HOW TO ADAPT ONBOARDING BEST PRACTICES TO A **VIRTUAL SETTING**

BEST PRACTICES

THE MOSAIC INSTITUTE

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BEST PRACTICES

- Apply an Equity, Diversity, and Inclusion Lens
- Incorporate feedback from your team
- Invest the time
- Whenever possible, share the onboarding time commitment with the rest of your team
- Communicate often

IN-PERSON ONBOARDING

Pre-start Day

- In all communication leading up to the interview, during the interview, offer, negotiations, ensure that your organizations' policies and value statements are reiterated.
- Whenever in-person meetings occur, have a copy available

On the first day

- As soon as they start (eg 9:30am on Monday), introduce your new team member to the team, and have an in-depth Orientation session. Whenever possible, include a written manual or summary of key points.
- Assign their buddy (which may be yourself), and recommend that the buddy set up regular check-ins for additional input on the employee onboarding progress or any other organizational questions
- Later in the day or that week, circle back to the new team member to see if they have any questions about the Orientation, now that they have had some time to think about it

VIRTUAL ONBOARDING
SUGGESTED ADAPTATIONS BOLDED

- In all communication leading up to the interview, during the interview, offer, negotiations, ensure that your organizations' policies and value statements are reiterated.
- **In advance of any calls/meetings, send a copy in advance to the candidate**

- **Send an Orientation Manual or Summary of Key Points in advance, so the new team member can acquaint themselves with the organization and be prepared with any questions.**
- **Introduce your new team member to the team via email or in a general chat channel.**
- **As soon as they start (eg 9:30am on Monday), have a 1:1 meeting (or include key team members) to review the Orientation manual, focusing on organizational culture, team relationships, and other items that may be difficult for someone new to pick up in a virtual setting.**
  - **EG: We really like using emojis here in our chat (or the opposite, if that is the case).**
- Assign their buddy (which may be yourself), and recommend that the buddy set up regular check-ins for additional input on the employee onboarding progress or any other

IN-PERSON ONBOARDING

Within the first week/month

- Coordinate a casual group event to promote teambuilding (eg lunch & learn; after-work social; attend an external event)

For the first period

- Their first task should be to set some small-medium-and long-term goals related to their role and professional development (eg: complete phase 1 of project; get to know the Board; complete 1 successful event). Assign this task, and review their goals the following day.
  - Take notes or require the goals to be submitted in writing.
  - After, have weekly or bi-weekly check-ins to review the goals. Share notes on the progress.
- Check in regularly outside of meetings (daily; weekly) to see how they are settling in and initiate conversation with other team members.
  - It may be "small talk" or a more intentional activity – even a daily "good morning, how are you" can go a long way.
- Check in with the buddy to see if they require any support

VIRTUAL ONBOARDING
SUGGESTED ADAPTATIONS BOLDED

- **Coordinate a casual group event to promote teambuilding (eg lunch & learn; attend an external event & shareback; watch party; book club)**

- Their first task should be to set some small-medium-and long-term goals related to their role and professional development (eg: complete phase 1 of project; get to know the Board; complete 1 successful event). Assign this task, and review their goals the following day. **After, have weekly or bi-weekly check-ins to review the goals.**
  - Take notes or require the goals to be submitted in writing.
  - After, have weekly or bi-weekly check-ins to review the goals. Share notes on the progress
- Check in regularly (daily; weekly) to see how they are settling in and initiate conversation with other team members.
  - **It may be reserving the first 5-10 minutes of a meeting to chat and connect, or sending messages via your team chat channel – starting every meeting by checking in with all members can go a long way.**
- Check in with the buddy to see if they require any support

CONCLUSION: CASE STUDIES

At Mosaic, we experienced virtual onboarding across all of our activities. In closing, some of our team leads shared the following feedback of what went well, challenges they experienced, and propose some solutions.

Case #1: Next Generation Program Facilitators

With thanks to Erica Altomare, Next Generation Program Coordinator, for providing this feedback:

"The Next Gen team was hired just before COVID-19. Therefore, they had never met in person or had any contact with the Mosaic team aside from their interviews. This unique situation meant that we never really "transitioned" online but instead got started as a team online. This led to a re-thinking and imagining of what "on-boarding" looks like and what it means to join a team or organization. What should replace the originally planned facilitation training week, welcome lunch and orientation packages?

Successes include the flexibility of the team; available resources; collaboratively re-thinking "work" and information sharing; and organizational structure and policies.

Challenges include 'reading the room' without access to body language and other non-verbal communication; facilitating from the bottom-up (feeling less collaborative when leading online training sessions); building rapport; accessibility and equity (including accommodating different learning styles and gaps in technology literacy.

What is most important to me during this time has been the leadership skills of my supervisor and the Mosaic Institute's policies. Working in an environment where I have autonomy and space to organize my own time really helps me feel ownership over the projects I am working on and feel valued by the organization I work for, despite all other uncertainties. When your employees feel as though they are trusted, I believe they feel more responsibility in their role."

Case #2: UofMosaic Fellowship Program

With thanks to Olga Osmushina, UofMosaic Program Coordinator, for providing this feedback:

"The UofMosaic program brings together Fellows from across Canada. For us, because the program is already remote, the main question that we needed to answer was not how to manage the program remotely, but how to manage it during the pandemic.

Successes include restructuring the program and managing to still hold some of the original deliverables online.

Challenges include different reactions to COVID-19, and the impact on scheduling.

Different people deal with stress differently. We usually know what our team can handle or not under normal circumstances. However, unexpected stressful circumstances can change the way one deals with stress and the level of one's productivity. Communication is key, so it helped to have an environment where everyone feels like they can share their ideas and concerns freely. It is easier to support others, when you yourself feel supported. Knowing that you have the support of your supervisor during the pandemic – that asking for help is encouraged and that they will understand when plans change – makes it easier for you to help and provide support to others. Knowing your program well is also very important; understanding what will be feasible helps you to stay calm and make informed decisions regarding appropriate changes to the program."

RESOURCES

- COVID-19 resources for the nonprofit and charitable sector
- York University Inclusion Lens
- Tech Soup Canada: Donated/discounted technologies

About the Author

Rachel Mansell is Vice President, Operations, at The Mosaic Institute, a "think and do tank" dedicated to bringing people, communities, and nations together to advance pluralism and reduce conflict. Rachel is a detail oriented, people-focused strategist with a passion for helping others achieve their personal and professional development goals. Her interest in conflict resolution practised through the lenses of human rights, diversity, and inclusion has led her to a career working with diverse communities in the not-for-profit, public, and private sectors in both Canada and the UK. Connect with Rachel at rm@mosaicinstitute.ca or find out more at www.mosaicinstitute.ca.

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