



# Onboarding Overhaul

## A Journey from Disarray to *Empowerment*

AASPA Human Capital Leadership Summit  
New Orleans, Louisiana  
December 5, 2024  
**Presenter: Laura Theiss, MSW, LSW, pHCLE**

# Getting Acquainted

The Butler County Educational Service Center HR Team



# Getting Acquainted

## The Areas we Serve

**OHIO**

17 MAR 11 1803  
THE BUCKEYE STATE

NUMBER COUNTIES: 88  
CAPITAL: COLUMBUS  
LARGEST CITY: COLUMBUS  
AREA: 44,825 SQ MI

LATITUDE: 36°N TO 41°N N  
LONGITUDE: 80°W TO 82°W W

US COUNTY

**Southwest Ohio  
Districts in Partnership  
with BCESC**

Partners in Shaping Lives.

Butler County Educational Service Center • 400 North Erie Blvd., Suite 8 • Anderson, OH 45004 • 513.233.6871 • www.bcesc.org

# Getting Acquainted

The Butler County Educational Service Center serves as a central resource for school districts and other agencies to provide educational and social service support. We build solutions for schools, families, and children to succeed.



**750 Employees**



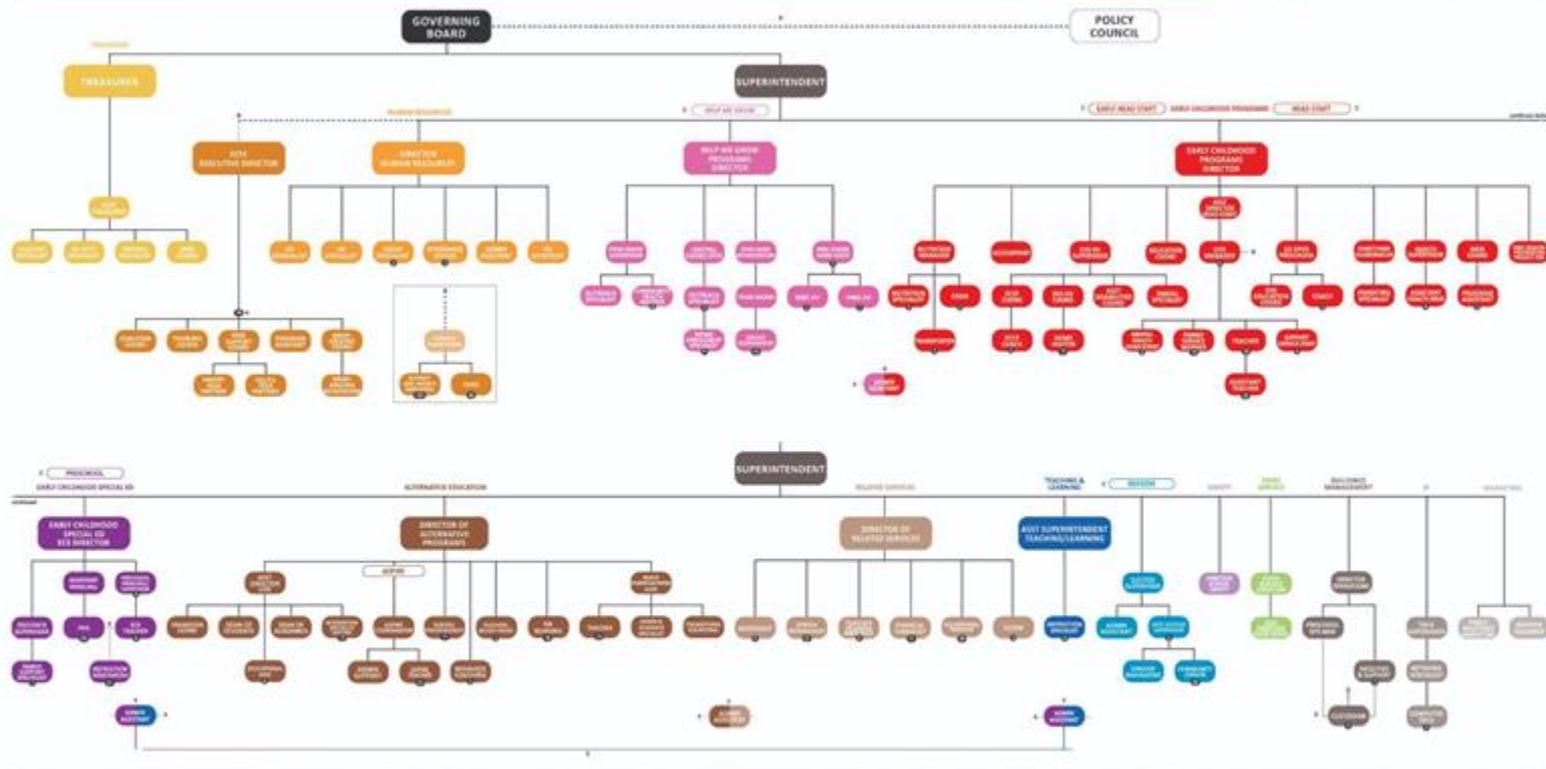
**30 Programs**

ranging from social service to  
education and prenatal  
through 12th grade



**50 Supervisors**

# BUTLER COUNTY EDUCATIONAL SERVICE CENTER



**NOTES**

- Yellow box: Staff are from existing positions and students program or separate department results. No other reporting suggested.
- Blue box: Report of responsibilities are divided in half by the agency. Area for which staff is shared in the institution and staff.
- Red box: Position is shared among all divisions. All other staff numbers include non-employment only.
- Green box: Staff who include student services.
- Grey box: Staff who include non-employment positions.



