



## HAR Guide to New Fellow Orientation



Population Leadership Program



**PUBLIC  
HEALTH**  
INSTITUTE

[www.popldr.org](http://www.popldr.org)

# WELCOME

## Host Agency Representative

The Population Leadership Program (PLP) staff strives to achieve quality experiences for Fellows, HARs, and support staff, as well as organizational satisfaction for USAID and the Public Health Institute (PHI). The strong working relationships we enjoy with our colleagues are crucial to the growth and success of our program. Timely and accurate information helps us all achieve our goals, which is why we designed this orientation guide. We hope that it will:

- Provide a comprehensive overview of a fellowship orientation
- Bring clarity and simplicity to your HAR role during orientation
- Offer efficient support and references

Orientation begins prior to the Fellow's start date, and culminates approximately four months into the fellowship with the delivery of an annual workplan and a solid professional development plan. We structure orientation in 5 discrete time periods (see chart, next page):

<b>Timeline</b>	<b>Supporting materials</b>
Pre-start (~1 month before start)	Overview; HAR checklist
First day	Overview; HAR checklist
2nd - 5th days	Overview; HAR reference
First 6 weeks	Overview; HAR reference
First 4 months	HAR reference

Implicit in this plan is that a Welcome Buddy and HAR be available (pre-start for 1-2 hours, and then as needed) for every Fellow. PLP staff delivers counterpart materials to the Fellow and the Fellow's Welcome Buddy during the pre-start period.

We look forward to working with you.

### Your PLP Contacts

**Laurel Halsey, MBA** PLP Personnel Manager  
**510.285.5672** [lhalsey@popldr.org](mailto:lhalsey@popldr.org)

Provides day-to-day operational management of fellowship backstopping, including HARs' and fellows' orientation, ongoing support, fellows' annual evaluations, and provision of equipment. (Berkeley)

**Sharon Rudy, Ph.D.** PLP Director  
**202.661.8024** [srudy@popldr.org](mailto:srudy@popldr.org)

Develops strategic vision and technical direction of PLP, with particular focus on evaluation, professional development and organizational consulting work. Primary liaison to USAID, CAs and external organizations. Supervises Fellows. (D.C.)

# ORIENTATION

## PLP Fellowship

Activities guided by HAR in bold



- Program Orientation for Fellow
- **Program Orientation for HAR**
- **Background resource materials delivered**
- **USAID Security briefing**
- Conflict of interest discussed

### **HAR Meeting**

- Welcome Buddy
- CTO meeting
- Orientation to RRB
- **Lunch**

### 1-on-1s with SMT and key staff

- Library orientation
- Online resources orientation
- Support services orientation
- Start USAID overview
- Schedule key meetings

### **Create initial workplan (1st month)**

- **HAR meetings**
- Division overviews
- Technical documents
- CA meetings
- **USAID sessions**

- Annual workplan complete
- Professional development plan complete

**First day**

**First week**

**Within 6 weeks**

**Within 4 months**

**Pre-start 30 days**

# PRE-START DATE—OVERVIEW



## Objective

*The Fellow, HAR and PLP staff will share expectations of the fellowship goals, fellowship support, and orientation plan.*

## Results

*By the Fellow's start date:*

### 1. *The HAR and a PLP staff member will:*

- a. Reach a mutual understanding of the HAR role, responsibilities and expectations vis-à-vis PLP's role, responsibilities and expectations; the Fellow's technical scope of work, and professional development.
- b. Identify key contacts, working groups, etc. for Fellow to meet with during first six weeks.
- c. Identify key background documents the Fellow will need to review.
- d. Finalize terms in the Memorandum of Understanding.

### 2. *The Fellow will meet PLP staff to:*

- a. Understand the vision and mission of fellowships.
- b. Understand PLP staff roles and the fellowship support team.
- c. Understand security protocols.
- d. Review personnel and travel policies.
- e. Review just-in-time online resources.
- f. Receive key background documents for review.
- g. Discuss USAID culture and the HAR role.
- h. Finalize terms in the Memorandum of Understanding.

3. In conjunction with professional development, the Fellow will complete an online leadership self assessment and be oriented to online journaling.

