. 40 employees abroad. Together with the network of Swiss representations abroad, which includes embassies, consulates, cooperation offices and missions, in development banks, EFTA, etc., SECO provides a structured introduction plan for all staff as a part of their **onboarding process**. The two-day induction course includes mandatory components on SECO and HR processes, organisation values, etc. The induction courses are mandatory for all staff members who have at least a two year contract. Expat staff to be deployed to development banks or EFTA, etc. receives their onboarding in the respective organisation. At least 3 years of working experience at SECO headquarters are required to qualify for a deployment abroad. Open communication is most important during the period of onboarding and combined defined policies and written guidelines.

In the eyes of SECO, **onboard-keeping** is not a significant challenge, as many people value the advantages and benefits of working at SECO (e.g. very interesting labour content, good employment conditions, job security, etc.). SECO provides attractive staff development opportunities in addition to the offers of the federal education centre of the government. They include communication, improving reading and writing skills, technical subjects and a range of language courses. In some areas specifically required competencies are developed and an individual training takes place which is relevant as preparation for a deployment abroad.

Employees are also invited to join the SECO forum several times a year where they receive information about current activities and have the opportunity to ask questions to the director. An annual SECO event takes place once a year and several events are organised independently (retreats, team events, trainings, etc.). An annual retreat is organised for expats in the headquarters. The dynamic and flexible working style and the very interesting topics at SECO make many employees proud to call the department their employer.

According to SECO, the biggest room for improvement is in the area of **offboarding** concerning the returning expats. Although employees returning from abroad are guaranteed a job at SECO, career development opportunities and pathways need to be better managed. They have to actively seek for their re-entry and apply for positions. Furthermore, knowledge transfer processes could be enhanced between former employees and their successors to ensure a quick onboarding of newcomers in a job.

3.2. Federal Department of Foreign Affairs (FDFA)

The FDFA is divided into three categories: ca. 1'200 employees at HQ, ca. 3'200 local staff and ca. 1'200 staff for the diplomatic staff, consular representation and SDC junior staff programme in international cooperation. Local staff are often managed locally by the Swiss representation. However, all three stages (onboarding, onboard-keeping and offboarding) differ between the first (HQ staff) and the third category (diplomatic staff, consular representation, junior staff programme). During **onboarding**, the latter attend a two-month induction and a six month stage at HQ before going to the field for 15 months. For other staff categories, the onboarding process is more classical (meetings, trainings, orientations in the first week) and, according to the FDFA, could be further developed. The goal is to provide a similar sense of belonging to their employer. For now, there is a gap between HQ staff with more administrative roles and the transferable staff (diplomatic staff, junior staff programme) who represent the Swiss government. For a fruitful collaboration it is essential that all staff realise their own role and importance in the processes. Therefore, a common identification with the goals and values of the FDFA is necessary.

According to the FDFA, **onboard-keeping** is not considered the most pressing issue due to the many advantages of working for the federal administration, but issues as appropriate working conditions are taken very seriously. One of the ongoing discussions includes easier job access for lateral entrants from the private sector. Employees should be able to move between functions and sectors, with the opportunity to return to the FDFA at one point.

According to FDFA, **offboarding** is not a priority since many employees stay for a long time. There is great potential in that area, especially when considering former employees as advocates. However, similar to the SECO and to onboard-keeping, the pressure to improve remains relatively small.

3.3. Swiss Humanitarian Aid Unit (SHA)

The Swiss Humanitarian Aid Unit (SHA) is a roster with pre-screened candidates (expert pool) who keep themselves ready for deployment. In case of an emergency or a vacancy these candidates are contacted and sent to the field. The SHA members are deployed for short- or long-term missions. The HR staff in charge of these candidates is part of the Domain Humanitarian Aid of SDC (SDC/HA) and belongs therefore to the FDFA staff.

In most cases, **onboarding** does not take place right before the mission. Newly selected experts participate in a one week training to be prepared before their deployment. These trainings are held together with new staff from HQ and selected National Programme officers. Till now, the quality of onboarding is not systematically measured or analysed, but in general shows good results. Another strong initiative within SHA is their junior programme that lasts from six to twelve months. During this first deployment a coach is assigned to the person and they have mutually agreed objectives for the introduction. Furthermore, onboarding starts already during the recruitment process when values and ways of working of SHA are clearly discussed and communicated.

Since SDC/HA does not offer regular and fix term employments for their SHA experts, retention too is handled differently. It is crucial that experts remain in the expert pool and are ready for deployment whenever there is a need. An important cornerstone in **onboard-keeping** is the expert group: every member belongs to at least one expert group which is an important source for knowledge transfer, backstopping, peer-support and any kind of technical discussion or further training. SDC/HA offers regular meetings for exchange which strengthen the cohesion among the experts and are a key of success in onboard-keeping. The yearly symposium for humanitarian aid is another highly appreciated opportunity to meet each other and to connect to the latest developments in the department.

Offboarding does not take place in the classical way. At the end of their mission SHA-members undergo a systematic de-briefing with all involved staff at head office. The SHA-members remain in the pool as long as they are available and fit for mission. If there is a significant reorientation of the operational focus, the concerned expert group is screened and its members are informed about relevant changes.

V. Symposium findings

Summary

«Pilots, Passengers and Cabin Crew – How to reach Cloud 9?» was the title of the Symposium cinfo 2017. A short introduction to the subject of onboarding, onboard-keeping and offboarding was followed by a panel discussion about relevant onboarding practices in the private and public sectors with Tulu Hamidi (HR Marketing Manager Swisscom), Susanne Mehr (Research Fellow at the Chair of HR Management, University of Zurich) and Paolo Gallo (Chief Human Resources Officer, WEF). During four interactive workshops, participants went into further detail on various aspects of onboarding for different target groups: students in IC-relevant training courses (Maiden), newcomers (Design of Uniforms), middle management (Cessna) and staff who change assignments and postings (Frequent Flyers). In the afternoon, participants selected a topic and participated in sessions on the factors leading to increased retention and onboard-keeping: employee appreciation, autonomy and flexibility, personal development and team spirit.

