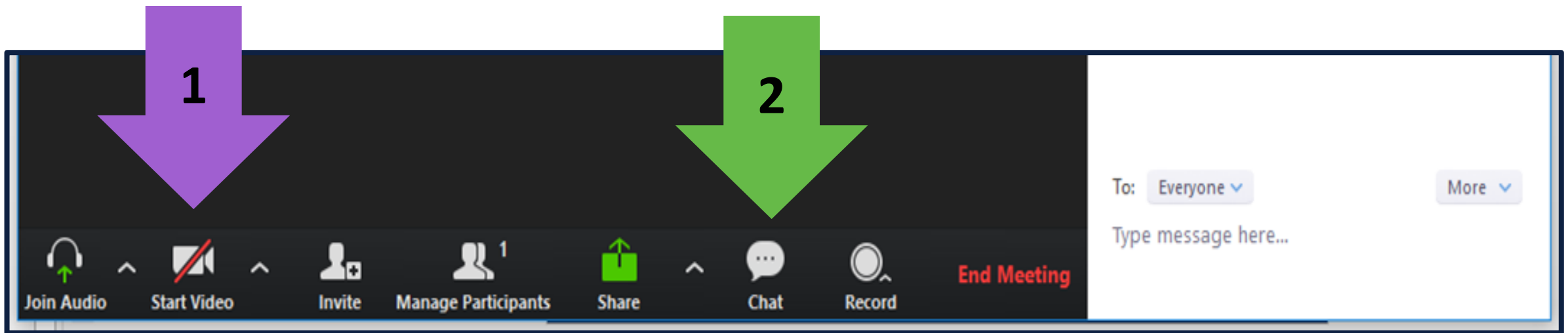


Testing Zoom Functions

1. Please turn on your video, if at all possible 😊
2. Chat to Everyone: One word to describe how are you feeling today





Best Practices in Virtual Onboarding

May 2020

Outcomes

- Access tools and resources related to effective virtual onboarding
- Discuss questions and best practices with other talent leaders



Agenda

- Norms and Community Building
- Effective Virtual Onboarding Strategies
- Participant Q&A
- Next Steps and Close



Introduction

Mary Mason Boaz

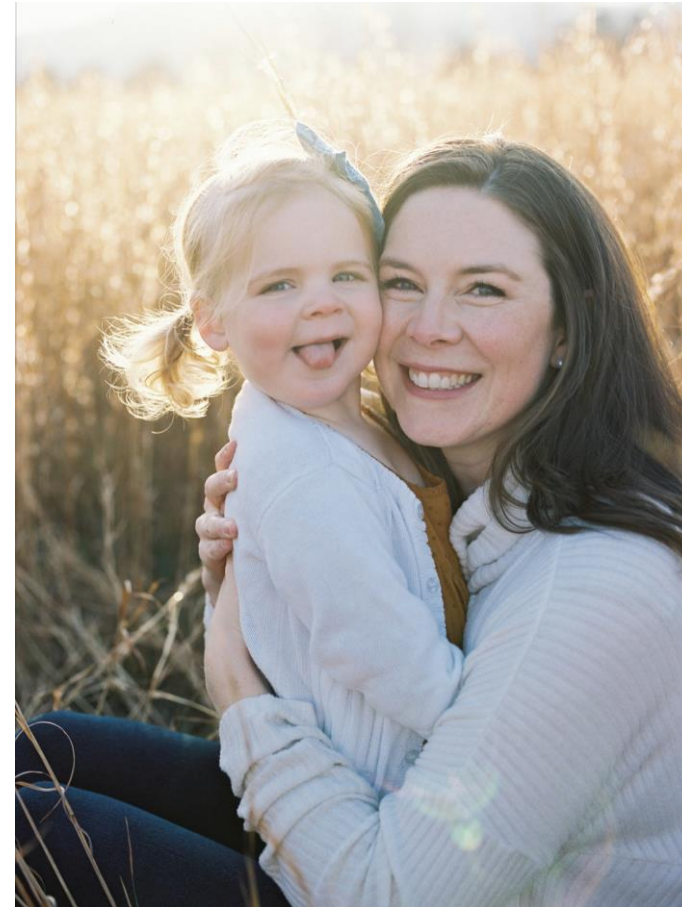
Partner, EdFuel

She/her/hers

Lexington, VA

2.5 yr old daughter, Nan + baby due in June

Self Care: Bravo TV shows



Webinar Norms

- Stay engaged
- Community mindset
- Speak your truth
- Experience discomfort
- Expect and accept nonclosure
- Be mindful of air time

Virtual Norms

- Be on video, if possible
- Use the chat!
- Warm calling
- Jump in with questions
- Mute, but unmute for verbal responses



Webinar Safety

Your safety and the safety of our community is our number one priority.