4. The Fellow will receive a USAID security briefing and security badge.

## Activities

ACTIVITY	LEAD	TIME
HAR-PLP staff meeting	PLP Contact	1 Hour
Fellow's PLP orientation	PLP Contact	2 Days
Access online leadership tools	PLP Contact	1 Hour
Attend USAID Security briefing	PLP Contact	4 Hours
Review background documents	Fellow	Variable

# PRE-START HAR CHECKLIST



✓	EVENT	NOTES
	<p><i>Assure funding for the initial fellowship term:</i></p> <ul style="list-style-type: none"> <li>• Fellowship budget according to PLP estimate</li> <li>• Organizational development funds, if applicable</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
	<p>Review HAR role and responsibilities</p>	<p>(With PLP contact)</p> <hr/> <hr/> <hr/>
	<p>Establish co-HAR structure, if applicable</p>	<p>(Offsite fellowships only)</p> <hr/> <hr/> <hr/>
	<p>Identify a Welcome Buddy</p>	<hr/> <hr/> <hr/>
	<p>Finalize Memorandum of Understanding</p>	<hr/> <hr/> <hr/>
	<p>Identify key contacts and working groups for the Fellow's first six weeks</p>	<p>(Note list to PLP staff member)</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
	<p>Identify key background documents the Fellow should review</p>	<p>(Note list to PLP staff member &amp; Welcome Buddy)</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
	<p>Discuss HAR role vis-a-vis supervisor's role</p>	<p>(With Fellow's Supervisor or PLP's Personnel Manager)</p> <hr/> <hr/> <hr/> <hr/>

# FIRST DAY—OVERVIEW



## Objective

*Familiarize the Fellow with work environment and individual workspace.*

## Results

*By the end of the first day:*

1. The HAR and Fellow will discuss the Division structure; visions, goals and strategic objectives; team structure, and team member roles.
2. The Fellow will have met PLP's CTO and understood the CTO role.
3. Team members will have met and welcomed the Fellow.
4. The Fellow will have access to key documents and background materials for the Scope of Work.
5. The Fellow will know how to use relevant email and telephone functions.
6. The Fellow will be oriented to the RRB (including security procedures).

## Activities

ACTIVITY	LEAD	TIME
HAR meeting-Division overview: strategic objectives, team member roles, divisional relationship to Office.	HAR	1 Hour
Supply Fellow with appropriate technical background materials-orient to key documents for Scope of Work, status reports of pending issues, USAID GH referral list, etc.	HAR or Welcome Buddy	30 Minutes
CTO meeting-explain the CTO role, relationship to Fellow, and expectations of Fellow.	CTO	30-45 Minutes
Lunch-develop relationships.	HAR, et. al.	1 Hour
Workstation orientation-using the telephone, setting up email, locating fax, printer, copier and office supplies.	Welcome Buddy	1 Hour
Building orientation-cube location, restrooms, elevators, mailroom, fire exits, security procedures, library, food court.	Welcome Buddy	1 Hour
PLP check-finalize any hiring questions and pending forms.	PLP Contact	30 Minutes

# FIRST DAY—HAR CHECKLIST



<input checked="" type="checkbox"/>	EVENT	NOTES
	Welcome Fellow to USAID	<hr/> <hr/> <hr/>
	Provide Division overview: strategic objectives, team members, relationship to Office and Bureau	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
	Supply Fellow with appropriate technical background materials	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
	Lunch	<hr/> <hr/> <hr/>
<b>ADDITIONAL NOTES</b>		
		<hr/>

# 2nd-5th DAYS—OVERVIEW



## Objectives

The Fellow will begin learning how to function effectively within the structure of USAID; learn what resources are available and where they are located; and integrate with team members.

## Results

By the end of the first week:

1. The Fellow will have a one-on-one with each SMT member and other key staff members to understand each other's roles and explore collaborative opportunities.
2. The HAR and Fellow will:
  - a. Understand their mutual expectations and work styles.
  - b. Define the first month's immediate work activities and deliverables.
3. The Fellow, with assistance from the HAR/Welcome Buddy, will:
  - a. Arrange to meet with key contacts, working groups and cooperating agencies.
  - b. Gain an understanding of priority issues related to their technical scope of work.
  - c. Understand how to use library and web-based resources.
  - d. Understand computer security and team protocol for electronic file storage.
  - e. Understand the relationship between their Division and one other Office Division.

## Activities

ACTIVITY	LEAD	TIME
HAR-Fellow meeting: unit vision and mission; expectations, work styles, activities and first month's deliverables.	HAR	2 Hours
One-on-one meetings with SMT members and other key staff.	Fellow	30 Minutes
CDIE Library orientation and online resources.	Fellow	6 Hours
<u>Arrange</u> offsite meetings with key contacts, working groups and cooperating agencies.	Fellow	2 Hours
Observe staff meeting of one other Office division	Fellow	1 Hour
Lunch with Supervisor	Sharon Rudy	1 Hour
Computer Security and electronic file storage	Welcome Buddy	30-45 Minutes
PaL-Tech Orientation	Welcome Buddy	1 Hour
Discuss relationship between Congress and USAID	Welcome Buddy	1 Hour

# 2nd-5th DAYS—REFERENCE



## Objectives

*Discuss unit's vision and mission; mutual expectations and work styles; establish Fellow's activities for 1st month, including appropriate introductions.*

## Results

At the end of this discussion you and the Fellow should arrive at a mutual understanding of the technical advisor role; create the Fellow's initial workplan and determine deliverables.

