Tip Sheet
Onboarding New Adult Immunization Program Staff

Onboarding, or the process of integrating new staff into an organization, involves educating new employees about an organization's norms and policies and easing their entry to the role through formal and informal activities.[1] The ultimate goal of onboarding is to engage and equip new staff to become contributing members of the organization in the first few weeks of their employment and for the long term.
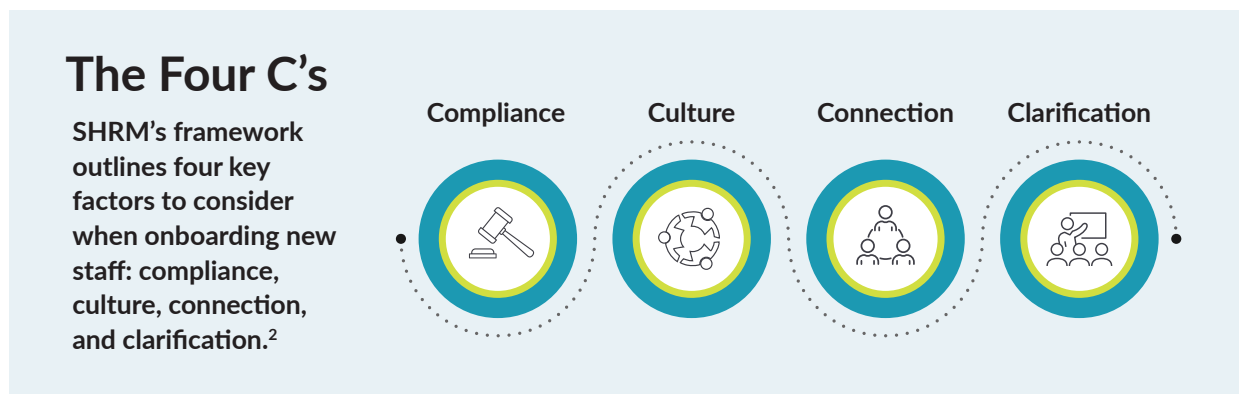
Onboarding is an important process for the new employee and the organization. Effective onboarding can build an organization's capacity and is associated with increased job satisfaction, improved job performance, and reduced turnover.[2,3,4] Though factors outside of an organization's control (such as shifts in political dynamics or economic conditions) can impact organizational capacity,[4,5] an effective onboarding process can help strengthen an organization's ability to withstand these challenges.

Establishing a successful onboarding process for new adult immunization program (AIP) staff is especially important for combatting the unique challenges that AIPs face. AIPs at all levels of maturity can experience stressors related to limited time and resources; staff not feeling supported; staff burnout; leadership challenges and turnover; and new outbreaks or pandemics, such as the COVID-19 public health emergency.[4] Such challenges require AIPs to quickly adjust to new work environments and adapt their organizational processes, including onboarding.

Through their onboarding process, AIPs have an opportunity to build resiliency among their staff so that they are prepared to face challenges. Onboarding activities could include establishing communication practices to ensure that staff feel supported; emphasizing the AIP's values, mission, and culture to prepare staff for the changing work environment; and offering activities to connect with peers and to relieve stress.[6]

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Using the Four C's for onboarding

Conceptual frameworks are useful tools to help AIPs consider how to structure their own onboarding practices and set up their staff for success. In particular, the Society for Human Resource Management (SHRM) shares "the Four C's" framework for onboarding in its Onboarding New Employees: Maximizing Success resource. This tip sheet describes how each piece of the framework—(1) compliance, (2) culture, (3) connection, and (4) clarification—can be applied to onboarding AIP staff. It also offers related guidance and resources for AIPs. This tip sheet was informed by secondary research and insights that AIPs shared during technical assistance activities for the Member Assistance Program (MAP). This resource aims to support AIPs that are bringing on new in-person, hybrid, or remote adult immunization staff.

The Four C's

SHRM's framework outlines four key factors to consider when onboarding new staff: compliance, culture, connection, and clarification.[2]

| Compliance | Culture | Connection | Clarification |

Equip staff to understand **compliance**

Compliance is the most fundamental level of the framework. Compliance involves educating staff on policies that define their organization's regulations and rules.[2] For AIPs, this could include not only educating new staff on internal policies, such as a code of conduct and sick leave, but also on the broader regulatory and policy environment for adult immunization, including state immunization mandates or laws such as requirements for university students, health care workers, and patients.[7]

- Provide new staff with resources to increase their knowledge of adult immunization rules and regulations and of policies affecting adult immunizations, such as the following:

  - Centers for Disease Control and Prevention's (CDC) Vaccination Laws –a webpage summarizing state immunization laws for health care workers and patients

  - Immunize.org's State Requirements by Vaccine –a resource list of state laws and mandates, organized by vaccine, that is informed by state health departments

  - Partnering for Vaccine Equity (P4VE) Vaccine Resource Hub –a CDC-funded website with free educational materials and resources on adult-recommended immunizations and related topics, such as P4VE's webinar on Understanding Immigration Policy's Effects on Vaccine Equity

Demonstrate your organization's culture

Culture, which is a broad category that includes the beliefs, values, behaviors, and norms established by an organization's leadership and staff, is unique to each program or organization.[8, 9] This element of onboarding provides new staff with a sense of organizational culture through formal and informal channels. For example, an AIP might highlight its core values through an employee appreciation program in addition to offering more informal ways to reinforce its culture, such as through social events and an open-door norm that invites new employees to openly communicate with their colleagues.