**NOTES**

- Green box: Staff who are assigned to various projects or are not currently in a position.
- Blue box: In consultation with staff in the program.
- Red box: In administrative support or shared between Early Childhood and Technical Learning.
- Yellow box: In administrative support shared by Special Ed Services, Gifted/Talented, and Special Language Services.
- Grey box: In administrative support shared by ESE and HR.
- White box: In HR support or administrative staff.



employed  
**761**  
people.

IN  
**2022**  
**BUTLER COUNTY ESC**



completed  
**15,996**  
home visits.



provided services to more than  
**55**  
school districts.



provided  
instruction to more than  
**3,650**  
alternative and  
special ed students.



saved Butler County schools  
**\$4.3**  
million.



helped support  
**637**  
home visits to reduce infant  
mortality.



**45**  
liaisons  
served

**3,925**  
students in  
the Success  
program.

navigated  
**182**  
families and  
**316**  
children  
through  
kinship care  
resources.



facilitated more than  
**7,275**  
hours of coaching,  
curriculum support  
and professional development.



served  
**1,833**  
Early Head Start,  
Head Start,  
and preschool students.



processed  
**10,250**  
early childhood  
program calls and referrals  
for 9 ohio counties.



provided  
**950**  
certified substitute  
teachers to 22 districts.



**10**  
YEARS



400 North Erie Blvd., Suite A • Hamilton, OH 45011  
(513) 887-3710 • [www.bcesc.org](http://www.bcesc.org)



operated  
**65**  
preschool classrooms  
in 3 counties.



# Background - Onboarding Process January 2024

- No Guidance to Supervisors
- Large Degrees of Variation in Current Onboarding
- Time of Hire Impacts Experience
- Exit Interview Data says this is an area for Improvement
- Employees not Prepared
- Opportunity to use Research
- High Turnover of Staff within the First Year of Hire

**We Need an Onboarding Overhaul!**

# Project Alignment with eHCLE Standards



## Strategy Standard #1: Talent Development - Orientation and Onboarding

- Assessing the diverse needs of new employees and using the data to inform the design of the onboarding framework
- Develop support structures for employees who are new to a role

## Strategy Standard #2: Process Management

- Champion the change management process

## Strategy Standard #3: Experience Management

- Evaluate employee and customer experience

**“Onboarding is a Journey – a foundational part of your employee experience. It’s about fulfilling the promises you made during recruitment and preparing employees to be high performers.”**

