



HOW TO

ONBOARD NEW EMPLOYEES (U.S. EDITION)

ASSOCIATION OF ESD PROFESSIONALS



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CONGRATULATIONS!



If you're thinking about onboarding for your business or nonprofit organization, that means you've come a long way.

Maybe you have just completed your training and you are eager to share everything you have learned by opening your own practice. Or maybe you've been running an ESD business or nonprofit for a bit and you are growing. Starting or growing an ESD business is exciting, but some parts can seem formidable.

We are here to help you successfully and seamlessly build your team.

Whether you are launching a business or a nonprofit, entering into a partnership, or founding a different kind of ESD-focused initiative, we would like to offer some help with the business side of things.

By hiring staff, you can empower yourself to grow your practice by bringing on board employees or contractors who can teach additional classes, manage your office, do your bookkeeping, or conduct your social media outreach and marketing. If you are expanding from a solo practice, this means you will no longer have to manage everything yourself. And, you will gain a diversity of experience and fresh ideas, which are valuable assets that will help you reach your goals.

So how do you make this happen without a dedicated HR team? It may seem intimidating now, but with this step-by-step guide, you'll cruise through the entire hiring process. These 12 simple steps will guide you through recruiting, interviewing, onboarding, and training your new team members. Your new hires will be ready to embrace your organization's culture and get to work.

Let's get started!

HIRING

1 DEFINE || Determine what you need.

Determine and describe what you need. You can't find the right person if you don't know who you are looking for.

- Knowing (and clearly describing) what you need is the first step to finding the right person for any position. What tasks and responsibilities would you like your new hire to fulfill?
- If you are looking for an instructor, do you need a beginner? Someone with years of experience? Someone who can also manage instructors? A person with experience designing curriculum?
- Create a job description that clearly outlines the responsibilities and expectations for the position you wish to fill.
- Make sure that what you are asking for is within your budget.

2 SEARCH || GET THE WORD OUT.

Once you know what you are looking for, it is time to find the right person and get the word out to your community.

- Advertise on the Association's job board located at the Career Center.
- Alert your colleagues and friends by posting to your social media channels.
- If you are a member of the Association, you can use our community channels to get the word out.
- Attend every virtual or in-person event you can and recruit there. The ESD community is full of virtual gatherings, including the Association's events, so take advantage.
- Word of mouth is still an excellent recruiting tool. Let friends, colleagues, and family members know through personal conversations and messages that you are looking to hire. You never know who they might know!

PRO TIP: If you are not sure about what you need or how to write the job description, you can tap into the ESD community to ask for advice and learn from other ESD professionals..



3 SELECT || Make your choice.

Interview. Test. Select. You are the boss; you decide who you do or do not wish to hire.



VET YOUR CANDIDATES

Inspect your haul. Review resumes and cover letters to find the candidates who meet your criteria.

Think about how you might want to diversify your staff.

Set aside resumes with potential and those that seem to be an especially good fit.

Do a little vetting. Search your candidates on Google and social media and check references for added insight.

Pro Tip: Don't forget to notify the candidates who didn't make the cut—don't leave them hanging.



DIVERSIFY

Diversifying your workforce can bring new perspectives and enrich everyone. It is one way for us in the ESD community to practice the inclusivity we teach.

Think about specific populations you'd like to reach and explain in your job listing why your organization would make a great fit.

Use diversity job boards, like those available through the Association and reach out to groups dedicated to serving a variety of populations.



INTERVIEW

If you are going to conduct interviews in person, start with video interviews to narrow the pool. Ask job candidates about things that are important to you, like:

- Their interest in your organization & ESD.
- Favorite aspects of their job.
- Achievements.
- Their ideal work environment.
- Their ESD teaching style and specialties.
- Related training in social work, martial arts, psychology, etc.
- Experience with specific populations.
- Amount and nature of ESD experience.

Consider a probationary period to give your team and new hire time to see if it's a good fit.

MAKING THE OFFER

4 HIRE || Make an offer and DON'T DELAY.

Share the good news via phone or video call. But remember, you are making an offer they can accept or reject. Be prepared in case they are considering other job offers, and think about how badly you want this particular candidate and whether you have other options. Was there more than one person you interviewed who seemed like a good fit?