- Provide education and training related to cultural sensitivity to help new staff navigate cultural differences, values, beliefs, and behaviors when they engage directly with adults receiving immunizations or with AIP partners. Share resources to support staff to identify preferred methods of communication, potential language barriers, customs, and beliefs to ensure that information is being conveyed and received as intended and to respect others' culture and beliefs, for example:[10]

  - Being Culturally Competent in the Modern Workforce –an AIM webinar that discusses cultural competence in the workplace, including how microaggressions and biases impact diversity and inclusion at work.

- Embed diversity, equity, and inclusion (DEI) principles in the onboarding process. Organizations that foster a culture that embraces DEI and values the unique qualities and perspectives of their employees can increase employee retention and job satisfaction.[11] Employees are more likely to be invested in an organization that is inclusive and supportive.[12]

Offer opportunities for connection

Connection refers to the interpersonal relationships and information networks that staff establish. Connecting can be a challenge for new staff who work remotely, because they have fewer opportunities to interact with colleagues and develop relationships compared to in-person staff.[3] Offering activities that encourage socialization and foster relationships in any work environment promotes connection among AIP staff.

- Be intentional about welcome activities that provide opportunities for new staff to socialize with their peers.[2, 13]

  - Create a welcome package of onboarding materials or make a welcome phone call to recognize the new hire and help them become a part of the team.[13]

  - Set up lunch meetings, coffee chats, and meet and greets to provide opportunities for new staff to meet colleagues across the organization.[13]

- Facilitate mentorship and shadowing opportunities, not only to demonstrate functional aspects of the role but also to build relationships.[13]

  - Encourage tenured team members to reach out to new staff.

  - Connect new staff with a peer buddy who will be responsible for supporting them through the early onboarding process and guiding them through their transition onto the team.[13, 14] Assigning a buddy either in a similar role or from a different part of the program can help new staff understand various aspects of the AIP, broaden cross-functional connections, and provide a personal connection that can help new staff feel supported.[15]

- Tailor onboarding activities to different work environments (in person, fully remote, or hybrid) to ensure meaningful connections among staff regardless of their location. For example, consider hosting online social hours, virtual lunches or coffee breaks, and virtual tours for remote or hybrid staff.[16]

💡 **Tips from AIPs**

- Incorporate shadowing to help new staff understand their role, advance their knowledge and skills, and promote relationship building.

- Reserve a portion of internal meetings for informal conversation or encourage staff to join meetings 15 minutes early to connect on nonwork items.

- Encourage in-person opportunities to interact as a team when possible. For example:

  - Convene the entire team in person for a few days every quarter to hold team building exercises and trainings.

  - When on-site, invite colleagues on brief walks or coffee breaks. For new hybrid staff, check their schedule to know when they will be available in person.

  - Share food as a team one day a week to encourage staff to come into the office and get to know one another.

Provide **clarification** on staff roles

Clarification refers to ensuring that new staff understand their roles and all related expectations. For AIPs, this includes facilitating knowledge of new staff roles by offering trainings and resources on adult immunization and defining the skills required to be successful.

- Communicate expectations clearly by sharing resources that reflect the skills, knowledge, and behaviors required for the role.

  - Determine new staff's baseline knowledge and identify any gaps to support their growth. The Rise to Immunize Campaign Toolkit outlines a process for determining providers' and staff's baseline knowledge of adult immunization and developing an education plan to fill gaps. The steps may be relevant to AIPs that want to bolster new staff's incoming knowledge base.

- Show new employees how their role contributes to advancing the goals of the organization and how this effort fits within the broader adult immunization field. This approach can strengthen their sense of purpose and increase their knowledge of the field, which may inform their own job discipline.

  - Use the Immunization Program Operations Manual (IPOM) as a guide to educate new staff about immunization program goals and strategies as well as required activities and performance measures. Highlight the resources embedded within the IPOM, including lists of commonly used acronyms and key immunization websites.

  - Encourage new staff to explore resources directly and tangentially related to their role, such as the following:

    > For more immunization-related courses and trainings from the CDC, other federal agencies, and federally funding partners, visit the CDC's Immunization Education & Training website.