*- Gallup*

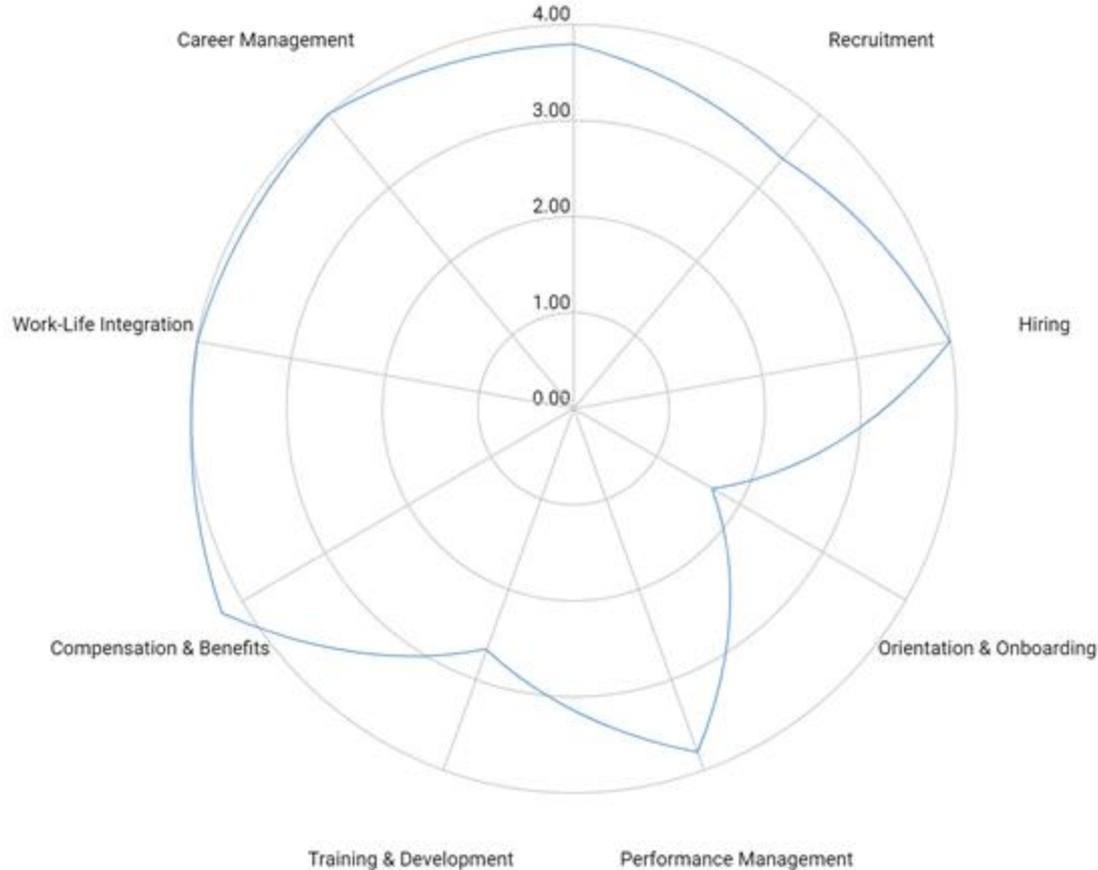
# Theory Of Practice

If we implement a more intentional onboarding experience, then supervisors across the agency will provide a more meaningful onboarding experience, staff will be prepared to do their jobs, and employee retention beyond the first year will increase by 10% over a three year period.

## 2024 TIMELINE



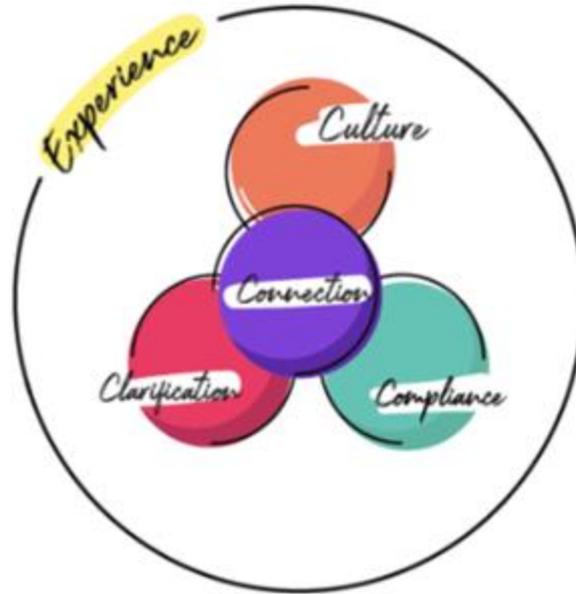
# Organizational Assessment



# 4 C's of Onboarding

**Compliance** - ensuring new employees understand workplace policies and procedures; completing paperwork and training required by law

**Culture** - helping new employees understand workplace norms, unwritten rules and how people work together

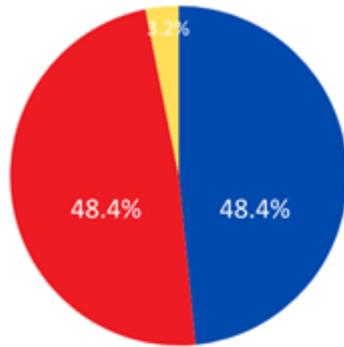


**Clarification** - ensuring new employees understand the requirements of their job and other performance expectations; providing employees with the tools and resources needed for their work

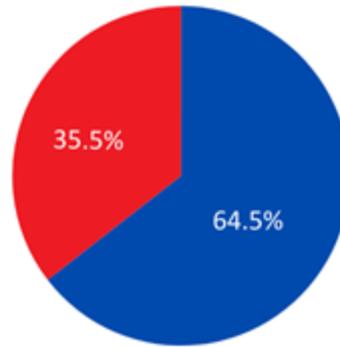
**Connection** - fostering a sense of belonging by cultivating relationships and connecting new employees to formal and informal networks

# Supervisor Survey

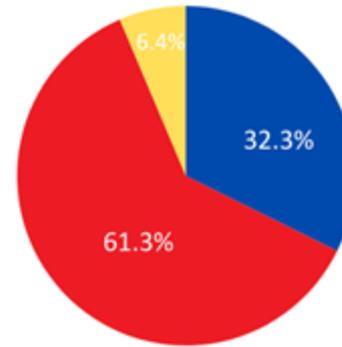
**Supervisor's Report:** Do you believe your current onboarding practice gives staff the training they need to be successful in the...



