# TOOL - ONBOARDING GUIDE

Assemble a packet (digital or printed) for new Workgroup Members that addresses all of the prompts below. Then, schedule an Onboarding meeting with new members to review all the materials together and create a welcoming space where members can ask questions, engaging with the material visually and verbally. It is essential to engage in an onboarding meeting, both to ensure that information is read and retained and to serve as a relationship building-block with the new member.

## ONBOARDING PACKET AND MEETING REQUIREMENTS

- Share a brief overview of the history of the workgroup including the goals, who the other members are, and what has been accomplished so far.

- Inform on the tools, software and apps that are commonly used by the group
    - Create a list of ALL tools that the workgroup commonly uses.
    - Do not assume that any tool is so common that everyone would automatically know how to use it.
    - Ex: Teams, Zoom, Canva, Mural, Survey Monkey, Doodle scheduling polls, Dropbox, PDFs or Word Documents (especially if they require a paid license like Microsoft or Adobe, include training on how to open and access those docs using available free software)
    - Is the workgroup subject to the Open Public Meetings Act?
        - If so, inform members that meetings broadcasted lived publicly
    - How is the chat function used during virtual meetings?

- Create Group Agreements or Code of Conduct to ensure participation and proactively anticipate and mediate potential conflicts. Obtain “buy-in” from all members of the workgroup by asking them to review, edit and approve the group agreements. Below are some examples of common components of a Group Agreement or Code of Conduct:
    - Meeting norms such as whether to speak out, raise your hand, or submit comments and questions in writing. Also include guidance about meeting roles such as if there is a formal leadership structure with a Chair and Vice Chair, if there is a regular facilitator, if there are guest speakers, and generally how members are expected to participate.
    - Make space rather than taking space: yield time to people whose perspective is underrepresented in the group.
    - Respect others’ lived experience of marginalization or discrimination.
    - Using inclusive language by asking for and respecting the use of members’ correct pronouns and gender-neutral collective nouns such as “folks” or “y’all.”
    - Offer and receive constructive feedback graciously and in good faith.

- Give others credit when it is due!
- Practice self-care by honoring your own needs and taking breaks as needed.
- Harassment or bullying of any kind will not be tolerated. Members may be muted or asked to leave by the facilitator or Chair if they exhibit aggressive or disrespectful behavior that distracts from the meeting purpose and causes harm to other members.
- Use language that is appropriate for a professional setting. Comments that reinforce harms historically perpetrated against people based on race, ethnicity, income-level, accent, gender, sexual orientation, religious or spiritual beliefs, disability, or physical appearance are inappropriate.

- Expectations about between-meeting activities
    - Should member expect communication on a daily, weekly, or monthly basis?
    - Where/how can they expect to receive information about the workgroup? For example, are past meeting materials uploaded to the Workgroup's publicly facing website? Are documents like agendas mostly shared via email a week before meetings?

- Offer training on the Public Records Act and data privacy
    - Use Tool "PRA Training for Workgroup Members" as a template to create your own public records and data privacy training.
    - Present the training verbally and visually at the onboarding meeting and also print or attach digital copy of the presentation to the onboarding packet.

- If the member is eligible for Community Compensation, train them on the compensation process (more detailed information about this can be found in EQUITY's Community Compensation Guidelines)
    - Review and sign a self-attestation form wherein the signer attests that they are "low income" or have "lived experience.
        - The form should include plain-talk definitions of "low-income" and "lived experience" and the workgroup manager should verbally confirm that the member understands these designations.
        - The member does not have to specify or prove their exact income level, nor do they have to explain their lived experience on the form. They only have to attest that they do meet the requirements.
    - Train member on process for tracking hours and requesting compensation, compensation hourly rate offered, daily cap, tax impacts if they expect to earn $600 or more in one calendar year, and public benefits impacts if an increase in

their income would affect their eligibility for any benefits they are currently receiving.