Impressions of the day were captured in a mind map (see p. 27). Key findings of the workshops are presented below. The symposium, which was theoretically based on the onboarding-study, represents the starting point for further in-depth discussions in the Communities of Practice, which cinfo facilitates for its members.

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Members of Network cinfo
CHF 225.–

*at all levels of hierarchy



Panel

How can we identify the right candidates?

- Before creating a short list, call each candidate to understand their values and motivation.
- Job interviews are not a moment to show off but an opportunity for a sincere and open conversation among equals.
- Between the hiring decision and the first day engage actively with the employee. This builds relationships and clarifies mutual expectations (expectation management).

Maiden flight

How can universities prepare students for the IC labour market?

- Internships during studies (e.g. for thesis) should be seen as part of the onboarding process and are an initial opportunity for students to improve employability and engage with an employer.
- Collaboration between training institutions and NGOs provides opportunities for initial, supervised field experiences.
- Students should have a clearly defined research mandate and learning outcome, integrated into the implementation process.

What is the design of your uniforms?

How can you recruit the ideal staff for your organisation?

- Reflect on and use your gut feeling as part of the decision-making process.
- Consider group assessments to get a feeling of social skills in the problem-solving process.
- Talk about taboos: you can ask anything but explain the reason for the question.

Between Cessna and Concorde

How can you integrate new staff into middle/senior positions?

- Implement a mentor/buddy system, but focus on peers and avoid giving a new team member a higher-level employee as a buddy.
- Assess the value fit of the person you are potentially hiring as soon and as thoroughly as possible. It is the foundation for successful onboarding and onboard-keeping.
- Be aware that locals and expats might have different roles, expectations and exposure. Locals might rather 'marry' the organisation, while expats might prefer an 'affair'.

Frequent flyers

What is required in the case of multiple assignments?

- Ensure onboarding for each assignment, because each assignment is unique and has its own complexities.
- Identify factors that lead people to stay for a second assignment.
- Keep in touch with experts through platforms and events, even if they are not on an assignment. Create a marketplace for experts within the community.



Onboard-keeping

Employee appreciation

- Encourage confidence and allow failures to be part of a continuous learning process.
- Provide an informal culture for regular and continuous feedback throughout the year.
- Make your leadership values visible in everyday interactions. Consciously include your remote teams.

Personal development

- Opportunities for professional development are essential to successful onboard-keeping.
- These opportunities can be part of an institutionalised staff development framework or come by allowing staff time and making the budget available for individual development activities.
- While activities should serve personal development aspirations, they must also be aligned to institutional needs.

Team spirit

- Team spirit reflects organisational values and common goals, which are lived by team members.
- Team spirit has to grow naturally but can be enabled by authentic leadership, which owns the process.
- Introduce team building exercises and informal places for exchange and feedback (e.g. trophy, apéro, coffee dates)

Autonomy and flexibility

- Develop outcome/results-based performance criteria for flexible work and effectively monitor the same.
- Discuss the culture of trust at the top of the organisation to ensure a shift from control to trust. Change understanding of good leadership and management.
- Discuss the potential tipping point for a healthy balance between flexibility/autonomy and trust/control.
- Improve communication channels, enhance peer exchange and enable access to technologies that allow online work from any location.



Offboarding



40% of participants had a bad offboarding experience. Do not underestimate the benefits of good offboarding to the reputation of an organisation.

Glimpses from the symposium



«I find networking very important and it is one of the reasons why I join events like the cinfo Symposium. Networking should become part of the sessions, rather than being relegated to breaks.»



«I very much liked the mix of NGOs and the private sector (Swisscom), which could be further extended. It is helpful, interesting and supportive for both sides – the challenges we are facing are so similar (even though we sometimes think they are so different...).»

Almost all sessions were valued positively or very positively by 80 % and 95 % of participants.



«It would be nice to have some more experts coming to share their experiences, with more time for questions.»



Symposium 2019: 91% of the participants 2017 will join again!



«This was a focused and well-run event. I enjoyed it, many thanks!»

Thank you for your participation

VI. Next steps

This document is just the beginning of a shared journey and provides an overview of the ongoing debate and practices in the field of onboarding, onboard-keeping and offboarding in international cooperation. Intense discussions and exchanges between member organisations led to some initial recommendations, which can serve as inputs for further discussions and reflection within the Communities of Practice.

Some recommendations for member organisations:

- Use the matrix as a guide and draw action plans based on the gaps identified.
- Start using the employment life cycle, covering the process of onboarding, onboard-keeping and offboarding, as a basis for a HR strategy.
- Focus on how the values and mission of the organisation can be repeatedly shared within the organisation. Use existing online learning platforms and intensify or renew cross border communication flows. Identifying a brand ambassador for each country office may be useful.
- Be aware: the onboarding process already begins during recruitment.

To support the community, cinfo could facilitate the following actions:

- Together with cinfo members, identify next steps during the next meetings.

- Explore the benefits of an organisational concept of management as developed by DRC (called "Vision, values & standards"). It includes the overarching values compass, and within that, concrete standards for management and cooperation that enable the organisation to be very specific about how they 'live their values'.
- Help develop an online voluntary onboarding assessment and baseline checklists for organisations for all stages. The existing matrix can be further refined.
- Continue exchanging and documenting good practices over time and feed this back to working groups or Communities of Practice, which motivates organisations to emulate and systematically address their gaps.
- Develop a platform and act as a 3rd party to collect and analyse employee engagement surveys: provide baseline, comparative and organisation-specific data.
- Facilitate training of HR staff and managers in their responsibilities for onboarding, onboard-keeping and offboarding.
- cinfo's existing services can prove valuable as they touch upon many aspects that can increase the effectiveness of an organisation's onboarding, onboard-keeping and offboarding policies, for example the guided assessment of an individual's personal and professional situation.