**First Week**



**First Month**



**First Year**

■ Yes ■ Somewhat ■ No

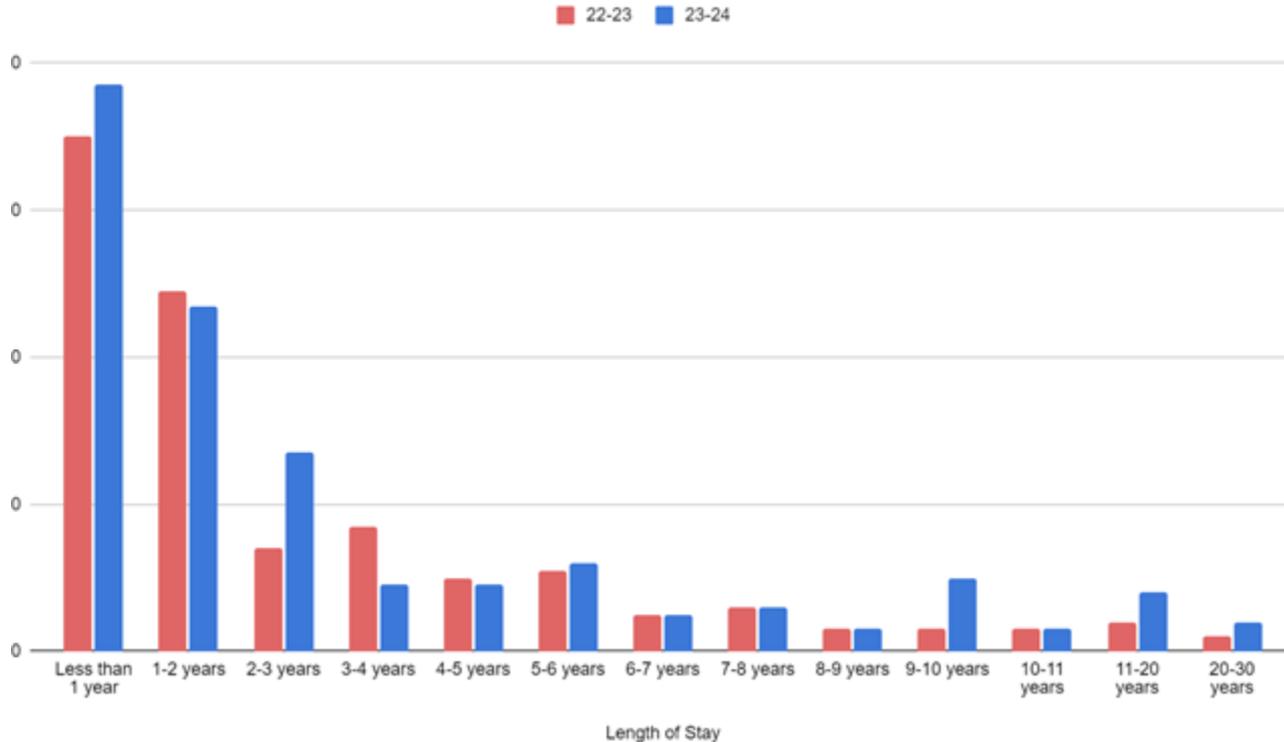
# Supervisor Survey



- “We do okay now but we know there is room for improvement.”
- “Quality onboarding with the high turnover was extremely difficult.”
- “After one month, my process seems to drop off. Would be nice to have a 1, 2, 3 month formal check-in.”

# Employee Turnover

## Staff Turnover Numbers by Length of Stay



# 1st Draft - Checklist



## Focus

- Items to Include
- How to Organize
- Functionality
- Reflection Questions

### **Training Map - Add position name here**

Compliance - Clarification - Culture - Connection

#### Reflection Questions

#### First Day - Welcome and Introduction to the ESC

- Confirm Hire Details
  - HR Orientation if not completed prior to day 1 - Review employee forms including contract, mileage form, pay dates.
  - Review Job Description
- Get familiar with building and staff
  - Meet with supervisor
  - Take a Building tour
  - Introduce to team, key people
- Logistics for success
  - Set up weekly check ins for the first month
  - Receive computer and ensure you can login and access email/google, ensure access to shared drives

#### First Week - Introduction to department and job duties

- Understand connection to BCESC
  - Review mission and vision of the BCESC
  - Discuss important standing meetings and dates, department processes
  - Show organizational chart and explanation of programs
  - Discussion of agency and department culture and professionalism, attendance expectations,
- Logistics for Success
  - Set up email signature
  - Organize your space and get comfortable - let us know if you need additional resources, materials or supplies (we will get you the things you need to do your job)
  - Review systems used by your department/program, ensure you can access them, get familiar with navigating and using them
  - Assign a Mentor
- Training for Position

# Pilot Project



## Focus

- Preschool Intervention Specialist and Instructional Assistants
- Position Specific Training
- Organization and Pacing
- Incorporation of 4 C's
- Onboarding Experience

# Pilot Project

INTEGRITY  
FAMILY-FOCUSED

Early  
Childhood  
Programs

COMPASSION  
RESPECT

## Early Childhood Programs New Preschool Staff Checklist

Name: \_\_\_\_\_ Building: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

*\*Supervisors- complete with staff within 30 days of employment date, including all sections with other component staff.*

### First Day: Welcome to the Butler County ESC:

- Meet with HR to complete HR Orientation (review contract, pay dates, job description, etc.)
- Preschool Building Basics
  - Tour the building with Supervisor
  - Introduce to staff
  - Review preschool calendar and work schedule
  - Classroom Procedures: Pick-up/Drop off, cleaning schedule, daily classroom routine
- Active Supervision Introduction/Training
  - Staff to student ratio
  - Transitions
  - Importance of Counting and Communication

