Onboarding Process Improvement - Charter

1. Vision Statement

Code for Durham has been an active brigade for ~6 years and has seen about 24 or less participants in each meetup over the past year, and about 140 people that are members of the Brigade Durham Slack channel.

The focus of the group is to work with local governments to embrace and utilize new technology to make cities better for everyone. The brigade breaks up into smaller project teams to work during biweekly meetups and on volunteer's own time, bringing technology projects to life. The projects enable easier and farther-reaching systems that support civic goals like affordable housing, food insecurity, and equitable access to public services.

With an improved onboarding process, the brigade could better serve its members and improve retention and diversity, as well as provide better products to their public sector partners.

2. Mission Statement

In April 2020 the brigade decided to have a few Design Thinking sessions to determine how to improve the new member and onboarding process. During the Design Thinking sessions, the group shared their ideas, identified common pain points, generated ideas for solutions, and came to a consensus about the next steps.

The mission of this initiative is to improve the project onboarding experience for new and repeat members so people feel welcome, are able to contribute, and inspired to return. We want to answer the questions:

> *What do new members need to know? How do they get started?*

During the Design Thinking sessions, consensus pointed to the need to first focus on:

1) Tutorials and Skills Development Sessions
2) Onboarding Tools
3) Project Matchmaking

See this project's github repository here:
https://github.com/StarMillie/codefordurham-newmembersupdate

The goal is to improve upon the tools available, which consist of the Code for Durham website for mission and project information, github for working documents and project work, meetup for meeting planning and management, and slack for overall communications:

- https://codefordurham.com/
- https://github.com/codefordurham
- https://www.meetup.com/Triangle-Code-for-America
- http://code-for-nc-slack-invitations.herokuapp.com/

3. Target Users

We envision that all brigade members can benefit from the improvement of the onboarding process. New members represent the most immediate need, since this user group has the least knowledge and experience with the structure of the brigade and how to begin to get involved. However, there are many reasons why long-standing members could utilize these tools such as: finishing one project and wanting to join another, they are not currently utilizing all of the member resources, or their skills are needed on different projects for short-term stints.

The initiative should cater to the following personas, with special consideration for unique needs of racial, gender, & socially diverse people in accordance with our Code of Conduct encouraging participation from women, minorities, and traditionally marginalized groups (click here to download persona details):

Persona Type	Background and Motivations
1. A first-time participant who is new to the tech field	Attended 0-6 meetings
	New to RTP
	Wants to meet others in the same field
	Wants to know how they can help their communities
	Searched for volunteer opportunities and made the effort to try something new
	Recently completed training and wants to practice
2. A first-time participant who has experience in the tech field	Attended 0-6 meetings
	Searched for volunteer opportunities and made the effort to try something new
	Wants to know how they can help their communities
	Wants to contribute their skills to something new and impactful
3. A repeat participant	Finishes a project and hasn't found a new one yet
	Considers themselves part of a particular project
	Ranges from a few months of volunteering to years with Code for Durham
	Wants to meet new people
	Is working toward a project goal, deadline
	Wants to be an impactful volunteer
	Wants to work on building new skills
	Wants to contribute their skills to something new and impactful

4. Organizing work

Each of the categories that came out of the Design Thinking sessions will become a workstream, aka working group, with members focusing on their individual missions. We will work in [Trello](#).

Team Name	Mission	Team members
Skills Development Sessions	This team will develop a plan to provide tutorials and skills development resources for the brigade, and implement it. They can use any means they deem appropriate, but may consider: ● Mini skills lessons ● Theme nights around specific skills ● Creating a list of resources ● Publicly identifying interests and skills **Needs statement (draft): As a person interested in/working in technology, I need a way to build my skills in order to be helpful on new projects and add to my resumé.	Dane*, Laura, Nicholas, Schaffer, Dev, Priya
Onboarding Tools	This team will develop a plan to simplify and streamline the onboarding tools available, and implement it. They can use any means they deem appropriate, but may consider: ● Automated onboarding into communication channels ● Centralizing hosting, tools, licenses, etc ● Catering to individual onboarding preferences (before/during/after/video/ documentation)	Celeste, David*, Nicholas, Shelia, Shane