Annexess

Questionnaire



Thank you for participating in this research. This document covers all the questions we will discuss with you during our interview. You may wish to review the questions in advance, or follow up after the interview to add additional information. Your responses will be entered into a database by the interviewer and used to produce two products:

1. An individual report on your organisation's practices and how they compare with the averages of cinfo members and global good practice; and
2. A report to be shared with all cinfo members and discussed at the Symposium on September 22.

Your individual organisation's information will be kept confidential and will not be shared with others or any results identified by name without your permission. We may ask your permission to include examples of your organisation's good practice in the final report. You will receive a copy of your organisation-specific report before the final comprehensive report is completed.

The questions cover three areas: basic information about your organisation (size, composition, etc.) so that more appropriate comparisons can be made; questions about the specific values or principles that drive your organisation's practice and mandate; and practices used for three stages of the employee life-cycle:

- onboarding (or integration),
- onboard-keeping (or engagement/retention) and
- offboarding (or exit).

These 60 practices are drawn from a literature and case-study review and represent a range of approaches, not all of which are suitable in every organisation. We also ask that your answers reflect practices that are actively followed: for example, your organisation may have a policy 'on paper' but if it is not consistently used, let us know.

Another issue we will explore in our interview is whether there are significant differences in how staff in HQ/Switzerland (also meaning permanent employees) and those in the field (including project/temporary staff) are managed in these processes. We'll also check to see if there are differences in terms of the type of employee: professional versus support staff.

Finally, we'll ask you to reflect on what your organisation's core values are, and how they are reflected and reinforced by these HR practices.

The interview should take about one hour. We thank you again for your time.

Interview questions: general

1. Name of organisation
2. Number and location(s) of head/main office, regions, other.
3. Main types of staff, and estimated number of each.

We're interested in the categories of staff who in your view are managed significantly differently in terms of onboarding, onboard-keeping and offboarding. If there are few significant differences, we'll just consider your organisation as a whole. However, if you have staff with very different types of work contract and treatment with respect to these processes, and this involves a significant number of your total staff, we'd like to explore that.

We'll start by establishing these categories, so please be prepared to describe these, to a maximum of 3. We'll call them A, B and C. Below we suggest some possible categories, in discussion we'll note the exact meaning you intend for each category. We'd also like a sense of the total number of staff and those in each category. Please focus on categories that include a large % of your staff – you may have special rules affecting for example 10% or fewer of staff, we'd be happy to hear about any key points in your processes for them but we don't need to complete the whole analysis for them.

Suggested breakdown:

- A. international / expatriate staff: who may be Swiss or other nationalities, who work in your head office or a regional/country office but could be posted to any location.
 - B. local staff: meaning those working locally in a national context outside Switzerland, not mobile across the organisation.
 - C. temporary staff (up to one year): temporary, limited contract terms.
4. What are the key values statements defining your organisation? Are these listed/available and can we have a copy?
 5. Are there other principles or practices your organisation adheres to?
 6. What is your organisation 'known for' (its brand)?

HR practice questions

We'll discuss three areas: onboarding, onboard-keeping (engagement/retention) and offboarding. For each area, there are a number of statements. Let us know if each statement describes your organisation's current practice. For example, you may have a policy or 'on paper' statement regarding a leadership development programme, but if it is not currently operating, we'll note that in the comments but not record it as an active practice. There are 20 statements in each of the 3 areas. Please answer for each major category of staff you would like us to consider, as determined above.

Onboarding

1.1 Completion of forms required for employment. A B C

1.2 Organisation has defined and consistently uses onboarding processes with responsibilities for all staff and timelines. A B C

1.3 Responsibilities for onboarding are integrated into performance requirements for managers, staff and new employees. A B C

1.4 Organisation has training or orientation for new staff on basic HR processes (pay, benefits, pensions, requirements). A B C

1.5 Effectiveness of onboarding is measured and analyzed. Improvements are part of organisation strategic plans. A B C

Comments

2.1 Employee receives copy of job description. A B C

2.2 Manager or other responsible person works with new employee to develop job plan for initial period. A B C

2.3 Manager and new employee's job plan for initial period includes specific onboarding goals and milestones, these are part of the probationary assessment. A B C

2.4 Manager provides information on organisation's overall strategic/operational plans and how employee job relates to it. A B C

2.5 Onboarding process is a period of continuing assessment regarding fit and appropriate further development needs. A B C

Comments

3.1 Employee is provided with staff lists and organisation charts. A B C

3.2 New employee has opportunities to participate in organisation activities before formal start date. A B C

3.3 New employee is assigned a mentor or 'buddy' to support them through their onboarding. A B C

3.4 Employee is introduced to co-workers and key contacts inside the organisation. A B C

3.5 Onboarding process includes and may also be available to outside partner organisations. A B C

Comments

4.1 Employee is provided with information about organisation values, mission, etc. A B C

4.2 Organisation does specific training or orientation for new staff on organisation values and 'ways of working'. A B C

4.3 Organisation values are explicitly linked to employee actions and performance: integrated into performance plans and assessments. A B C

4.4 Onboarding process includes opportunities to work with and be observed by peers and to receive feedback and support. A B C

4.5 Onboarding process explicitly models expected behaviours, ways of working and values of the organisation. A B C

Comments

Is there anything you feel your organisation does particularly well in this general area? (Onboarding)

Are there differences between the processes for professional and administrative / support staff?