### \*\*CERTIFIED STAFF ONLY

- Intro to Professional Development/LPDC/Coaching
  - Have the "leaving a LPDC district form" completed from former district
  - Provide link to professional opportunities page (*register for LPDC training to have access to PD Toolbox*)

### Week 1: Getting Started - Introduction to Department and Job duties

#### Understand the connection to the BCESC

- Review mission and vision of the BCESC
- Show organizational chart and explanation of programs
- Share Preschool ECE/SE Google Calendar and Building Google Calendar
  - Discuss staff meetings and dates, department processes, and long term goals of the department
- Discussion of agency and department culture and professionalism, attendance expectations

#### Logistics for success

- Log in to OCCRFA and ensure you are connected to your building
  - Update education information in profile. Upload college transcripts if applicable
- Set up weekly check ins with your Supervisor for the first month
  - Receive technology and ensure you can login and access email/google, ensure access to shared drives
    - Set up email signature
    - Check your email
  - Organize your space and get comfortable
  - Review platforms that are used frequently in preschool (TSG, lesson plans/curriculum, Brigrance, ChildPlus, Class Dojo, etc.)
  - Complete forms for site

#### Training for position

- Review the Preschool Team Action Plan with your co-teacher
- Active Supervision
- Student Attendance, Meal Counts and Meal Service
- Review this month's Monthly Teacher Reminders
- Start Public School Works Training - **complete medication training first and review with school nurse**
- Job Shadowing Opportunities
- Review best practices for my role

#### Building positive relationships

- Welcome letter introducing new staff member to families
- Build positive relationships with staff and families
  - Home visits: home visit form & child interest form (30 min. or less at their home)
  - Confidentiality
- Work together with co-teacher to review/update the classroom action plan
- Review attendance expectations and appropriate uses of leave
- Check in - Clarifying Questions

# Pilot Project

## Reflection Questions

**Purpose:** Relationship Building, Assessing Progress, Training

**Week 1** - Compliance & Clarification

**Week 2** - Culture / Big Picture

**Week 3** - Culture / Connection / Understanding the Why

**Week 4** - Connection / Impact

# The Roll Out Plan



## Focus

- Meet in Small Groups
- Provide Training on 4C's
- Complete 4C's Assessment
- Identify Areas of Improvement
- Empower Supervisors
- Focus on Functionality
- Work on Pre-boarding experience developing materials that will help all departments

## 4Cs Assessment Sample

### COMPLIANCE

Ensuring new employees understand workplace policies and procedures. Completing paperwork and training required by law.

Step 1: Who is currently responsible for each onboarding activity? Mark "N/A" for any activities that do not apply or are not currently part of your onboarding program.

Onboarding Activity/Information	CURRENT STATE					N/A
	Human Resources	Hiring Manager	Orientatio n	New Employee	Other	
Complete tax paperwork						
Salary schedule/Step increases						
Sign up for benefits						
Direct deposit						
Dress code policy						
Workplace safety/Emergency procedures						
Mandatory training						
Time off policies						
Employee handbook						
Social media guidelines						
Technology acceptable use guidelines						
Professional conduct standards						
Progressive discipline policy						
Transportation/Parking						
Printing procedures						
Ordering supplies						
Building keys/access codes						
Badge/School ID						



# Pre-boarding Materials



## Welcome -to the- Team!

Dear (Name here),

Welcome to the Team! We are thrilled to have you join us at the BCESC, where our employees are truly our most valuable asset. As a people-serving organization, your contributions will make all the difference, and we're excited to see the impact you'll have.

Onboarding at the BCESC is more than just an introduction, it's a journey designed to help you feel fully integrated into your role and our organization. Our comprehensive onboarding process provides the training, resources, and support you need to become a productive and engaged member of the team.

Over the coming days, weeks, and months, you'll go through various steps in this process to ensure a smooth transition into your new role. While every position has its unique path, all onboarding programs are built around the 4 C's:

- **Compliance** - Understanding workplace policies, completing necessary paperwork, and fulfilling any legal requirements through mandatory training.
- **Clarification** - Gaining clarity on your job expectations and responsibilities, as well as receiving the tools and resources you need to succeed.
- **Culture** - Immersing yourself in our workplace norms, the ways we collaborate, and the unspoken rules that help us work together seamlessly.
- **Connection** - Building meaningful relationships with colleagues and connecting to both formal and informal networks that foster a sense of belonging.

In the accompanying packet, you'll find more detailed information about each phase of your onboarding experience. Our goal is to make this journey as smooth and enriching as possible for you. If you have any questions, or if there's anything we can do to support you, don't hesitate to reach out to our HR team or your supervisor.

Once again, welcome to the BCESC! We're excited to have you on board and look forward to the great work we'll accomplish together.

Sincerely,

Laura Thelms  
Human Resources Director



Butler County  
Educational Service Center

## MISSION AND VISION



### Mission

Through relationships we provide exemplary services to students and families that improve learning so children can lead successful lives.

### Vision

We are a progressive, visionary, premier, inclusive organization that supports world-class learning through leadership and collaboration.