Precautions We've Taken:

- Enabled a waiting room
- Muted all participants upon entry
- Limited screen sharing to host only
- Deactivated several settings
- Prepped on how to remove participants

In the Event of an Active In-Meeting Incident

- Put all participants on “hold” and do our best to remove the disturbance
- If needed, end the meeting and follow up immediately with a notification re: the incident and next steps for rescheduling



Community Building

CHAT
NOW

- Name
- School/Organization
- What is one of your self-care activities?



Agenda

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Poll: Rate Yourself – Onboarding Edition!

Rate your organization as it relates to onboarding:

1. In development
2. Exists but not strategic
3. Exists and strategic, but not implemented with fidelity
4. Exists, strategic, and implemented with fidelity



In the chat:
What is most top of mind for you as it relates to making onboarding “virtual”?



Onboarding Defined

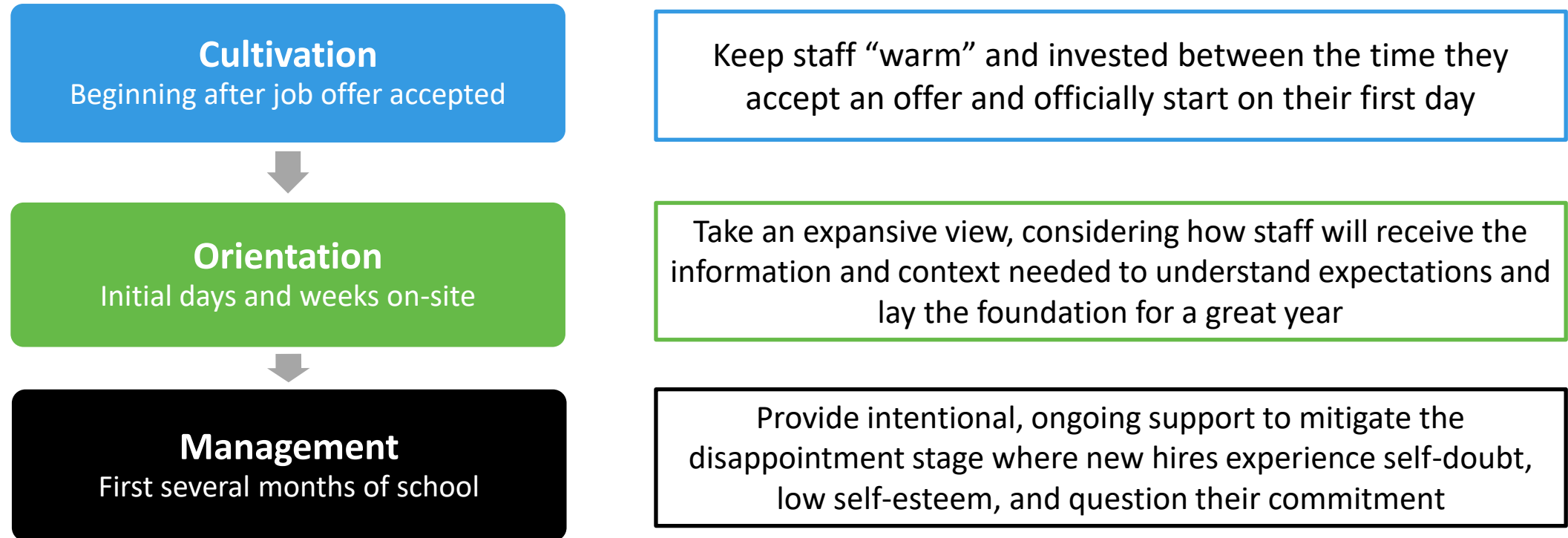
Put simply, onboarding is the process of helping new hires adjust to the social and performance aspects of their new job quickly and smoothly.