Onboard-keeping

1.1 Organisation tracks retention / turnover rates.
 A B C

1.2 Organisation sets compensation rates that are fair and appropriate for the requirements.
 A B C

1.3 Organisation establishes compensation and working conditions policies in a transparent way and with the input or participation of staff.
 A B C

1.4 Organisation provides working conditions (including safety and security) that are fair and appropriate.
 A B C

1.5 Organisation regularly surveys staff working conditions and compensation in terms of employee satisfaction and in relation to comparator organisations.
 A B C

Comments

2.1 Organisation requires regular review of employee job performance.
 A B C

2.2 Organisation has 'employee engagement' policy or objectives.
 A B C

2.3 Organisation undertakes regular assessments of employee engagement, reports on the findings and takes action to address gaps.
 A B C

2.4 Employee performance assessment is integrated into overall organisational reporting and progress reporting.
 A B C

2.5 Management performance assessments are based on HR/leadership metrics as well as organisational goals.
 A B C

Comments

3.1 Organisation has and actively uses intranet or other means of internal communication for staff.
 A B C

3.2 Organisation has regular forums for 'all staff' meetings and discussions.
 A B C

3.3 Organisation offers opportunities for staff exchanges / work in and with other areas of the organisation.
 A B C

3.4 Organisation has structured process to reinforce and connect employees with the values/ purpose of the organisation*
 A B C

3.5 Organisation regularly assesses employee engagement with organisation values and mission, and takes steps to address gaps.
 A B C

Comments

4.1 Organisation has process for receiving and addressing employee questions and complaints.
 A B C

4.2 Organisation allocates resources for staff development.
 A B C

4.3 Organisation has a transparent process for setting organisational policy and includes input or participation of staff in this.
 A B C

4.4 Organisation has defined its culture and 'ways of working' in concrete, operational terms.
 A B C

4.5 Organisation has and uses career and leadership development programme(s) aligned with organisational values.
 A B C

Comments

Is there anything you feel your organisation does particularly well in this general area? (Engagement)

Are there differences between the processes for professional and administrative / support staff?

* For example in faith based organisations, regular devotional meetings. In other organisations, opportunities to reflect on the organisation's values as they connect to personal values or interests.

Offboarding

1.1 Completion of forms required for separation.
 A B C

1.2 Organisation has a defined offboarding process.
 A B C

1.3 Organisation regularly assesses turnover data and the impacts of this to identify areas for strategic attention (e.g. improvements in onboarding and engagement).
 A B C

1.4 Organisation provides standard documentation of employment record on request.
 A B C

1.5 Organisation works with others in the same sector to develop and implement policies for staff movement between organisations to minimize costs.
 A B C

Comments

2.1 Any post-employment rules are defined and shared (e.g. post employment contracting).
 A B C

2.2 Organisation has a defined 'knowledge transfer' policy/process to ensure handover of key expertise.
 A B C

2.3 Organisation provides for 'apprenticeship' or mentoring process leading up to employee departure for successors.
 A B C

2.4 Organisation has explicit policies regarding periods of notice and requirements for transition that respect both employee and organisational needs.
 A B C

2.5 Organisation provides for 'post-employment' relationships (e.g. to reflect needs for follow up questions, etc.).
 A B C

Comments

3.1 Organisation recognizes past service with the organisation in future employment.
 A B C

3.2 Organisation maintains a 'roster' of past and pre-screened employees for rapid recruitment and deployment.
 A B C

3.3 Organisation follows up with short-term (project) employees after contract completion to collect feedback on the project, areas to improve, etc. Data is analyzed and used in improvements.
 A B C

3.4 Organisation creates opportunities for existing staff to learn from departing employee - more general issues than job-specific.
 A B C

3.5 Organisation maintains an active 'alumni' network through means such as dedicated website or page, hosting meetings, etc.
 A B C

Comments

4.1 Organisation provides opportunities for exit interviews.
 A B C

4.2 Organisation sees former employees as potential ongoing advocates for the organisation and its mission and takes steps to reinforce this.
 A B C

4.3 Exit processes include an easy to complete exit feedback form, with data rolled up and reported on regularly as an organisational tool.
 A B C

4.4 Organisation's profile on social media and rating sites is monitored to track reputation/ brand issues.
 A B C

4.5 Organisation takes active steps to manage how organisation is reflected in social media, on rating sites, etc.
 A B C

Comments

Is there anything you feel your organisation does particularly well in this general area? (Offboarding)

Are there differences between the processes for professional and administrative / support staff?

Final questions

7. May we have copies of/links to any policies, guides, etc. for onboarding, engagement and offboarding?
8. What are the ways that your organisation most reflects its core values in the way that it works and manages staff?
9. Are there differences in how staff at 'HQ' and in the field understand/express the values of the organisation? What does the organisation do about this?
10. What is one thing you think your organisation could do better in terms of reinforcing its values among staff?
11. What do you think are the greatest challenges your organisation faces in maintaining your reputation/brand/identity?
12. Any final thoughts before we conclude?

Thank you for your time! Your input will be used to prepare a short report back to you with assessment results that will describe how your organisation is performing in these three areas and compare this with the practices of others. Aggregated results will be presented to the cinfo Symposium in September, and will form the basis of useful discussions there and subsequently.

Building the Matrix Response Averages for each organisation

cinfo conducted interviews with 15 member organisations, working with them to assess their organisation's practices against the matrix. In each of the 3 stages there was a maximum score of 20, if each practice was fully and consistently implemented within the organisation. Scores for basic, average and advanced were calculated on the following basis:

| | |
|-------|----------|
| 15-20 | Advanced |
| 6-14 | Active |
| 1-5 | Basic |

We also worked with organisations to identify major employee groups: those whose experience in each area would be notably different, and who made up a significant proportion of the overall number of employees. For summary purposes we've combined these into two major types of employees:

1. Swiss nationals or expatriates, who may be working in Switzerland or overseas, under Swiss law or contracts, whose contracts may be unlimited or time specific, who may be mobile or not. This group includes both professional and support staff.
2. Employees hired under local laws outside Switzerland, generally nationals of the country in which they work, generally non-mobile.