Partners in Shaping Lives.



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# Implementation

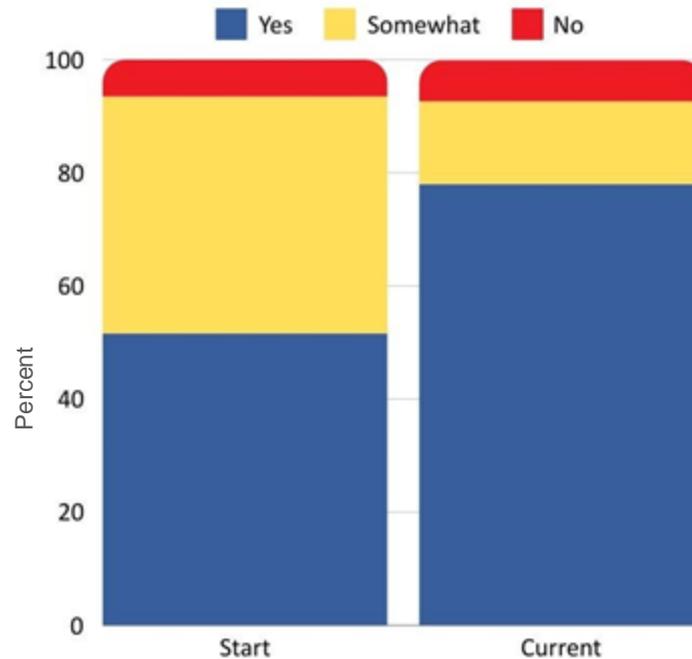


## Focus On...

- Binders
- Google Classroom
- Checklists in Google
- Paper Packets

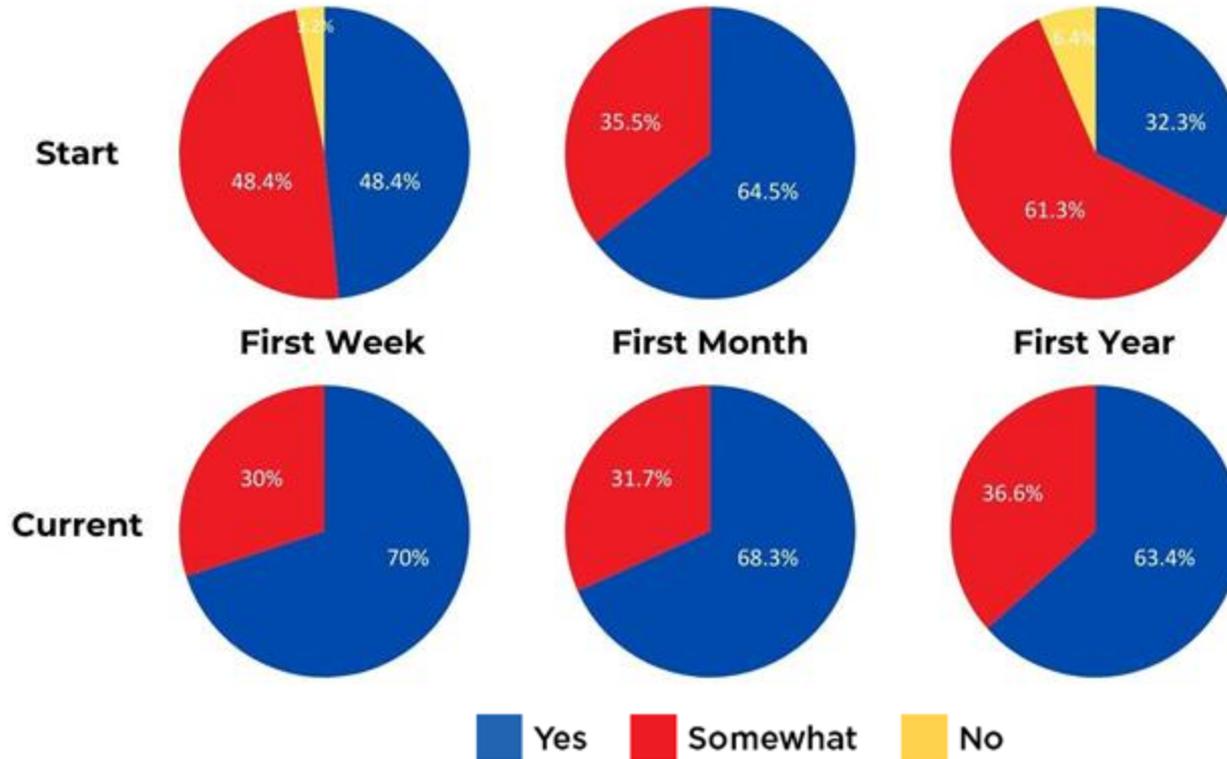
# Initial Supervisor Feedback

Do you have an onboarding process?



