

Member Recruitment and Retention Assessment and Planning Tool



Lived Experience Grove

Instructions:

Under each set of best practices, identify ways you may already be implementing one more more of them when recruiting and onboarding members of lived experience partnerships. Where there is opportunity, consider using the planning notes to document ideas to implement in your local planning process.



Recruiting and Onboarding Practices

1. Does your process provide an opportunity for potential members to think about what the work is and why they are interested in joining the group?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

- 2.** Does your process provide an opportunity for potential members to reflect on how they want to be involved? How do they want to leverage their passions and skills beyond lived experience?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

- 3.** Does your process assess existing connections and/or relationships with current members and overlapping engagement in related efforts?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

4.

Does your process assess for diversity and representation that is reflective of your community?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

- 5.** Does your process assess for specific skill sets, unique perspectives or lived experience experiences the group seeking or or has identified as a priority for new member recruitment?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

- 6** ● Is your process transparent about compensation structure, support offered beyond pay (supports, professional development opportunities, etc) and opportunities for employment pathways?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

- 7.** Does your process offer opportunities to meet with potential members in addition to an application process (i.e. a meet and greet luncheon, full board interview rounds, etc)?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

8. Onboarding materials include, at a minimum, information about the group's scope of work, member agreements, compensation and support structure and group processes (scheduling, communications, terminology)?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

9. You can identify 3-5 specific ways new members are made to feel welcomed as they are onboarded?

Yes / No

Planning Notes: If not, how would you implement this practice?

Recruiting and Onboarding Practices

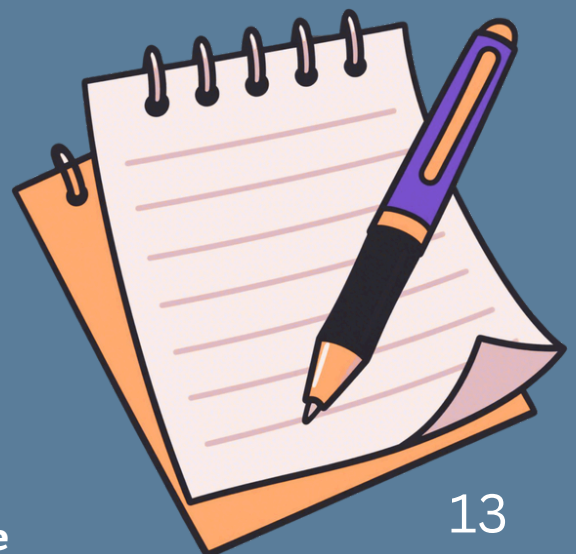
10.

What other considerations have you identified after responding to the planning prompts above?



Instructions:

Under each set of best practices, identify ways you may already be implementing one more more of them in supporting retention and offboarding members of lived experience partnerships. Where there is opportunity, consider using the planning notes to document ideas to implement in your local planning process.



Member Retention and Offboarding Practices

1. Are individual member support and financial needs in addition to compensation assessed on a consistent basis (i.e. monthly, quarterly, bi-annually)?

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

- 2.** Can you identify 1-3 specific ways members are supported to build their professional network?
Both on an individual basis and as a group?

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

- 3.** Can you identify 3-5 training and professional development opportunities made available to members to grow their personal and professional skills?

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

- 4.** The group pauses its work to formally evaluate how things are going. This can include review of workplans, group impact, relationships and partnerships, decision making practices, etc..

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

- 5.** The group has conflict resolution processes and practices in place to address harm, accountability and to repair relationships.

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

6.

The group has agency and capacity to get involved and have impact on goals and priorities beyond contracted activities.

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

- 7** As members off-board from the group, are there 1-3 rituals, traditions, practices to celebrate their contributions and impact. (i.e. compensated opportunities to stay connected as an alumni to leverage their expertise and skills?)

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

8. Can you identify 1-3 employment pathways made available to members off boarding from the group?

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

9. Can you identify 3-5 specific ways the group practices staying connected and being in community with alumni?

Yes / No

Planning Notes: If not, how would you implement this practice? Planning Notes:

Member Retention and Offboarding Practices

10.

What other considerations have you identified after responding to the planning prompts above?

