Setting New Team Members Up for Success

Whether you are a new supervisor, new to your role, or revisiting your onboarding processes, having clear processes for new staff is critical. Why? To help new staff members feel welcomed, empowered, and comfortable in their new roles. Some of these tasks might fall under Human Resources or your oversight, depending on your organization. Here are some questions with examples to get your started:

Who	**Who are important people for staff to get to know?** *(other team members, community partners, clients)* **Who are the participants that the staff person will be working with?** *(common participant needs, how to handle certain situations)*
What	**What processes do new staff need to learn about?** *(how to use databases, how to make requests for resources)* **What type of background information would be helpful?** *(program reports, news articles, website content, books)*
Where	**Where can staff find login information or other important details?** **(***login information for tools you use such as Canva or internal databases)* **Where should a new staff person work in the office (if applicable?)** **(**identifying a workstation, explaining office norms)
When	**When are important deadlines throughout the year?** *(deadlines for reports, special events for the organization)* **When do meetings take place?** *(the Community Health Worker team meets biweekly, directors meet monthly)*
How	**How can a new staff person reach a supervisor?** *(Who to contact if sick before work, which number to call during the workday)* **How should I address specific situations?** *(contact your supervisor, review the handbook)*
Why	**Why are certain rules or policies important?** *(client privacy rules, building safety guidelines)* **Why do we collect certain types of data?** *(grant requirements, organizational practices)*

Note: If you haven't already, engage current staff members. You could ask them what they wish they'd learned earlier, what information or terms were confusing at first, or what ideas they have to make processes easier to learn and follow.

Thinking Through Timelines

Another way to organize information might be thinking about milestones that you hope a new staff person will reach over certain periods of time. Your timeline will be unique to your organization. Below are some examples to get you started. You may include more milestones. The goal is to create a plan that works for you and your new team member!

Day 1

- *Log in to organization email*
- *Begin reviewing program handbook*

Week 1

- *Complete review of program handbook*
- *Shadow Lead Community Health Worker during at least 1 participant visit*
- *Do online health literacy modules 1 + 2*

Week 2

- *Reach out to all participants on case load and introduce yourself*
- *Do online health literacy modules 3-5*
- *Review the Cook County Health Atlas and do activity*

Month 1

- *Have meaningful touchpoints with all clients on case load*
- *Facilitate at least 1 participant visit with supervision*
- *Attend a local partner meeting*

Month 3

- *Organizational 3-month check in*
- *Independently lead participant visits*
- *Participate in at least 1 community outreach event to promote programming*