Onboarding is a magic moment when new employees decide to stay engaged or become disengaged. It offers an imprinting window when you can make an impression that stays with new employees for the duration of their careers.

*Amy Robinson,
Principal of The Interchange Group*



The Phases of Onboarding



Making the Case for Strong Onboarding

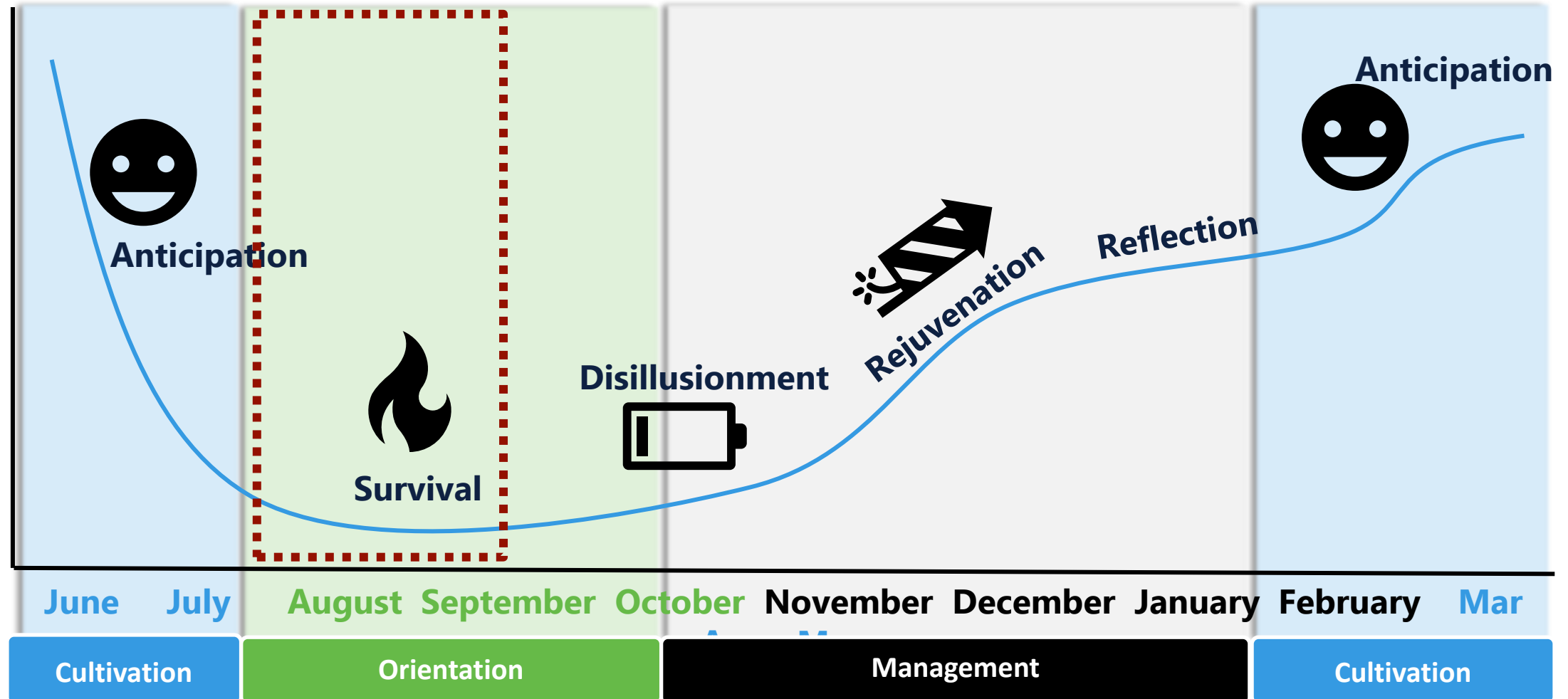
“As high as **20 percent** of **staff turnover** can happen within the **first 45 days** of employment.”

“It can cost an organization **six to nine months** of an **employee's salary** to identify and onboard a replacement.”

