Orientation Plan for New Members

Activity Output

- Collect and compile necessary team documents and diagrams for new members to access
- Create an onboarding plan and timeline for returning and new members
- Prepare for an orientation meeting and discussion with returning and new team members

Overview

As the team evolves, you will need to orient new and returning members. Whether someone is new to the team or has been on the team for years, it is helpful to provide an overview of the team values and practices. By leading an orientation meeting and a team discussion, each member will understand key diagrams, statistics, and action plans. In addition, each person can access and review key material on their own time. In this activity, you will follow a step-by-step process to collect materials, determine any barriers, and plan for an orientation meeting.

Instructions

1. Prepare and compile information on your public health and public safety partnership.

   Everyone will save time when you have go-to materials ready to share with prospective or current members. Orientees can review materials on their own time and refer to them as needed. This will help ensure your public health and safety meetings stay focused on the present or future and avoid repeating items existing members are already familiar with.

   Include:

   A. General information about the PHAST Framework.

      Such as the Toolkit Executive Summary and/or overview materials you have created for your partnership.
B. The background and organization of your PHAST. For example:
- Name of your collaborative that is using the PHAST framework
- Brief history
- Overarching goals or mission/vision
- Structure of public health and safety (leadership, workgroups)
- Roster of members and their roles, Responsibilities, contributions, takeaways

C. The current status of your partnership, like:
- Progress to date
- Key partnerships
- Current activities/focus
- Pending action and/or decisions

D. Meeting information
- Meeting calendar/frequency
- Start and end time
- Location or virtual meeting link
- Standing agenda items

2. Determine process for orienting new, returning, or ad-hoc members.
You may want to use one or more of these strategies, depending on your availability and members’ needs:
- Select materials outlined in 1A–1B above and send them before your orientation or next meeting.
- Reserve 30–60 minutes prior to your standing public health and safety meetings to orient new meeting participants.
- Hold individual phone calls with new meeting attendees prior to the next partnership meeting.
- Record a short video or PowerPoint presentation with voice over providing an orientation. Follow up with a discussion.

3. Orient members prior to their first partnership meeting, if possible.
Understanding the background, goals, and direction of the public health and safety partnership will help attendees understand the context of the meeting and contribute to the discussion. Otherwise, they may feel out of place and uncomfortable participating.
Tips and Troubleshooting

Tips

→ In your orientation session/discussion, discuss how the public health and safety partnership can contribute to the orientee's work and how their work can contribute to the partnership. In other words, what will they get from participating and what will they contribute?

→ You may want to develop a slightly different process for “ad-hoc delegates” who are sent on behalf of an existing member. Their information and reporting needs may be different than new/returning members.

→ Ask members to help prepare some of the orientation materials and to orient new members.

→ Keep track of the member benefits and contributions you identified together. The Partner Tracking Tool includes a member roster where you can document your ideas.

Troubleshooting

What if there are members attending who haven't been oriented yet? You can still orient your existing members by:

→ Inviting them to a special orientation session with other members who are not yet oriented

→ Hosting a refresher/reflection session with the full public health and safety membership

→ Following up immediately after the meeting to provide more orienting context, information, and answering any lingering questions

Suggested Orientation Discussion Questions

Talk through the below topics. This will help members know how to contribute to the partnership and its meetings. It will also help you identify how best to rely on each of your members for specific contributions (e.g., subject matter expertise; other skills).

Explore alignment with the PHAST Framework:

Review the Guiding Principles and SOS Goals together and discuss the member's perspective on each as well as their agency's perspective on them.

Explore takeaways of new member participating in partnership:

How does the work of the public health and safety partnership align with the mission and objectives of the new member’s home agency?
Are there initiatives that agency is working on that can or could connect to the work of the partnership?

How might the work of the partnership help to support, strengthen or expand those initiatives?

**Explore the potential contributions of the member:**

What does the member know or have access to that could help advance the partnership's work?

What knowledge or expertise can this member share with the partnership to help inform its work?

What role and level of involvement is the member interested in and able to commit to? See the [Member Engagement Pyramid Activity](#) for more details on this.

**Ask new members about potential barriers and needs, like:**

What are some challenges you anticipate with attending?

Do you have preferences for times or locations of meetings?

Do you need any support with tech or language for joining meetings?

**Take-Aways and Next Steps:**

- Ensure members are knowledgeable about your public health and safety partnership and engaged in its work.
- Follow-up with new members after they have been oriented and participated in meetings to answer any questions.

Don’t worry about getting it perfect. Just get it started!
**Public Health and Public Safety Partnership Orientation Plan Worksheet**

Read the prompts and document your ideas in the “response” column. Identify any action steps needed to develop your orientation plan that will help onboard new members to your team’s activities, processes, and goals.

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Response</th>
<th>Action Steps</th>
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<tbody>
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<td>Prepare and compile information on your public health and safety partnership.</td>
<td>General info on public health and safety partnership:</td>
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| 2 | **Determine process for orienting new, returning, or ad-hoc members.**  
When and how will you meet with members to bring them up to speed?  
Will you need a different process for orienting ad-hoc delegates? |
| Frequency: |  |
| Format/method? |  |
| Different process for ad-hoc delegates? |  |
| 3 | **Orient members prior to their first partnership meeting, if possible.**  
How will you hold your first orientation session?  
For existing, non-oriented members, how will you orient them to the public health and safety partnership? |
| Scheduling first/new orientation session? |  |
| Orienting existing members? |  |
Public Health and Public Safety Partnership Orientation Plan Worksheet Completed Example

Read the prompts and document your ideas in the “response” column. Identify any action steps needed to develop your orientation plan that will help onboard new members to your team’s activities, processes, and goals.

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<tbody>
<tr>
<td>1</td>
<td>Prepare and compile information on your public health and safety partnership. What easy-to-share information will you provide for orienting partnership members?</td>
<td><strong>General info on public health and safety partnership:</strong> Partner outreach presentation; needs to be updated with 2021 activities and 2022 strategic plan <strong>Background on your partnership:</strong> <strong>Current status of your partnership:</strong> <strong>Meeting info:</strong></td>
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<td>2</td>
<td>Determine process for orienting new, returning, or ad-hoc members. When and how will you meet with members to bring them up to speed? Will you need a different process for orienting ad-hoc delegates?</td>
<td><strong>Frequency:</strong> Start with monthly, see how it goes <strong>Format/method?</strong> One-hour, via Zoom <strong>Different process for ad-hoc delegates?</strong> One-on-one meetings, as needed; send orientation materials in advance of mtgs.</td>
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### 3 Orient members prior to their first partnership meeting, if possible.

How will you hold your first orientation session?

For existing, non-oriented members, how will you orient them to the public health and safety partnership?

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<th><strong>Scheduling first/new orientation session?</strong></th>
<th><strong>Orienting existing members?</strong></th>
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| Initial orientation will be a 90-minute, level-setting meeting with all members. | - Identify standing day of the month for hosting monthly orientation sessions  
- Review list of existing members to see who could benefit from an orientation |