This distinction captures the majority of the differences between employee experiences although the specifics for each organisation will of course vary considerably. However, for the purposes of discussion the distinction is useful. Broadly speaking, organisations have a higher level of practice with respect to the first group of employees. In many cases HR management is delegated to local or regional offices for national staff and the organisation may not have detailed knowledge of or control over practice. For some organisations, this was an issue that they were working to address, seeking greater consistency across their whole organisation.

| | | Advanced | | Active | | Basic | |
|------------|--|--|--|--|--|--|-----|
| | | 1. Swiss law, Swiss or expats who are mobile, time specific and unlimited contract types. | | 1. Swiss law, Swiss or expats who are mobile, time specific and unlimited contract types. | | 2. Hired under local law, outside Switzerland, non-mobile, national staff. | |
| Onboarding | | 3.2 | | 3.2 | | 3.0 | |
| Compliance | Completion of forms required for employment. | Responsibilities for onboarding are integrated into performance requirements for managers, staff and new employees. | Effectiveness of onboarding is measured and analysed. Improvements are part of organisational strategic plans. | Manager and new employee's job plan for initial period includes specific onboarding goals and milestones, which are part of the probationary assessment. | Onboarding process is a period of continuing assessment of fit and appropriate developmental needs. | 12.0 | 7.8 |
| | Employee receives copy of job description. | Organisation has defined and consistently uses onboarding processes with responsibilities for all staff and timelines. | Organisation has training or orientation for new staff on basic HR processes (e.g. pay, benefits, pensions, requirements). | Manager or other responsible person works with new employee to develop job plan for initial period. | Manager provides information on organisation's overall strategic/operational plans and how employee job relates to it. | | |
| Connection | Employee is provided with staff lists and organisational charts. | New employee has opportunities to participate in organisational activities before formal start date. | Employee is introduced to co-workers and key contacts inside the organisation. | New employee is assigned a mentor or 'buddy' to support them through their onboarding. | Onboarding process includes, and may also be available to, outside partner organisations. | | |
| Culture | Employee is provided with information about organisational values, mission, etc. | Organisation conducts specific training or orientation for new staff on organisational values and ways of working. | Onboarding process includes opportunities to work with and be observed by peers and to receive feedback and support. | Organisational values are explicitly linked to employee actions and performance, and integrated into performance plans and assessments. | Onboarding process explicitly models expected behaviours, ways of working and values of the organisation. | | |
| | | | | | | 2.6 | 1.5 |

| Basic | | Advanced | | 1. Swiss law, Swiss or expats who are mobile, time specific and unlimited contract types. | 2. Hired under local law, outside Switzerland, non-mobile, national staff. |
|------------------------|---|--|-----|---|--|
| Onboard-keeping | | | | | |
| Compliance | Organisation tracks retention / turnover rates. | Organisation sets compensation rates that are fair and appropriate for the requirements. | 3.8 | 12.3 | 2.6 |
| | Organisation requires regular review of employee job performance. | Organisation provides working conditions (including safety and security) that are fair and appropriate. | 2.4 | | 1.6 |
| Clarification | Organisation has and actively uses intranet or other means of internal communication for staff. | Organisation has an employee engagement policy or objectives. | 3.1 | 12.3 | 1.8 |
| | Organisation has a process for receiving and addressing employee questions and complaints. | Employee performance assessment is integrated into overall organisational reporting and progress reporting. | | | |
| Connection | Organisation has regular forums for general staff meetings and discussions. | Organisation has regular forums for general staff meetings and discussions. | 3.1 | 12.3 | 1.8 |
| | Organisation has a structured process to reinforce and connect employees with the values / purpose of the organisation. | Organisation offers opportunities for staff exchanges / work in and with other areas of the organisation. | | | |
| Culture | Organisation allocates resources for staff development. | Organisation has defined its culture and ways of working in concrete, operational terms. | 3.0 | 12.3 | 2.2 |
| | Organisation has a transparent process for setting organisational policy that includes staff input or participation. | Organisation regularly assesses employee engagement with organisational values and mission, and takes steps to address gaps. | | | |

| Basic | | Advanced | | 1. Swiss law, Swiss or expats who are mobile, time specific and unlimited contract types. | 2. Hired under local law, outside Switzerland, non-mobile, national staff. |
|----------------------|---|--|-----|---|--|
| Offboarding | | | | | |
| Compliance | Organisation has a defined offboarding process. | Organisation regularly assesses turnover data and impact to identify areas for strategic attention (e.g. improvements in onboarding and engagement). | 3.3 | 10.6 | 2.7 |
| | Completion of forms required for separation. | Organisation provides standard documentation of employment record on request. | | | 1.7 |
| Clarification | Organisation has a defined knowledge transfer policy / process to ensure handover of key expertise. | Organisation provides for apprenticeship or mentoring process for successors leading up to employee departure. | 1.7 | 10.6 | 1.3 |
| | Any post-employment rules are defined and shared (e.g. post employment contracting). | Organisation provides for 'post-employment' relationships (e.g. to reflect needs for follow up questions, etc.). | | | |
| Connection | Organisation maintains a roster of past and pre-screened employees for rapid recruitment and deployment. | Organisation follows up with short-term (project) employees after contract completion to collect feedback on the project, areas to improve, etc. Data is analysed and used for improvements. | 1.8 | 10.6 | 0.8 |
| | Organisation creates opportunities for existing staff to learn from departing employees, emphasising general rather than job-specific issues. | Organisation maintains an active 'alumni' network through means such as dedicated website or page, hosting meetings, etc. | | | |
| Culture | Organisation sees former employees as potential ongoing advocates for the organisation and its mission, and takes steps to reinforce this. | Exit processes include an easy-to-complete exit feedback form, with data collated and reported on regularly as an organisational tool. | 3.8 | 10.6 | 2.3 |
| | Organisation provides opportunities for exit interviews. | Organisation takes active steps to manage how the organisation is reflected in social media, on rating sites, etc. | | | |

