Onboarding Overhaul

A Journey from Disarray to *Empowerment*

AASPA Human Capital Leadership Summit
New Orleans, Louisiana
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Getting Acquainted
The Butler County Educational Service Center HR Team

Getting Acquainted
The Areas we Serve

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.
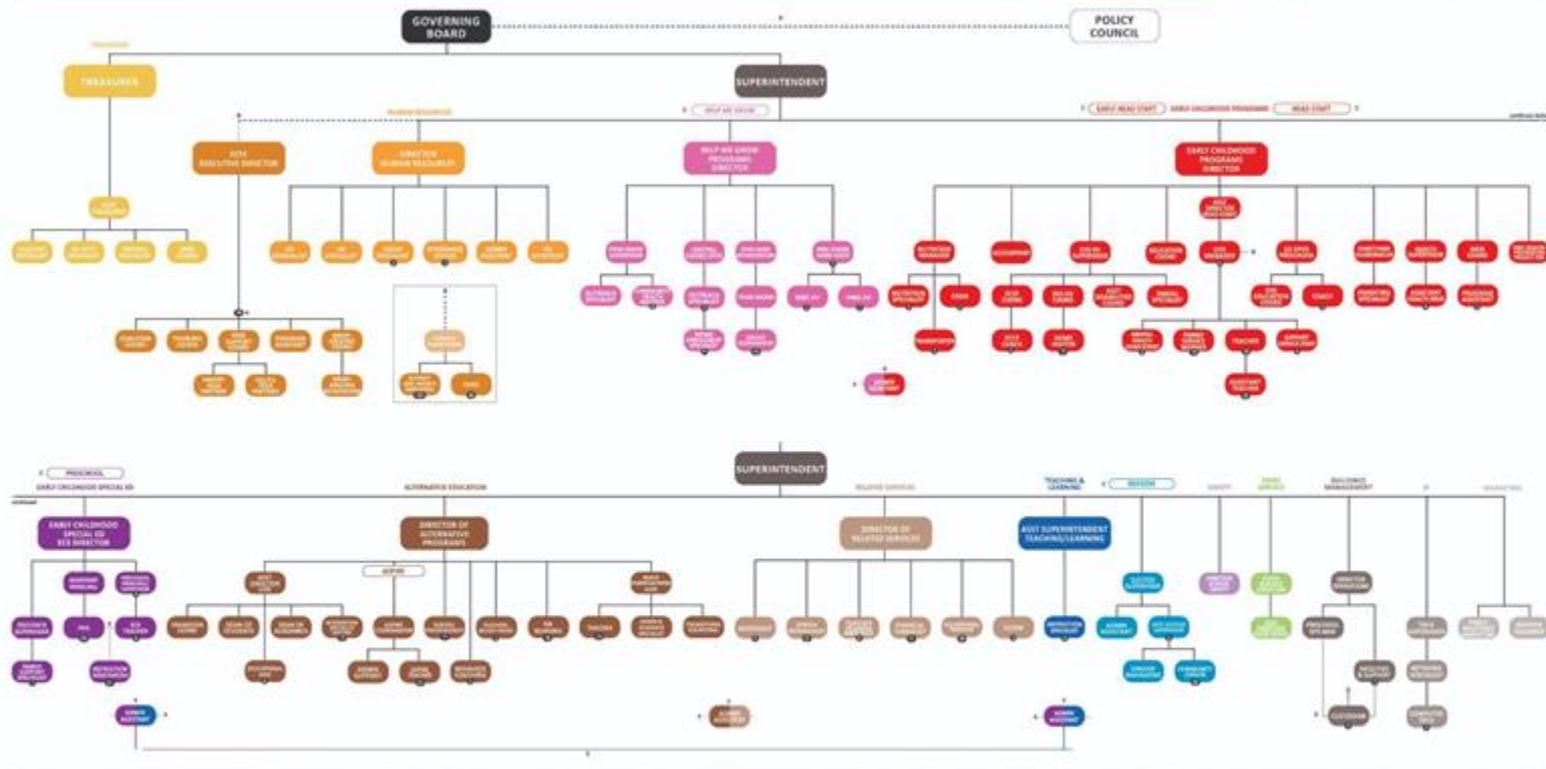
750 Employees

30 Programs

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

50 Supervisors

Butler County Educational Service Center • 400 North Erie Blvd., Suite A • Hamilton, OH 45011 • (513) 887-3710 • www.bcesc.org

IN 2022 BUTLER COUNTY ESC

employed **761** people.