Here are some questions a job candidate may ask you:

- What does the position pay? Know ahead of time how high you are willing to go in case you have to negotiate.
- Is there room for growth? Will there be opportunities for promotion, expanding my role, pay increases?

PRO TIP: If this is your first hire and you don't already have one, be sure to get an employer identification number (EIN) from the IRS website. (You'll get your number immediately after applying!)

- Does this position come with benefits, such as health insurance coverage? Perhaps you reimburse a percentage of the employee's health insurance costs? Do you provide flexible work hours or allow remote work? How much vacation and personal time will you provide?
- To whom will I be reporting? If you have a small ESD practice, this might be obvious, but you might have a couple of employees and want the new hire to take direction from one or more of them as well as yourself.

The candidate may accept right then and there or take a few days to think about it. If the candidate accepts, let them know they will receive an email with onboarding next steps. Congratulations to the both of you!



ONBOARDING

5 REPORT || SET UP TAXES AND INSURANCE.

Dot your Is and cross your Ts. Register to file unemployment-insurance tax reports with your state (this could be the employment, labor, or unemployment commission or department). Fill out paperwork to withhold state and federal taxes from your employee's wages. Set up workers' compensation insurance if it is required in your state. If you have payroll software, that will take care of some of these tasks.

6 COLLECT || GATHER ONBOARDING DOCUMENTS.

Creating a healthy employee lifecycle is critical to running a tight HR ship. And it all starts with building your employee file. Keep these basic HR documents in each employee's file—your payroll software may be a good place to store these:

Document Type	Description	What to Retain
Application	Collect all pertinent information about new hire.	Original
Offer Letter	Write welcome letter, include Statement of Work (SOW) that specifies roles and responsibilities.	Copy
Contract	Employee engagement contract/agreement.	Signed, Original
Background Check	Depends on the position—this may be required by your insurer's coverage requirements.	Original
Tax Forms	W9 For consultant, independent contractor, or part-time employee. Invoiced payment. W4 For full-time employee, taxes withheld.	Signed, Original
I-9 Verification	U.S. immigration form used to verify employee's identity and citizenship or immigration status.	Original
Direct Deposit	More control and faster payment with bank-to-bank direct deposit.	Original
Info Sheet	Reference sheet for all important information.	Original
Code of Conduct	Employee reviewed and signed code of conduct agreement.	Signature Page, Original
Handbook	Employee reviewed and signed employee handbook. Retain the acknowledgement signature page.	Signed, Original

7 RECORD || ADD YOUR NEW HIRE INTO THE PAYROLL SYSTEM.

If you use payroll software, employee information and files will be stored there and probably in the cloud—use a secure password for the software. If you don't use payroll software, make sure that all employee documents (employee files) are kept private and secure in a passcode-protected file. If you keep hard copies, store those in a locked filing cabinet. Always remember to protect the privacy of your employees.

- Add the employee's birthday and date of hire to your company calendar.
- Schedule their 3- and 6-month reviews, and add these to your company calendar as well.



8 FILE || FILE NEW HIRE FORMS WITH YOUR STATE.

PRO TIP: Maintaining thorough employee notes and records will not only ensure good employee management, but it also will protect you should you be faced with an involuntary parting of ways.

When you hire a new employee, you must submit the correct paperwork to your state government so you can legally embark on an employee-employer relationship.

- For most states, this is a W-4 form. Some states have different names for it. Check your state for current requirements. Your payroll software may be helpful with this.
- If not filed online and instead filing a hard copy with the state, a copy of what you mail to the state government goes into the employee's file with the return receipt and proof of delivery (if using USPS, you will get a return receipt and green address card showing proof of delivery).

WELCOME ABOARD!

9 SUPPLY || Prepare for success with tools and access.

Make sure your new hire is ready to hit the ground running with some basic tools. Not having these tools will slow everyone down and hinder engagement, so it's best to start out prepared.

- A company email address.
- Login information for hardware, password management tools, role-specific software, task management, collaboration, and time tracking apps and software.
- Specialist tools and equipment (if applicable).
- Branded attire (if applicable).



10 GATHER || Welcome them to the team.

People never work in a vacuum. Getting your new hires integrated into your team and feeling connected will go a long way towards ensuring employee retention.