HAFL – process for students’ deployment abroad

| Time | What | Who |
|----------------------------------|--|--|
| May/June | Interviews: identify motivation, personal and professional background, etc. | Students with coordinator |
| June | E-mail to network (“we have students that are looking for internships”) | Coordinator to network (organisations and individuals) |
| Until end of August | Interested organisations/people contact HAFL, make a proposition (→ ca. 30) | Organisations to coordinator |
| | Internal discussion and final list (→ ca. 20-25); proposition to students | Coordinator with supervisors at HAFL |
| October | <ul style="list-style-type: none"> Based on the previous interviews HAFL makes an optional proposition Students make first and second choice In case of doubts another conversation takes place | <ul style="list-style-type: none"> Coordinator Students Students and Coordinator, evtl. supervisor |
| End of October | Communication of final choice to network, including CV of the selected student | Coordinator to network (organisations and individuals) |
| | Student and organisation meet, have interviews, etc. | Students, organisations |
| December, January, February | Development of contract and terms of reference | Mainly students and organisations; also coordinator, evtl. supervisor |
| | Some organisations send documents for preparation (ex. GIZ), some do not (mostly smaller NGOs) | Organisations to students |
| Ca. April/May | Students leave for internship | Students |
| During internship | Close supervision by organisation and HAFL, HAFL-supervisor visits students, constant exchange | All |
| Ca. October/November | Students return to Switzerland | Students |
| October/November | Synthesis weeks: <ol style="list-style-type: none"> Short presentation by each student including anything they want to share (to land, cultural shock at home) Thematic, “technical” presentation | <ol style="list-style-type: none"> Students, coordinator, supervisor, head of department As above, plus open to other students (e.g. from other disciplines) |
| Ca. 6 weeks | Time for bachelor thesis | Students |
| 1 st week of December | Submission of Bachelor theses | Students |
| December | Second and third “synthesis weeks”: different tasks, mainly technical | Students, lecturers |
| January | Oral exam Bachelor thesis | Students, supervisor |
| After oral exam | Revision of thesis, send thesis with thank-you letter to host organisations | Students with supervisor to organisations |
| | Debriefing in Switzerland or via Skype | Organisations, students, evtl. supervisor |
| | In case of severe/uncommon difficulties another meeting (without students!) | Coordinator, organisations |
| | Annual meeting with partner organisation (with frame contracts) where this point of collaboration is also discussed | Coordinator, partner-organisation |

Nadel – process for students’ deployment abroad

| Time | What | Who |
|-----------------------------|---|--|
| Beginning of June 2018 | Selected students fill a form (s. attachment; depending on wish destination in English, French, Spanish) where (region, kind of organisation) and what they want to do and why. Possibility to bring own propositions. Return of completed form. | Students |
| Until end of June | | |
| Beginning of July | E-mail to network (partner organisations) with forms of all students; distribution to all project leaders. | Coordinator to network (organisations) |
| Until mid of September | Interested organisations/people/projects contact NADEL, make a/ several proposition(s). Only proposal of one student per project is allowed, but organisation can make as many requests as they want (if they have 20 projects that fit 20 different students, they can fit each of the students to one of the projects). | Organisations to coordinator |
| End of September | Distribution of propositions to all students at the same time (average 3 propositions/ student) | Coordinator to students |
| | Upon request counselling of student | Coordinator and students |
| Until beginning of November | Final decision of the student | Students |
| During the semester | Contact with project; exchange of documents; sometimes invitation to HQ and introduction; presentation of first specification sheet (organisations) | Students and organisations |
| 8-10 months | Mission | |
| During mission | Supervision mainly through host organisation, coaching with NADEL upon request | All |
| After | De-briefings, evaluation | All |

Case studies

Seven case studies were conducted with four non-Swiss INGOs and three individuals working in an INGO. Interviews focused on organisational practices for onboarding, onboard-keeping/engagement, offboarding and organisational values. A brief abstract of points particularly relevant to this paper from the four organisational studies is presented below.

Organisations contacted for this study: Danish Refugee Council, Habitat for Humanity International, World Vision (Japan), Cuso International.

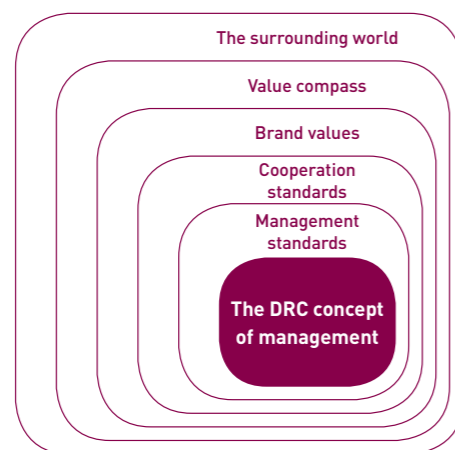
Danish Refugee Council (DRC)

The Danish Refugee Council (DRC) is a humanitarian, non-governmental organisation founded in 1956 that works in more than 30 countries throughout the world. DRC provides direct assistance to conflict-affected populations – refugees, internally displaced people (IDPs) and host communities in conflict areas around the world and advocates on behalf of conflict-affected populations internationally, and in Denmark, on the basis of humanitarian principles and the Human Rights Declaration. DRC has grown substantially in the last decade and now has over 6,000 staff, of whom 1,000 are in Denmark. Overall less than 3% of staff outside of Denmark are Danish. Recognising the need to more clearly articulate the values and culture of the organisation and to institute HR and management practices that reflect these, the DRC developed a document called “Vision, values & standards” in 2009 which is to be updated and which includes an overarching values compass, and within that, concrete standards for management and cooperation that enable the organisation to be more specific about how they ‘live their values’. Their website and documentation spell these out clearly¹:

The DRC has also articulated its brand identity, stating that the three core values of the DRC brand are:

- Enthusiasm: We are committed to the people we are here to help
- Perseverance: We have the will to dig in, where others might give up
- Decency: We behave properly, to always be able to look ourselves and others straight in the face.

We want the world around us to associate DRC with these three values.



Onboarding

DRC has a global ‘induction programme’ which runs four times per year in addition to regional and national inductions. This was designed for the period when the organisation recruited about 100 expatriates annually. Now there are in total close to 2,000 new recruits per year, mostly outside Denmark. With staff in 40 countries, a decentralised management structure and limited HR capacity, both at HQ and especially in the field, the process of onboarding is being revamped to ensure there is greater consistency in both content and process. DRC has developed role statements for the different responsibilities (manager, HR, etc.), standard content and milestones (Day 1, week 1, etc.) for onboarding, and is developing the human and technological infrastructure to manage this.