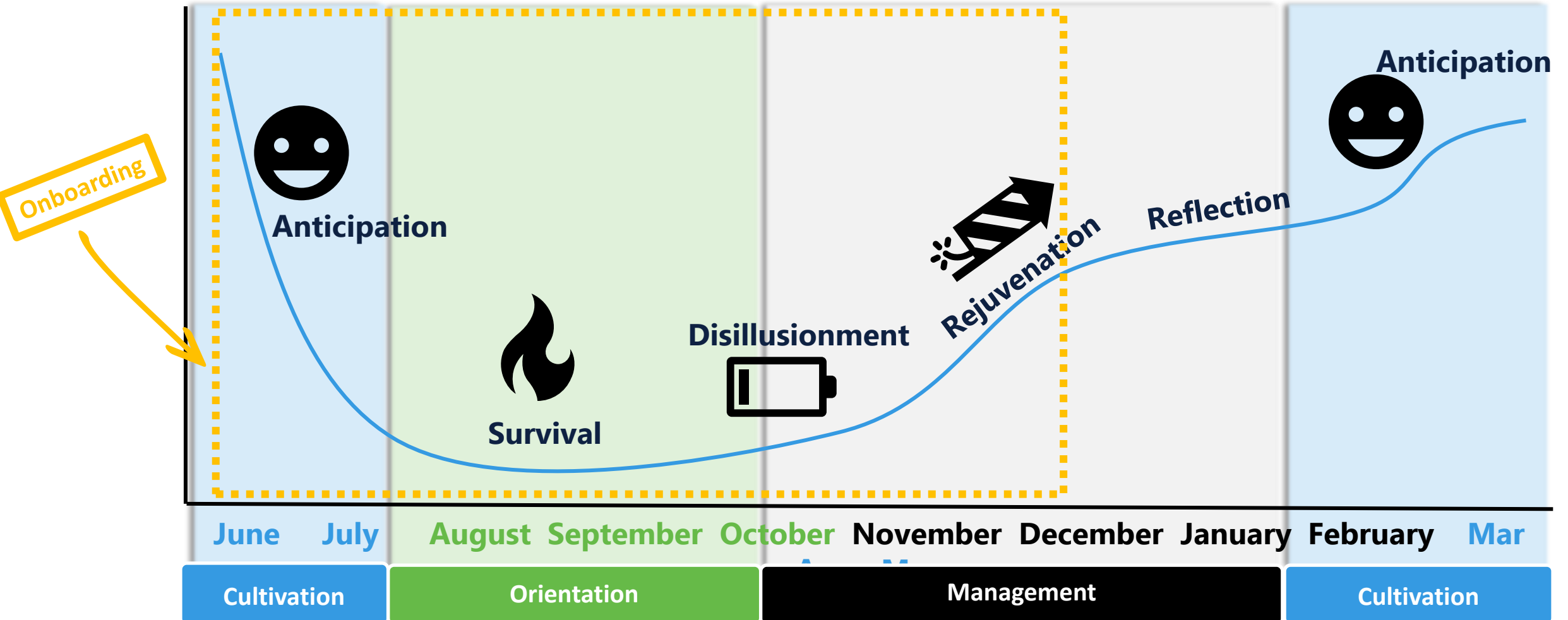
“**62 percent** say primary goal with onboarding is to integrate employees with the workplace **culture**, however it accounts for just **27 percent** of the **onboarding process**.”



