



The
Holdsworth
Center

VIRTUAL ONBOARDING

Given the uncertainty of our current Covid-19 reality, we know that there is a strong likelihood that onboarding for newly hired employees will need to happen virtually. While not ideal, there are ways to ensure that all new employees get the requisite information and training necessary to start their new jobs through a virtual platform.

Broadly speaking, there are two major components to onboarding:

- **Technical orientation** – Ensuring staff fill out the appropriate paperwork, enrolling them in payroll, getting technical access to systems, completing any required trainings (e.g., sexual harassment training)
- **Organization and role onboarding** – Providing staff relevant context about the organization and their role, establishing connections between staff and their manager (principal), and ensuring that staff have clarity on what's expected of them

This resource guide **primarily focuses on the second element** of onboarding noted above. While the first is certainly important, many virtual tools already exist to support technical onboarding (a few resources to support technical orientation are below). Please review the content below for some resources on navigating this second element of onboarding virtually.

Recommendation 1: Create a virtual onboarding experience to introduce staff to the district

Even for mission-driven organizations like school districts, providing incoming staff with context on a district's vision, mission, and core values is critical. This ensures that all staff come in with clarity and, more importantly, investment in the organization in which they're working. This broad introduction to the organization – in which any new staff would participate – would include a number of elements:

- Overview of the district mission, vision, values and strategic plan (if applicable)
- District-wide frameworks or cultural resources such as a leadership definition
- Context on current priorities for the district and why those priorities are important
- Key beliefs, cultural norms and/or ways of working in the district

This type of session could be adapted to a virtual environment with relative ease using a conferencing tool like Zoom, GoToMeeting, or Google Hangouts/Classroom.

Recommendation 2: Create experiences that make incoming staff feel welcome and valued

In the book *The Power of Moments*, authors Chip and Dan Heath discuss the importance of creating memorable experiences for people, including staff in our organizations, through the “little things” that matter. In particular, they discuss the onboarding practices at the tractor maker John Deere. You can find a good summary of [that section of the book is available here](#). Those strategies can be translated to school districts *and* to a virtual environment. These strategies are *even more important* in a virtual environment where staff aren’t as physically connected to their workplace or colleagues. Some ideas below:

- **Utilize technology.** Set the background of staff computers to reflect district values and cultural norms. Have a welcome email sent from the Superintendent in new staff email inboxes when they start.
- **Create connections.** Pair each new staff member with an “onboarding buddy,” a more experienced staff member at their campus or in their department who can be a friendly face as they enter a new environment and have questions about the way things work.
- **Deliberately build relationships.** Create opportunities for each staff member to meet with their manager or principal. These meetings should be 1:1 when possible. In addition, set up 1:1 meetings between the new staff member and other key stakeholders on campus so they can begin building their networks immediately. Ask returning teachers to meet with new staff for a ‘virtual lunch’ for team building and connection.
- **Foster district pride.** Many districts have swag that they provide to staff – anything from stickers and decals to coffee mugs and T-shirts. Consider sending new staff a couple of pieces of district swag via snail mail to build their pride and excitement in the district. While there is some cost in this, it’s nominal and surely worthwhile.

Recommendation 3: Align with hiring managers on expectations for onboarding, and invest them in this work

Creating connections for new staff as they start working is important in any environment. Its importance is heightened in an environment where staff may not be physically proximate to their colleagues and co-workers. While Central Office staff can implement some district-wide strategies, many of these connections and opportunities will be created by managers. To that end, we recommend setting clear expectations for managers (including principals) for onboarding:

- **Setting and aligning on expectations.** Ensure all new staff have a meeting with their supervisor to discuss what is expected during the first days and months on staff. [This article](#) has some helpful details on what that conversation should entail.
- **Create opportunities for connection.** Have Principals work with grade team leaders/department heads to create opportunities for connection within teams. Have them create meetings or “hang outs” via videoconference to build relationships and connection.
- **Overcommunicate with new staff.** Ask Principals/hiring managers to set frequent, brief check-ins with staff to answer questions and meet any needs. Since there are limited in-person touchpoints, new staff will have limited opportunity to ask questions. To that end, managers should err on the side of *over* communicating with newly onboarded staff.
- **Align on best practices for managing staff remotely.** For many supervisors, managing staff remotely is a new challenge. Discuss expectations and share best practices for managing remotely. [This guide includes many strong, practical recommendations](#) for managing staff remotely.

Recommendation 4: Create an onboarding toolkit and calendar

To support the recommendations noted above, we suggest creating an **onboarding toolkit** with resources to support hiring managers as they are onboarding staff. This toolkit should include at least a few resources:

- **90-day onboarding plan template** for principals and other managers to use. This would include benchmarks by which certain things need to happen. [This article](#) has some great ideas on what to include in a 90-day plan, as does [this article](#). Potential benchmarks in the 90-day plan would include, but are not limited to:
 - Virtual introductory conversation with manager
 - Virtual team meeting(s)
 - Virtual introduction into school/district systems, processes, procedures
- **New staff survey.** Oftentimes, managers might provide a survey to staff about working style, favorite things, and communication preferences. This type of engagement is of increased importance in a virtual environment, especially around staff communication preferences. This data will be helpful for managers to meet the needs of new staff during an uncertain time. [This resource](#) has some good ideas of potential questions to include on a new employee survey, [as does this other resource](#). We suggest adding some communication questions, such as:
 - How do you prefer to communicate and to be communicated to (email, text, phone, etc.)
 - What should we keep in mind about your availability and communication preferences given the current virtual environment?
 - What major questions do you have that haven't been answered so far in onboarding?
- **District & school policies, procedures, and documentation.** This would include the student handbook, disciplinary guide/code of conduct, employee handbook, any key cultural artifacts, etc.
- **Recorded trainings on how to use district systems, especially systems for remote instruction.** Regardless of the system your district is using for remote instruction, don't assume that new staff will know how to use them (e.g., Google Classroom). Create, record, and include trainings in the toolkit on how to navigate these systems. This likely also applies to other district-wide technology systems/processes (e.g., Schoology, Eduphoria, etc.)
- **Curriculum resources for teachers.** Providing teachers the opportunity to review curricula over the summer and prepare their instruction (whether it is virtual or in person) is critical. These resources should be part of the virtual toolkit as well.
- **Performance management resources.** Provide a detailed virtual training to staff on the tool and expectations upon which staff will be evaluated. For example, if a district uses T-TESS to evaluate teachers, provide training on T-TESS, how it is set up and how it will be used. Be sure to also provide access to the relevant tools related to the performance management system. This clarity of expectation will increase understanding of what is expected and why. This is important in any onboarding process, but is of increased importance in navigating a virtual environment.