Engagement / onboard-keeping

DRC conducts an engagement survey every three years, although this currently only involves staff based in Denmark. The results of the survey are generally taken seriously within the organisation. Results are responded to with action plans and initiatives to improve engagement. If this active approach to engagement and the low turnover rate of staff based in Denmark, relative to the organisation as a whole, correlates needs to be explored.

Offboarding

Starting in June 2016 an online ‘exit form’ was introduced. This has provided a significant new source of information. Previously, exit interviews were available but individual managers rarely reported on any issues which arose and there was no systematic data collection. The new form allows departing staff to request individual follow up from an HR staff member. The data to date (after only 6 months) has already been very helpful in identifying issues and trends.

A dashboard of key data from the exit forms is available to all staff members on the intranet site. The form also includes a link to the website Glassdoor² which has led to a dramatic increase in the number of reviews of DRC on the site, and of its positive rating³.

² <https://fr.glassdoor.ch/Avis/index.htm>

³ <https://fr.glassdoor.ch/Avis/Danish-Refugee-Council-Avis-E547080.htm>

Habitat for Humanity International

HFHI, or Habitat, is a large INGO founded in 1976. Headquartered in Georgia, USA, it has three area offices, national branch offices and national affiliates. While it is a Christian-based organisation, it is explicitly non-proselytising and seeks to work with persons of any and no faith. Their website⁴ lists their mission, vision and principles: “Our mission: Seeking to put God’s love into action. Habitat for Humanity brings people together to build homes, communities and hope.”

Onboarding

There is a standard onboarding programme which was jointly developed by the HQ and area offices. HFHI staff includes international/expatriate and national staff in local offices. A very condensed onboarding process is used for staff hired for disaster/emergency work, with the emphasis placed on a rigorous reference process before they are hired, onboarding briefings specific to the disaster response project (country orientation, security/safety and HFHI values), and maintaining a roster of people who have previously worked for HFHI in this capacity, so that they can be quickly drawn on in need.

For regular staff the onboarding process has 3 main elements:

- Compliance issues including documentation, enrolling in benefits programmes, payroll, etc. and review and sign off on key HR policies, IT access and the like.
- Organisational familiarisation, including the history of the organisation, its major strategies, the roles of the different offices and departments, and the three global areas.
- Cultural orientation: for the US office this is conducted every 3 months by the organisation’s chaplain. For area offices, this covers both the organisational culture of HFHI and norms specific to the country in which the staff member is working.

The approach to onboarding and specific content is designed to emphasise HFHI’s values and expected ways of working: collaborative, team-oriented, open communication and a shared identity. An underlying theme is the role of each part of the organisation to the overall objectives.

Engagement / onboard-keeping

The aim of HFHI is to build and reinforce a culture that is collaborative, shares information and celebrates accomplishments, with verifiable reporting and measures. Every six months the whole organisation comes together (in-person and virtually) for an hour-long ‘community meeting’ which provides updates and recognises achievements and anniversaries. This is part of an active internal communications strategy aimed at building a cohesive sense of community across the whole organisation, fostering the exchange of information on accomplishments and activities at every level.

To retain valued staff, HFHI offers many opportunities for career development, encouraging staff to rotate to different offices and roles. National office staff can be promoted to staff positions in other country offices. HFHI is developing a succession planning and leadership development programme, including designing tools and processes and securing a budget for these activities.

Offboarding

HFHI sees its current and past staff members as part of the ‘Habitat family’. HFHI wants and expects its former staff to remain connected, to act as advocates for HFHI and its mission, and to consider re-employment in the future if appropriate. There are some technical rules regarding post-employment relationships: in the USA a former employee may not be contracted within 6 months of their departure with the same organisation. However, the organisation as a whole values the knowledge of its past staff and will continue to work with them. The Disaster Response staff database is a formal expression of this, while other ways of ongoing connection are less formalised (for example, there is no explicit ‘alumni’ group supported by HFHI).

World Vision (Japan)

World Vision is a Christian relief, development and advocacy organisation dedicated to working with children, families and communities to overcome poverty and injustice. Inspired by Christian values, World Vision works with the world’s most vulnerable people, serving all regardless of religion, race, ethnicity or gender.⁵

Onboarding

In Japan it is customary for organisations to bring on new staff annually in April and to do onboard/orientation training for the group. World Vision is small and hires as vacancies arise, but works to ensure that new employees are trained together in

⁵ World Vision Japan website <https://www.worldvision.jp/info/e-about-wvj.html>

small groups as enough come on. Initial training normally takes five days with sessions including core values, culture, basic HR administration, and briefings from each department. The new hires then receive further orientation and training from their own department and supervisor. In addition, there is a follow-up session a year after recruitment, which is also a week long.

Engagement / onboard-keeping

The contact interviewed for World Vision stated that the alignment between her own values and those of the organisation, and the degree to which the organisation works consistently with those values is a strong factor for remaining with World Vision. She observed that the organisation “doesn’t just talk about core values – but does real, village-based work with the poorest, really living our Christian values and practice.” As a small organisation with limited resources, World Vision does not have the capacity to offer a wide range of motivators: there are limited options for career growth; salaries are relatively low compared with those for people with comparable skills and experience in other NGOs and private sector organisations; and other benefits such as pensions are limited.⁶ On the other hand, she has been encouraged to pursue learning in areas that interest her and to have freedom of action commensurate with her experience. But there is a tension between objective ‘working conditions’ and how they compare across organisations doing similar work and the values-driven work ethos. Staff may feel expected to do additional work voluntarily as an expression of their Christian values, for example.

Offboarding

There are standard administrative processes regarding taxes, pensions, IT closure, etc., but this is not a high-profile area. Any ‘exit interview’ would be informal and up to an individual manager.