Making the Case for Strong Onboarding

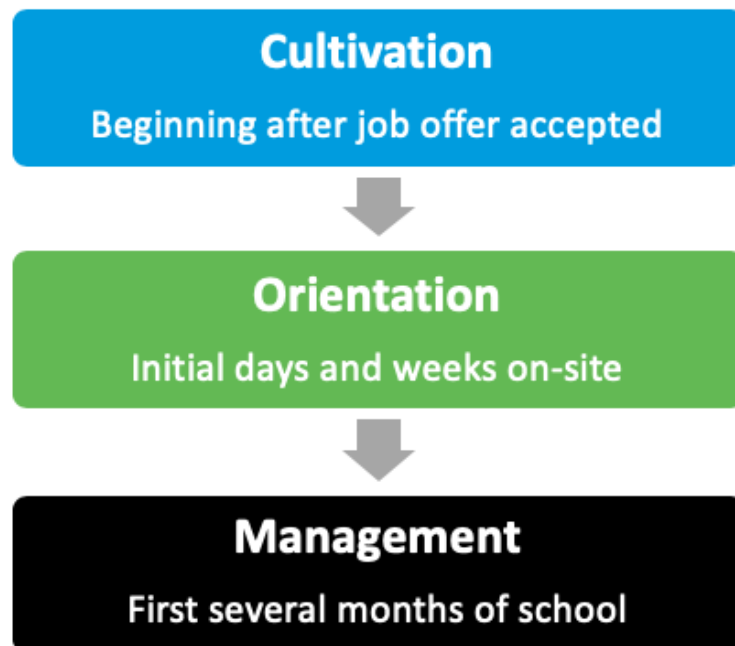


Making the Case for Strong Onboarding

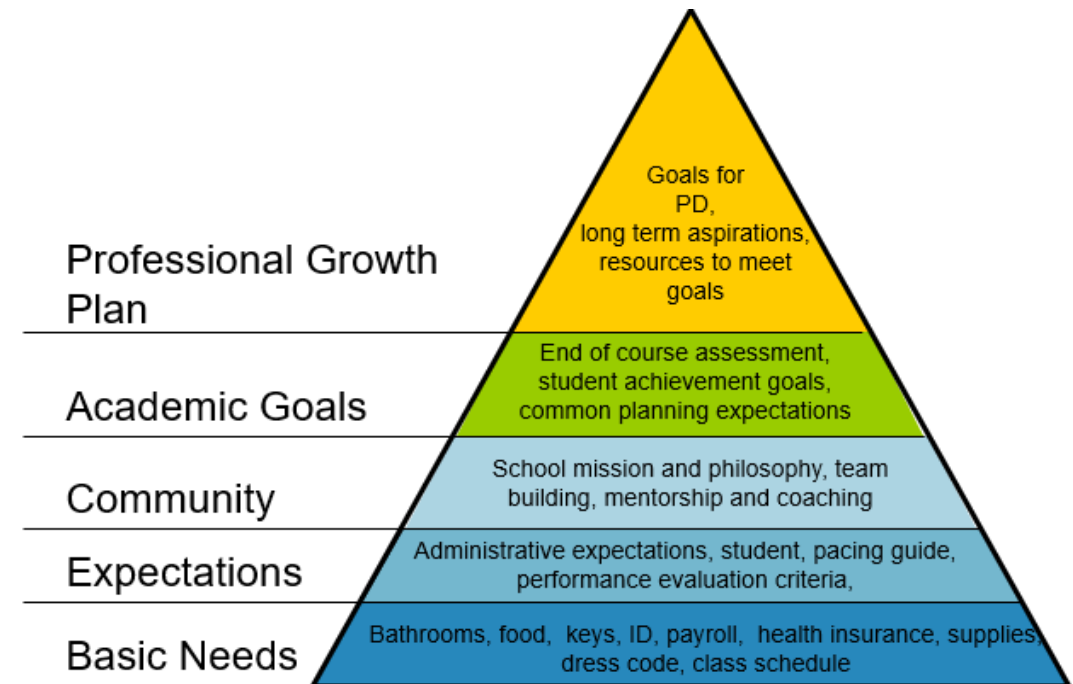


Highlight: Sample Onboarding Plan

Comprehensive timeline that offers a continuum of support



Maslow's Hierarchy of Needs to inform a plan that meets the needs of new teachers



In the Chat:
Questions, Reactions?

Cultivation: Offer to First Day

General Best Practices

- **Paperwork & HR Documentation**
 - Tracker, DocuSign, One-Stop Shop
- **Relationships & Community Building**
 - Principal outreach, Staff Ambassadors, Swag
- **New Hire Communication**
 - Newsletters, emails outlining key next steps

Virtual Considerations

- **Paperwork & HR Documentation**
 - Determine logistical needs
 - Online trainings with “quizzes”
- **Relationships & Community Building**
 - Virtual “Happy Hours” (Prep for those leading)
 - Headlines around self-care
 - Differentiated levels of support
- **New Hire Communication**
 - Transparency around COVID approach



