



Onboarding a Family Leader

Onboarding family leaders can help them understand a project deeply, navigate team dynamics, and feel ready to participate fully in the goals and objectives of an initiative. Onboarding can follow the structure of the role description family leaders initially responded to and add information and context.

Project Description

- The goals and objectives of the project or initiative
 - Funders, partners, or collaborators involved in the project or initiative
 - The title of the position for the family leader
 - The type of role: staff, consultant, advisor, etc.
- *Information to share with families*
- A one-pager or infographic about the project
 - Organization mission, vision, goals
 - Staff who will be involved in the work
 - Contact person for concerns and questions

Skills and Knowledge

- Learn about family leaders' personality traits, skills, and interests through icebreakers and group activities
 - Discuss why the skills and knowledge they have are valuable to the project or initiative
 - Share what new skills they will likely develop over the course of the work through training, seminars, and other information available to the family leader
- *Information to share with families*
- Bios or profiles of the team members working on the initiative

Specific Tasks and Activities

- Meetings
 - How to prepare for meetings
 - What tools or information are needed for meetings
 - What kind of participation is expected in meetings
- Describe any other tasks required beyond attending meetings
 - What co-facilitation of meetings looks like
 - The process for developing presentations and storytelling
 - The process for planning agendas
 - The process for reviewing materials
- How to communicate between meetings

- *Information to share with families*
 - Meeting schedule for the year
 - Opportunities to connect with the team
 - Where to access information for the project (consider a shared drive that allows mobile device access)

Time Commitment

- How long the project or initiative will run
 - How much time the family leader is expected to work on the project each week, month, or quarter
 - Describe activities that will happen during each period of the project, based on the work plan.
- *Information to share with families*
 - How family leaders will demonstrate completion of their work

Expectations

- Norms or expected practices and behaviors
 - Zoom participation ground rules, like being on camera and off camera
 - Dress code for in-person and virtual meetings
 - Power dynamics that exist among team members and factors that affect power dynamics
 - How group agreements will be operationalized
- *Information to share with families*
 - Community or group agreements (opportunity for co-design)
 - How decisions will be made for the project or initiative
 - What power sharing will look like among team members
 - Glossary of commonly used terms, acronyms, and jargon (continue to build this glossary with family leaders)
 - How feedback on the family leader's experience will be collected

Compensation

- Amount and how often family leaders will be paid
 - How payments will be made (check, gift card, etc.)
- *Information to share with families*
 - How and when to invoice
 - The potential effect of payments on taxes, benefits, and eligibility for programs like Medicaid
 - Documents and forms that need to be completed for compensation for w9, direct deposit forms, contracts, etc.
 - Rules for gift cards and other forms of payment

Accommodations

- Interpretation
 - Captions
 - Meeting materials sent in advance
- *Information to share with families*
- How to request accommodations
 - Availability of interpreters
 - Availability of translated materials

Benefits of Participating

- How the family leaders will help the initiative to achieve its goals and objectives
 - What family leaders will learn or gain, including networking opportunities, certificates, etc.
- *Information to share with families*
- How the impact of the family leader's participation in the project or initiative will be communicated back to them
 - Mentorship and support opportunities

Other Topics to Consider During the Onboarding Process

- Expressing perspectives and listening
- How to ask tough questions and have difficult discussions
- What to do when you don't agree



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