## Points to Consider

*Six basic factors affecting performance are:*

1. Job expectations
2. Performance feedback
3. Motivation
4. Management systems and leadership
5. Knowledge and skills
6. Facilities, equipment and supplies

*How does the USAID culture affect the role of a technical advisor? For example, how do the "Fellows' Guidelines" relate to this position?*

*Re work styles:*

- What is your daily work schedule? (Best available times, open door policy)
- How do you best receive and respond to information - ad hoc messages, batched messages? What is a positive way to get your attention: via email, phone, memo, in person?

*What is important this month? What are the deliverables? What may help or hinder this schedule?*

### NOTES

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# FIRST 6 WEEKS—OVERVIEW



## Objectives

Increase Fellow's exposure to USAID development strategies; expand ability to progress efficiently with responsibilities.

## Results

By the end of the first six weeks, the Fellow will:

1. Have a detailed picture of their responsibilities and priorities.
2. Meet with all relevant cooperating agencies (CA) to:
  - a. Understand their goals, objectives, and responsibilities
  - b. Define relationship
3. Make courtesy calls to Office Chief and Bureau / Mission Chief.
4. Read background technical documents.
5. Meet with relevant working groups and contacts (e.g., JPPT, Gender, FGC).
6. Complete basic USAID knowledge requirements (e.g., project management skills review, communications/presentations course).
7. Investigate professional development opportunities, including one-on-one coaching.

## Activities

ACTIVITY	LEAD	TIME
HAR-Fellow meetings: Discuss/give guidance on work in progress.	HAR and Fellow	45 min. each first 6 wks
Attend staff meetings of all Divisions in Office.	Fellow	1 Hr. each
Attend overview sessions for 3 GH Offices (other than own Office).	Fellow	1 Hr. each
Absorb content of background technical content.	Fellow	Variable
Meet counterparts in relevant CAs.	Fellow/ Welcome Buddy	1 Hr. each
Introduce self to Office & Bureau/Mission Chief (follow protocol).	Fellow with HAR guidance	15 min. each
Attend 3 select USAID courses to increase understanding of USAID environment.	Fellow, with HAR approval	6 Hrs. total



# FIRST 4 MONTHS—REFERENCE



## Objectives

*The Fellow will know what he/she needs to do and have the contacts and resources necessary to move forward.*

## Results

*Within four months, the Fellow will:*

1. Provide their first annual workplan to PLP.
2. Draft a professional development plan for the HAR's review and comment.
3. Provide final professional development plan to PLP.

## Points to Consider

- What is the long-term view?
- What do you consider the Fellow's current professional development needs? Which USAID courses / training sessions should be attended?

## Activities

ACTIVITY	LEAD	TIME
Fellow meets with PLP staff member to draft Professional Development Plan.	PLP and Fellow	1-3 Hrs.
Fellow finalizes annual workplan with HAR.	Fellow	45 Min.
Fellow finalizes professional development plan with HAR.	Fellow	30 Min.

## NOTES

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## Developing Workplans & Professional Development Plans

During orientation, PLP advises the Fellow to draft a workplan and professional development plans for review and adjustment by the HAR.

Workplans are derived from the scope of work. Good workplans contain:

- Prioritized work objectives
- Measurable and controllable indicators
- Anticipated professional meetings / TDYs
- Estimated annual leave plans
- Realistic time commitments (80-85% of time committed to work and 10% to leave. The remaining time committed to professional development)

### *Factors to review in workplans:*

- Does the Scope of Work still make sense?
  - Are major activities prioritized?
  - Has time been estimated?
  - Are deliverables clear? What does success look like?
- Are there crucial professional subscriptions or memberships?
- Which TDYs are most important? Are TDYs dependent on other factors?
- Are annual leave estimates included?
- Is there at least 5% annual time left for professional development?
- A workplan sample is available at [www.popldr.org](http://www.popldr.org) / Fellows and HARs / 360° evaluation

### *Good management of workplans includes periodic review and adjustment.*

PLP advises fellows to schedule at least quarterly progress reviews with HARs.

Professional development (PD) plans are derived from USAID fellowship standards and PLP policies. Good PD plans can include different types of activities: training workshops, ADS courses, mentor/mentee activities such as observing senior management meetings, etc.; allow 5-7% of annual time for activities (11-15 days per year); are realistic and achievable.

### *Factors to review in PD plans:*

- What is the goal and applicability of the activity?
- Is it realistic and achievable?
- Note: Samples of strong and weak PD plans are at [www.popldr.org](http://www.popldr.org)/Fellows and HARs/360° evaluation

### *Good management of PD plans includes tangible commitment to making it happen.*

Few actions motivate staff members more than demonstrating concern for their own needs and interests. Few things erode credibility faster than failing to follow through.

Note: The first annual plans are due to PLP within four months. Subsequent plans are due within four weeks of the anniversary date.