Highlight: Communication Tracker & Talking Points

Subject	New Staff Newsletter Sent?	Email from Leadership Team Sent?	Welcome Package Sent?
Math	<p style="text-align: center;">Summer Onboarding Outreach School Leader Call to NEW HIRE - Week of _____</p> <p>Estimated Time: 10-15 minutes</p> <p><u>Purpose:</u></p> <ul style="list-style-type: none"> • Build community with new hires and school leader • Generate enthusiasm for XYZ CHARTER/school • Ensure new staff understand logistics and expectations for Orientation • Discuss school headlines related to self-care • Answer any outstanding questions about the school, HR, COVID19 planning <p><u>Key Talking Points:</u></p> <ul style="list-style-type: none"> • Welcome to the XYZ CHARTER and ____ school! <ul style="list-style-type: none"> ○ Share the mission and vision of XYZ CHARTER (4 key priorities) ○ Any unique cultural elements of the school ○ 1 or 2 reasons why they were the right candidate for the job (demonstrate understanding and personalization) ○ Discuss how they are doing and taking care of themselves during this time (COVID-19). <ul style="list-style-type: none"> ▪ Self-care is important to us at XYZ Charter. For me, that looks like _____. 		

- Track paperwork & communication
- Headline guidance for school leaders and staff

Highlight: New Hire Newsletters



Welcome to the Achievement First Team and Family!

New Staff Training is just three months away! So far, we've hired a diverse group of over 100 teachers and leaders for the 2015-16 school year.

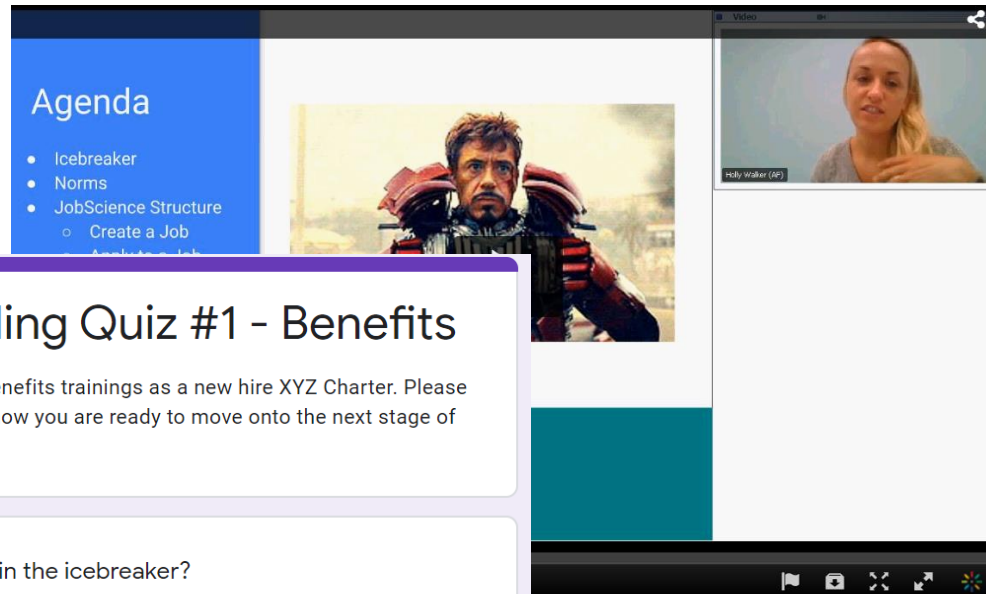
Here's a snapshot:

- Thus far, our new hires hail from 20 states—Connecticut, Florida, California and everywhere in between.
- About 50% of you will be teaching elementary school, 30% middle school and 20% high school.
- You are a mix of novices to experienced teachers with 35 years of classroom wisdom.
- You're violinists, creative artists, economists, pit bull owners and much more!

Due to growth, we still have plenty of additional openings in STEM and special education for next year. Click [here](#) to refer your friends.

Between now and new staff training, you can look forward to receiving this newsletter every month. Feel free to reach out with any questions by contacting Kerri-Ann Nesbeth on at kerriannnesbeth@achievementfirst.org.

Highlight: “Quiz” to Ensure Completion



New Hire Onboarding Quiz #1 - Benefits

Thank you so much for completing the Benefits trainings as a new hire XYZ Charter. Please complete the following quiz so that we know you are ready to move onto the next stage of onboarding.