Cuso International

Cuso International⁷ has operated since 1961, initially as a volunteer placement service for Canadian University students, now working internationally to facilitate a range of volunteer opportunities, including south-south placements. In 2017 Cuso International will place approximately 400 volunteers in overseas placements. They have a clear set of values which inform what they do and how they work:

- **Partnership:** they believe in the power of people. They employ a people-centred approach to development and the challenge of overcoming poverty and inequality. They support their partners by allowing them to drive their own development. They recognise that everyone has a stake in effective development, and seek to build on existing capabilities.
- **Respect and integrity:** they value diversity and recognize and care about the rights and dignity of others. They strive to live up to their commitments, to be fair and transparent in their work, and to act consistently in applying their principles.
- **Accountability:** They take responsibility for their actions and proactively demonstrate that they work with and on behalf of others. They perform consistently to standards and seek to achieve and inspire excellence. They are dedicated to continually drawing from their experience, sharing knowledge and applying it to improve their work.

Recruiting, assessing, selecting, placing and supporting volunteers to be effective is Cuso International’s core business, hence it is appropriate that they have a very well-developed approach to this. They describe this as “The Volunteer Journey” and are very explicit with staff and volunteers about all stages and the expectations of the organisation and volunteers at each stage.

Onboarding for volunteers

1. The first stage is an online application. The majority of unsuccessful applicants are weeded out at this stage because they do not possess the amount of work experience or educational background requested by overseas partners.
2. Preliminary phone interview: explaining the terms and conditions of service and beginning to explore the applicant’s motivations for working overseas. Just under half of all shortlisted applicants will not move on from this stage.
3. In-person assessment day. In one of 2 regional centres, this day uses an Assessment Centre methodology with a mix of interviews, group work and activities designed to explore the ‘6 dimensions’ – descriptors that cover both competencies and values required for Cuso volunteers. The six dimensions listed below include sub-competencies in each area (the first as a sample):

- Positive, realistic commitment
 - Commitment to Cuso
 - Principles of volunteerism
 - Professional commitment
 - Awareness of likely realities
- Commitment to learning
- Flexibility and adaptability

- Self-assurance
- Working with others
- Sensitivity to the needs of others

Assessment is done by community assessors, a mix of former volunteers and others who have been trained for the role. Assessment days typically involve six applicants and three assessors. Applicants must pay part of the costs to attend the assessment days. About 90% of applicants are successful at this stage.

4. Reference check and partner review. Following a reference check by Cuso the applicant is offered to the developing country partner, who may choose to do a further review or distance interview. Applicants who pass this stage are referred to training.
5. SKWID is a five day residential training programme required for all volunteers. It stands for Skills and Knowledge for Working In Development. The programme covers values, ways of working, and practice tips. It is a very practical, focused training emphasising “how Cuso does development” to ensure a common base of knowledge and practice. Volunteers are observed during this stage and potential issues identified: for example, if a volunteer contravenes Cuso expectations by expressing sexist, racist or homophobic views, or shows difficulty meeting required capacities for flexibility and adaptability. Volunteers are advised in advance that Cuso practices “continuing assessment” and that a selection decision may be revisited at any point. Where a problem arises, the volunteer is notified and asked to change their behaviour. If the behaviour does not change, a formal ‘selection review’ process is triggered, which may lead to a conditional placement or ending the relationship. Placement in-country usually happens within a month of SKWID training.
6. In-country orientation is done by the local Cuso office, which has a mix of national and international staff, and by the partner organisation where the volunteer is placed.

At every stage there is extensive documentation and opportunities for feedback. In addition, the process of continuing assessment continues throughout the overseas assignment period, supported by documentation and discussions.

Cuso also aims to model its values and working practices at every stage during the process, ensuring coherence between their stated values and their actual working practice. For example, an element of the assessment day is a task requiring applicants to complete a statement of reflections on the day: what they learned about the organisation and themselves, what they would do differently if they started the day again, and what they personally contributed to the day. This models Cuso’s value of a reflective learning practice.

Offboarding for volunteers

Cuso has an equally well-developed process for returning volunteers, called “Reintegration on Return”, which is intended to support both the learning and future activities of the volunteers and organisational learning for Cuso. There are three main stages:

1. Exit interviews and processes in-country, with partner organisation and Cuso country office.
2. Debriefing and exit interview with Cuso on return to Canada.
3. ‘Reintegration weekends’; 2-day sessions held 5-6 times per year in Ottawa to support volunteers to re-integrate, reconnect to Cuso and to Canada.

Cuso maintains active networks of former volunteers (‘Alumni’) and seeks to involve them in many aspects of its work as on-going volunteers in other roles, and as promoters, etc.

Cuso’s organisational learning uses a combination of ongoing reporting during placements (part Cuso’s M&E process), exit interviews conducted at the country offices, and feedback sessions held at the reintegration sessions. Information is collated and analyzed on a continuous basis. There is a formal survey process for volunteers; the first one is sent four months after the start of a placement and a final one three months after return. The instrument is being refined to reduce the number of questions and improve response rates.

Staff processes

Over the past decade there have been separate HR processes for staff and volunteers, with no overarching coordination. Staff processes therefore differ in some ways from those for volunteers. For example, a set of competencies for staff has recently been developed as part of the annual review process, but these are neither aligned with the ‘dimensions’ used for volunteers, nor yet fully integrated into job descriptions and selection criteria. Cuso has staff in HQ and overseas offices, international and national. A common set of tools and checklists for each process are available but there may be variations in how they are used depending on the individual manager. However, all staff positions related to volunteers are required to complete some elements of the volunteer training process (SKWID).

⁶ Note that in Japan the NGO sector is still largely considered ‘voluntary work’ and many organisations do not pay an employment wage. WV does, probably at a national average level per age but lower than salaries for commensurate experience in non-NGO organisations.

⁷ <http://www.cusointernational.org/about/about>

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Rue Centrale 115
2503 Bienne, Switzerland
+41 32 365 80 02
info@cinfo.ch | www.cinfo.ch