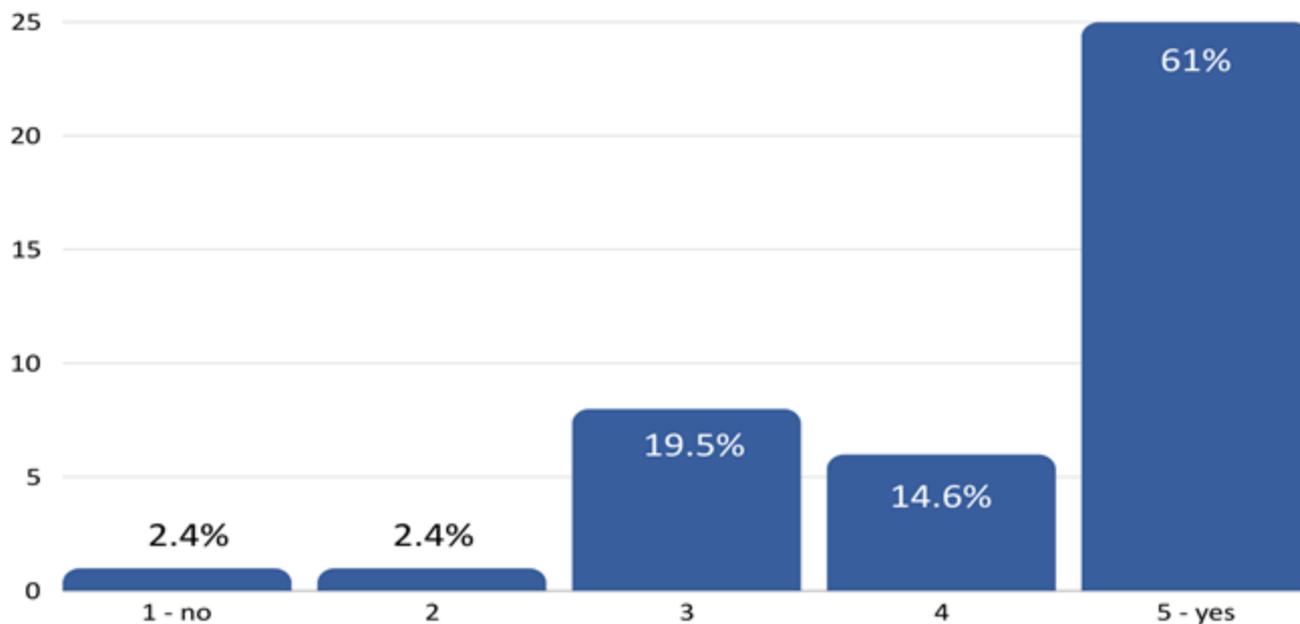
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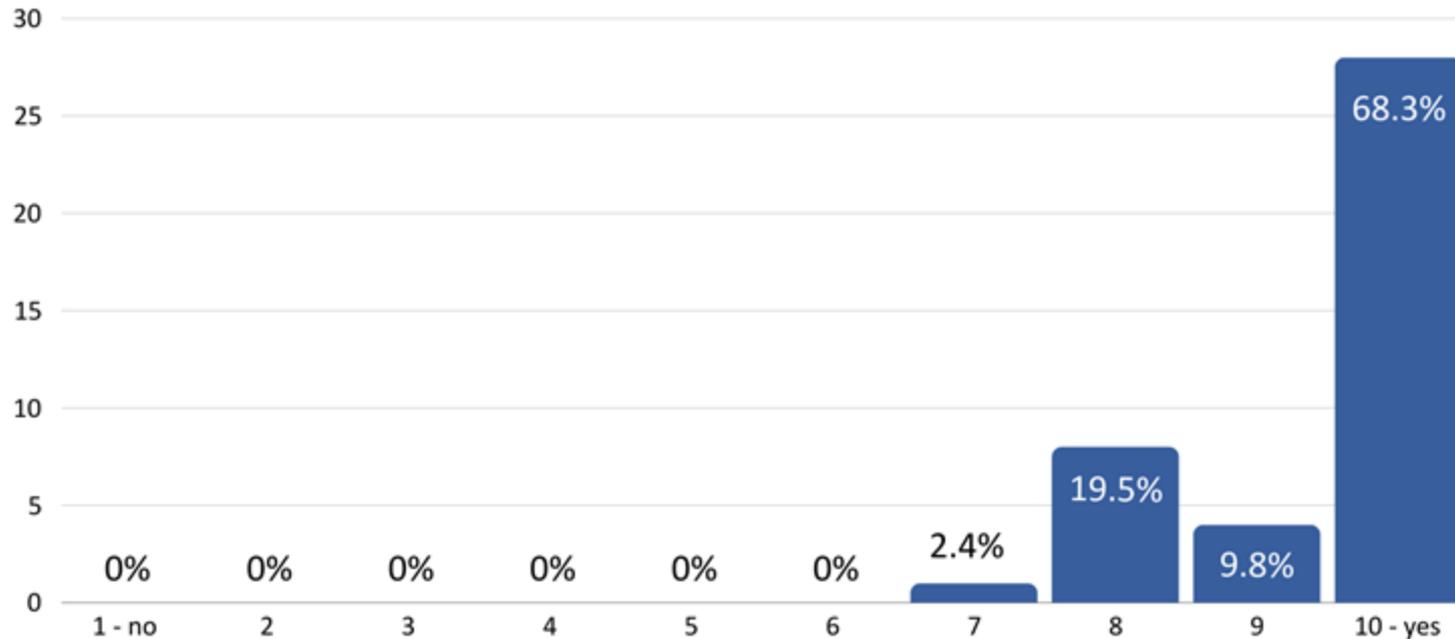
# Initial Employee Feedback

The onboarding process has prepared me well to do my job.