What did Alicia share as her fun fact in the icebreaker?

- ☐ She has a dog named Mr. Buttons
- ☐ She loves watching cooking shows
- ☐ She has traveled to all 50 states

When is the benefits open enrollment period?

- ☐ June 1 - July 1

- Video trainings or document review
- Use a googleform to assess completion and roll up into onboarding tracker



Highlight: One Stop “Virtual” Shop

New Hire Onboarding Overview and Checklist

Name: _____ **Date of Hire:** _____ **Email:** _____

ORG NAME is here to help you during the hiring process. You'll have two main points of contact:

Your HR representative will be your guide and give you information about each step of the process. Ask your representative questions related to fingerprint and reference checks, salary, verification of years of experience, degree and qualifications, offer letters, new hire paperwork, and training modules.

HR Representative Name: _____

Email / Phone Number: _____

Your manager is the individual hiring you for the position. For teachers, for example, it is often the principal. The hiring manager conducts interviews and makes the hiring decision. Ask your manager questions related to start dates, school/office culture and protocols, and the onboarding process.

Manager Name: _____

Email / Phone Number: _____

1.	Reference Checks	You will: Provide information for your reference checks: Look for an email from HR, and when you receive it, follow the instructions to submit your references.	Tell your references to expect an email from HR, asking to schedule a call to complete the reference check within 2-3 business days.	Your HR representative will: Initiate a reference check with your provided references.
2.	Conditional offer letter	You will: Provide information to verify years of experience and education: Provide proof of prior employment from previous employers and email them to your HR representative. Request copies of transcripts from previous and/or current education institutions to confirm level of degree awarded and email them to your HR.	Work with your HR representative to verify your certification and/or licensing.	Your HR representative will: Send email with details about employment and degree verification. Reach out to you to request proof of appropriate certification and/or licensure.



Orientation: First Days

General Best Practices

- **Planning & Preparation**
 - Balance of hierarchy of needs (School & Org level)
 - Align on outcomes, expectations, and messaging for all levels
 - Determine how to assess participation (i.e. end of day quiz, end of day exit ticket)
- **Relationships & Community Building**
 - Whole group and small group breakouts
- **New Hire Communication**
 - Newsletters, emails outlining key next steps

Virtual Considerations

- **Planning & Preparation**
 - “Zoom fatigue” (i.e. 45 min sessions, shorter days, breaks for self-care, consider dependents)
- **Relationships & Community Building**
 - Don’t skimp on this!
 - End of day slack or phone check-ins
- **New Hire Communication**
 - Clearly outline norms for dress, virtual engagement, etc.
- **Strong Virtual Facilitation**
 - Assess and adjust; webinar safety



Highlight: Virtual Community Builders

- **Show and Tell:** Assign certain people each day (whole group) OR Bring something special that represents you (small group)
- **Whip Around Icebreaker Questions:** Can do in the chat if large groups
- **“Story of Your Name”:** Small group
- **Picture-coding:** Used to create small groups
- **Personality Assessments:** Large group reflections, Small Group Sharing

Whip Around Chat Questions

- Reading or watching
- Favorite comfort food
- Self-care activity
- Life hacks
- Best vacation
- Childhood picture and a description

In the chat:
What other virtual community builders have you all seen / used?



Highlight: Virtual Facilitation Best Practices

- EdFuel free online training
- General Best Practices
 - Chat box
 - Breakout rooms
 - Googledoc “group work”
 - Polls
 - Pictures



Highlight: Webinar Safety Guidelines

- Preparation is key
- Ensure zoom or other online platform settings are in place
- Create norms and slides for your team around how to prepare

EDFUEL ZOOM SECURITY GUIDELINES

Sourced and repurposed from Zoom.com

Must Reads

Everyone on the team is expected to read the bullets and linked pages below.

- When you share your meeting link on social media or other public forums, that makes your event extremely public. ANYONE with the link can join your meeting.
- Avoid using your [Personal Meeting ID](#) (PMI) to host public events. Your PMI is basically one continuous meeting and you don't want randos crashing your personal virtual space after the party's over. Learn about meeting IDs and how to generate a random meeting ID (at the [0:27 mark](#)) in this [video tutorial](#).
- Familiarize yourself with the [Waiting Room](#). It is an unbelievably helpful feature for hosts to control who comes and goes.
- Read the [Zoom blog](#) on keeping out unwanted guests. Most of the content for these guidelines has been sourced from this page and re-organized below so that it's tailored to meet EdFuel's needs.