- Schedule a team meet and greet.
- Personally give them a warm welcome as team or organization lead. It means a lot when you take the time to get to know and onboard a new employee.
- Share information about your organization's values and history so that your new employee has context and understands the mission.
- Get them trained and oriented—to the nuts and bolts of how your team works together and to your company culture.

11 INSPIRE || Exhibit your organization's culture.

People never work in a vacuum. Getting your new hires integrated into your team and feeling connected will go a long way towards ensuring employee retention.

- People love to join companies that align with their values and beliefs.
- Reinforce your culture, brand, and unique style through team-building activities, informal hangouts, consistent communication, and face-to-face exchanges.
- Build team spirit and enthusiasm for your organization.

12 ANNOUNCE || SPREAD THE GOOD NEWS.



Announce your new hire via relevant online platforms in your professional community, places like Facebook groups, your organization's social media channels, LinkedIn, and newsletters.

Make them feel valued and showcase your practice or organization's brand at the same time.

PRO TIP: Stay front and center on LinkedIn by announcing your new hire with a link to your website. Stay connected to the ESD community by announcing the new hire on Facebook and other social media groups. Be sure to include a photo!

13 ORIENT || PROVIDE OVERVIEW OF ORGANIZATION STRUCTURE.

Orient your employee to how things work and who does what. Equip them with some basic tools to give them an overview of your organization and staff roles.

- If your practice includes more than two or three employees, possibly some independent contractors, your new employee might be confused about where to go with questions. Clear information about your organizational structure will help them find their flow more quickly.
- Provide a copy of your organization's contact list, org chart, and workflow document that explains how things work and who does what.
- Clarify expectations and accountability upfront—this can help prevent disappointments down the road.

PRO TIP: Keep employees in the know with updated goals and new-staff announcements, ensuring they understand how their responsibilities and goals align with the overall business strategy. This will give them a stronger understanding of their impact and enable more informed decision-making right away.

14 REVIEW || FOLLOW a year-LONG GUIDE.

This guide takes you through key HR activities for one calendar year. Follow along and ensure success for you and your new hire.



MONTH ONE

- Complete onboarding.
- Provide regular feedback to your new hire.
- Ask your new hire for feedback, and consider how you can support them and help them shine in their new role.
- Review assignments, performance, and engagement.
- Schedule any needed training.
- Plan for regular meetings to keep them engaged and informed.

MONTH THREE

- Schedule an informal 3-month performance review.
- Review past and future assignments.
- Set performance goals.
- Give and ask for feedback.
- Check progress on their training.
- Discuss the close of the probationary period (if relevant).

MONTH SIX

- Conduct a six-month performance review.
- Review the employee's goals and progress.
- Set goals and objectives for the next 6 months.
- Ensure they have received needed training.

ONE YEAR

- Conduct a yearly performance review.
- Celebrate their first year at your organization.
- Discuss goals, projects, and plans for the upcoming year.
- Answer any questions and give/receive feedback.
- Discuss compensation and raise policies.



FINAL WORDS

WHAT ABOUT INDEPENDENT CONTRACTORS?

For those of you who may want to hire independent contractors, the process is much simpler. The hiring portion of the process is almost identical except that you may conduct the search for your candidate differently. In addition to the places you look for an employee, you may add an Internet search for small businesses who do the work you need and you may want to look at job search engines that specialize in freelancers, such as Fiverr and Upwork.

The offer and negotiations won't be too different, but you can forget about much of the paperwork associated with the onboarding process. You will need to have the contractor fill out a W-9 form and you will keep that on file and use the information to file a 1099 with the IRS. You will also need to prepare a contractor agreement.

Look out for our How To about independent contractors from both the employer and independent contractor perspectives, coming soon.

Any PARTING advice?

Maintaining thorough employee notes and records will not only ensure good employee management, but it also will protect you should you be faced with an involuntary parting of ways.

Think about checking out websites of larger ESD organizations such as NWMAF, IMPACT, ESD Global, ESD Alliance, Pink Belt, PlayItSafe Defense, Malukah, No Means No Worldwide, and more to find virtual events and other candidate leads in the broader ESD community.



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