    - CDC's Pink Book Series –a series of one-hour, on-demand online videos that provide an overview of vaccination principles, general best practices, immunization strategies, and vaccine storage and handling, among other fundamental immunization topics.
    - CDC's You Call the Shots –an interactive, online training course that consists of modules on vaccine-preventable diseases and recommendations for immunization use.
    - P4VE's Community Connector –offers resources to advance vaccine equity, including for adult populations. Resources for P4VE-funded organizations include directories to connect with peers, discussion forums, and learning events. This resource also includes the publicly available Vaccine Resource Hub (referenced above). The hub includes relevant adult immunization education materials such as:
      - Vaccines Across the Adult Lifespan webinar –provides an overview of routinely recommended adult vaccines.
      - Increasing Vaccinations Among Young Adults webinar –shares strategies on how to engage young adults and older adults in vaccinations.
      - Partnering with Local Health Departments for Vaccine Equity webinar –discusses how partnerships between community-based organizations and local health departments can be used to improve vaccine equity.
    - CDC's vaccine information statements –fact sheets that detail the benefits and risks associated with vaccinations and that are required by federal law to be shared with vaccine recipients.

- Provide an overview of the Immunization Information Systems (IIS), and encourage new staff to explore their AIP's IIS. If new staff are not familiar with the IIS, consider first sharing general CDC resources:

  - What Is IIS? –describes the IIS and how it can support immunization programs.

  - Basics of Immunization Information Systems –a flowchart that provides a high-level overview of how the IIS works.

  - Immunization Information Systems Data Quality Blueprint –a visual guide to help immunization programs advance IIS data quality by ensuring that data are complete, timely, valid, and available.

  - IIS Resources and Reference Materials –a repository of IIS resources, such as a list of acronyms, FAQs, upcoming conferences and events, publications, and partner organizations.

- Provide access, if needed, and an overview of the Vaccine Tracking System (VTrckS), a web-based information technology system to support immunization programs with manual processes, data entry, and vaccine supply management.

  - VTrckS Functionality –outlines the major functions within VTrckS that support the vaccine management process.

  - Pandemic Vaccine Program Distribution, Tracking, and Monitoring –demonstrates how VTrckS can support vaccine distribution during an emergency or pandemic response.

- Encourage new staff to explore professional societies engaged in adult immunization, which can offer free and member-only access to relevant AIP resources, to better understand the field. Professional societies can advance adult immunization goals, share new information, and provide opportunities for collaboration and training. They offer resources for new staff to expand their network; learn from experts, including peer immunization programs; and further develop a sense of purpose and belonging. Some groups maintain resources that can help new staff better understand topics relevant to their AIP, for example:

  > Visit AIM's website for additional resources to support new adult immunization program members, such as the Member Assistance Program (MAP) Business Operations Toolkit, REACH podcast, and AIMing to Inform podcast.

  - American Immunization Registry Association (AIRA) –a member-based professional society dedicated to IIS.

    - AIRA's events calendar –contains member-only and public events.

  - National Association of County and City Health Officials –an organization serving and advocating for local health departments.

    - Communications Toolkit –explores relevant education and engagement materials.

    - Roots of Health Inequity Learning Collaborative –offers an online training course specifically for local public health department staff on the root causes of health inequity.

- ○ National Foundation for Infectious Diseases –an organization dedicated to educating and engaging the public, communities, and health care professionals in infectious diseases.
  - ▪ Tools and resources –a webpage containing graphics, videos, webinars, stories of people impacted by infectious diseases, expert perspectives, and other tools to increase knowledge and advance immunization goals.
  - ▪ Infectious IDeas –a podcast series featuring guest speakers working to improve the prevention and treatment of infectious diseases.
- Set up regular one-on-one check-ins with new staff or leave time at the end of weekly team meetings to address questions that arise during onboarding. Consider daily check-ins with remote staff to address concerns or questions that arise early on.[17, 18] It is important to create open communication channels between new staff and supervisors to answer questions, provide feedback, and follow up throughout the onboarding process.[2]

💡 Tips from AIPs

- Focus first on processes that are easiest to observe. For example, one AIP in the Midwest found that storage and handling visits were easy for new staff to shadow and could be coordinated with hybrid or remote staff.

- Set up trainings with the IIS manager or VTrckS to help new staff learn about its features and how to interpret reports that may be relevant to their role.

Additional strategies to onboard remote or hybrid staff

- Ensure that remote or hybrid staff have appropriate resources and distraction-free workspaces.[18, 19]

- Create a virtual workday that mimics being in a physical office. Plan to teach new hires in small steps and provide detailed explanations.[18] Consider developing visual aids, such as spreadsheets or flowcharts, and having existing staff conduct mini tutorials.[18]

- Assign self-learning modules to supplement each newly learned process or job duty in their training.[18]

- Establish meeting formats that are inclusive of remote staff, such as using screen-sharing technology, and review previous discussions to support new remote or hybrid staff.[17, 18] Consider using meeting engagement tactics for virtual meetings, such as starting with virtual icebreakers, devoting time for social activities, and scheduling meet and greets with key personnel in other departments.

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