Management: First Months

General Best Practices

- **Assess**
 - Create a new hire onboarding assessment
- **Relationships & Community Building**
 - New hire groups/scheduled check-ins
 - Affinity groups
 - Staff buddies or mentors
- **New Hire Communication**
 - Newsletters with new hire shoutouts / highlights

Virtual Considerations

- **Relationships & Community Building**
 - Groups may need to be virtual
 - Ensure everyone has calendar invites
- **Strong Virtual Facilitation**
 - For those leading groups



Highlight: New Hire Onboarding Assessment

Quick assessment
to determine
success of
onboarding and
needs of current
new hires

Onboarding (Questions for Each Phase)

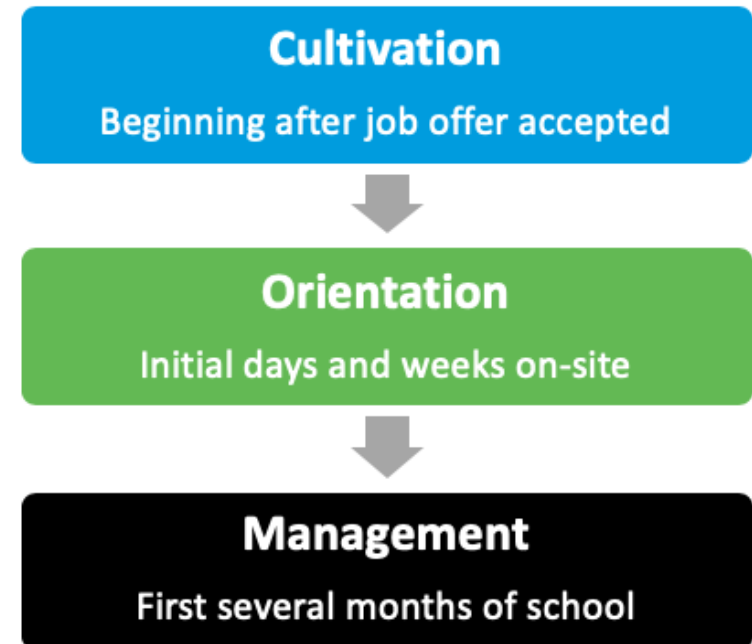
- “Someone contacted me to share their excitement about me joining the team”
- “I had all of the information I needed before school started”
- “During my onboarding process, my principal and colleagues made me feel welcomed”
- “During my onboarding process, network employees made me feel welcomed”
- “The onboarding sessions at my school provided me with key information regarding my work”
- “The onboarding sessions at the network provided me with key information regarding the organization and my work”
- “I started the school year with a clear sense of what is expected of me at work”

Current State

- “In the last seven days, I have received recognition or praise for doing good work”
- “In the last two weeks, someone at work has talked to me about my progress”
- “I would recommend working at _____” (net promoter score – scale of 1-10)

Effective Virtual Onboarding: Guiding Principles

1. **Intentional Preparation and Planning (at every phase)**
2. **Be Mindful of Where People Are (Equity and Inclusion)**
 - Differentiation for people with different needs
 - Normalize self-care
3. **Communication, Relationship Building, and Strong Virtual Facilitation**



POLL QUESTION



Agenda

- Norms and Community Building
- Effective Virtual Onboarding Strategies
- Participant Q&A
- Next Steps and Close



PARTICIPANT Q&A



CHAT
NOW

- What questions do you have?
- What is one strategy or resource that resonated with you today?



Agenda

- Norms and Community Building
- Effective Virtual Onboarding Strategies
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Do Now: Quick Survey

We really value your feedback!

- **Step One:** Please complete the feedback survey; the link is in the chat box.
- **Step Two:** Type “Done!” in the chat once you’ve completed it.



Appreciations and Next Steps

Appreciations



CHAT
NOW

What will you incorporate from today's webinar into your virtual onboarding practices?

Next Steps

Reach out to EdFuel for additional resources and support!

- Mary Mason Boaz, mmboaz@edfuel.org