# Initial Employee Feedback

How likely are you to recommend a friend or family member seek employment at the BCESC?



# Initial Impact



- Checklist and Timelines
- Mentorship and Shadowing
- Welcome Materials
- Standardization and Updates
- Intentional Check-Ins
- Cultural Integration



- “As a new staff member I think the process has been great!”
- “We are excited to continue to develop our onboarding process and materials. We hope to continue to improve it over time as well.”
- “Thanks for your help with this project!”

# Check Progress, Plan Next Steps

- Supervisors Progress
- Guide Supervisors through Improvement Process
- Review Data and Apply Lessons
- Initial Focus was on Pre-boarding and Onboarding,

How do we expand this?

# Review - Our Starting Point



**Nothing**

Individually Developed  
Training Plans

## **Training Map - Add position name here**

Compliance - Clarification - Culture - Connection

### Reflection Questions

#### First Day - Welcome and Introduction to the ESC

- o Confirm Hire Details
  - o HR Orientation if not completed prior to day 1 - Review employee forms including contract, mileage form, pay dates.
  - o Review Job Description
- o Get familiar with building and staff
  - o Meet with supervisor
  - o Take a Building tour
  - o Introduce to team, key people
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  - o Set up weekly check ins for the first month
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  - o Review systems used by your department/program, ensure you can access them, get familiar with navigating and using them
  - o Assign a Mentor
- o Training for Position

# Review - Our Progress



**Butler County Educational Service Center**  
**EARLY CHILDHOOD PROGRAMS**  
New Preschool Staff Checklist

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**WELCOME TO THE**  
**Butler County Educational Service Center**

Name: \_\_\_\_\_ Building: \_\_\_\_\_  
Date of Hire: \_\_\_\_\_



**Goals for My First Day**

- Complete all Orientation to receive contract, any other job descriptions, etc.
- Meet the building with supervisor
- Introduce to staff
- Review preschool calendar and work schedule
- Classroom Procedures, Pick-up/drop-off, cleaning, etc. (if applicable, early response protocol)
- Meet to discuss roles
- Transition
- Importance of Learning and Communication

**Welcome to the Team!**

**Dear New Hire,**

Welcome to the Butler County Educational Service Center (BCEC), where our employees are the heart of our mission. As a person joining our organization, your contribution will make all the difference, and we're excited to see the impact you'll make.

Working at the BCEC is more than just an introduction; it's a journey that leads you to the heart of our organization, where we work together to provide exceptional educational experiences for our students. Your commitment and passion are the foundation of our success, and we're excited to have you as a valuable member of our team.

Here are some key areas and resources you'll find helpful as you get started:

- **Orientation:** Understanding our organizational structure, including necessary paperwork, and getting familiar with our facilities through mandatory training.
- **Classroom:** Learning about our current classroom requirements, as well as reviewing the daily schedule and procedures.
- **Support:** Identifying key staff members, including our support staff, and understanding the various roles and responsibilities within our organization.
- **Communication:** Establishing clear lines of communication and understanding the importance of effective communication in our organization.

If you have any questions, please don't hesitate to reach out to your building supervisor. Our goal is to make the transition as smooth and welcoming as possible for you. If you have any questions, at Butler County Educational Service Center, we're committed to making sure you'll have a great experience.

Once again, welcome to the BCEC! We're excited to have you on board and look forward to the great work we'll accomplish together.

Sincerely,

**Lauree Peltz**  
Human Resources Director



**Butler County Educational Service Center**

**MISSION AND VISION**

**Mission**

Through relationships we provide exemplary services to students and families that improve learning so children can lead successful lives.

**Vision**

We are a progressive, visionary, premier, inclusive organization that supports world-class learning through leadership and collaboration.



Partners in Shaping Lives



# Discussion - Impact

- Agency Wide Pre-boarding
- Personalized onboarding include 4C's
- Trained and Empowered Supervisors
- Reflective Questions for Check-ins
- Systematic Approach for Process Improvement
- Social Media Guidelines
- How to Get Involved
- Get to Know You

# Discussion - Limitations

- More clear Data Collection Plan
- Collect more Data from Employees
- Employee Response Rate for Recent Onboarding Survey
- Research and Develop Guidance earlier in the Process

# Next Steps

- Relate this Work to Stay Interviews
- Build in Everboarding Concepts
- Continue to Support Supervisor Approach for Staff Engagement

# Journey Summary

Overall the BCESC has a more intentional and comprehensive approach to onboarding and we hope to see the impact in a reduction of employee turnover during their first year. We will continue to track this metric and use the data to drive our decisions.

# Q & A



## Contact Info

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### References

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