	● Brigade swag (Consult Laura) ● Starter projects/tasks (brigade-focused) **Needs statement (draft): As <u>a new member of the brigade</u>, I need a streamlined, documented, and accessible process in order to <u>begin working on a project</u>, <u>find help when I need it</u>, and <u>feel welcomed to the team</u>.	
Project Matchmaking	This team will develop a plan to improve the process of adding new people to projects and ensuring a good fit, and implement it. They can use any means they deem appropriate, but may consider: ● Publicly identifying interests and skills ● "Quiz" to find project match ● Example tasks with skills needed as a menu for project leads/preview for new members **Needs statement (draft): As a <u>new member of the brigade</u>, I need a way to <u>join a project</u> in order to <u>make a contribution and feel like part of the team</u>.	Brian*, Millie, Dev

*Team lead

Needs statements should be updated by workstreams if needed. The should follow a standard format, where [ ] indicate editable fields: As a [role or persona], I need [a requirement that is focused on capability **not a specific feature] in order to [achieve a goal]. ➡ **Create individual needs statements for each need.**

At any time, a workstream can reach out to Millie if they are in search of a specific skill or additional resources. Workstream members can be added or people can decide to stop participating at any time. Please let Millie know if you'd

like to change your level of engagement. Workstreams should consult with each other on any elements that cross over or affect each other.

Unless the group prefers a traditional working structure, the workstreams will attempt to work in the Agile framework.

5. Iteration Schedule

Iteration	Dates	Goal
0	June 9-June 22	Identify team lead, create workspaces like trello/github/ slack channel etc., finalize needs statements, create backlog for Iteration 1
1	June 23-July 6 *July 4th holiday - plan accordingly	Research and make progress on addressing needs statement(s)
2	July 7-July 20	Research and make progress on addressing needs statement(s)
3	July 21-August 3	Research and make progress on addressing needs statement(s)
4	August 4-August 17	MVP 1 Implementation

Hopes and Fears Data

Sticky Text ▼
We agree to some great next steps, but no one has time to implement
We come up with good ideas but they take a lot of work
I worry about duplicate work being done across brigades
New members are scared off
I worry about not knowing that there's a project in need that I could help with
not accomplishing anything (no change)
Fear that it might never feel "done"
New projects start and then stall frequently
Fear that we'll create something that one person has to manage and it becomes a burden
we end up with a group of people that doesn't represent durham

6. How we define success

We hope that a better onboarding experience will lead to longer engagement periods for new volunteers and therefore higher quality products for our public sector partners. By September 2020 we hope that there are more engaged volunteers that regularly contribute to projects, more attendance to the meetups, and more satisfied members.

Project teams can develop their own KPIs according to their own success ideals.

In order to enable all members to work confidently, we want to share the following fears that were voiced during the Design Thinking session. Consider these as you design your new plans and experiences (see image).

7. Priorities and compromises

The vision for Minimum Viable Product (1) is to provide new tools that address members' needs to understand the communications landscape and mission of Code for Durham, quickly onboard into a project, and learn new skills.

- A priority is to implement new processes for the meetup meeting structure and online tools to reflect an improved, streamlined onboarding process.
    - A compromise is to identify and define a plan to implement those processes and tools.
- A priority is to consult with new members to validate assumptions and research options for solutions.
    - A compromise is to ask current/longer standing members to think back to their own experiences and preferences; or use published research.
- A priority is to engage new volunteers that regularly contribute to projects.
    - A compromise is to increase engagement of current members.
- A priority is to increase attendance to the meetups.
    - A compromise is to increase overall engagement, including project engagement outside of the meetups.
- A priority is to...
    - A compromise..

8. Project Steering

At the kick-off meeting it was decided that milestone or playback zero playbacks can be held during the meetups to encourage broader feedback from the group.