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

Butler County **Educational Service Center**
Partners in Shaping Lives

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

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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."
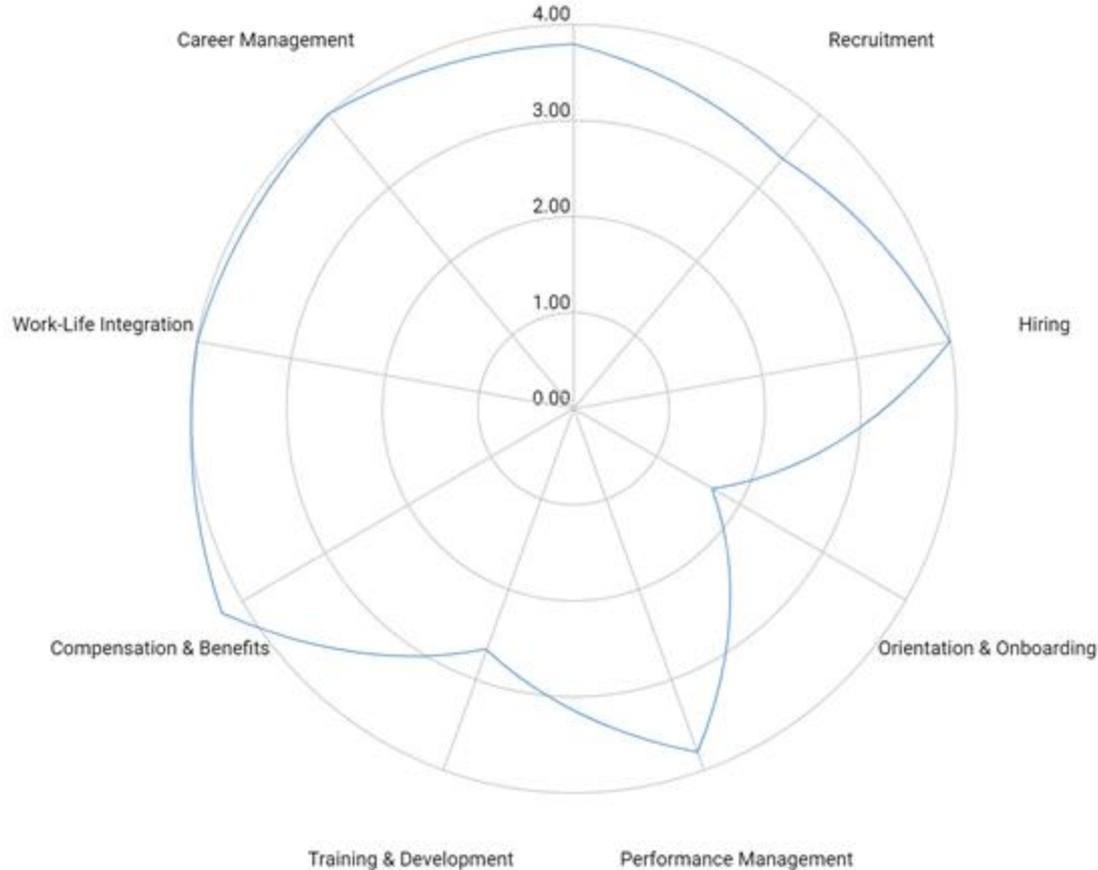
- Gallup

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

Project Inception and Leadership Buy In	**1**	JANUARY
FEB-MAR	**2**	Research Onboarding Best Practices
Survey Supervisors and Gather Turnover Data	**3**	APRIL/MAY
JUNE	**4**	1st Draft of Onboarding Template
Pilot Project with Preschool Special Education team	**5**	JULY
JULY	**6**	Met with Vision Team regarding agency roll out
Meetings with Department Supervisors	**7**	AUG-OCT
AUG-OCT	**8**	Develop Pre-Boarding Materials
Implement Onboarding Practices	**9**	AUG-OCT
OCTOBER	**10**	Gather Employee Feedback
Feedback Review and Process Improvements	**11**	NOVEMBER
DECEMBER	**12**	Repeat PDCA, Expand Progress

Butler County Educational Service Center
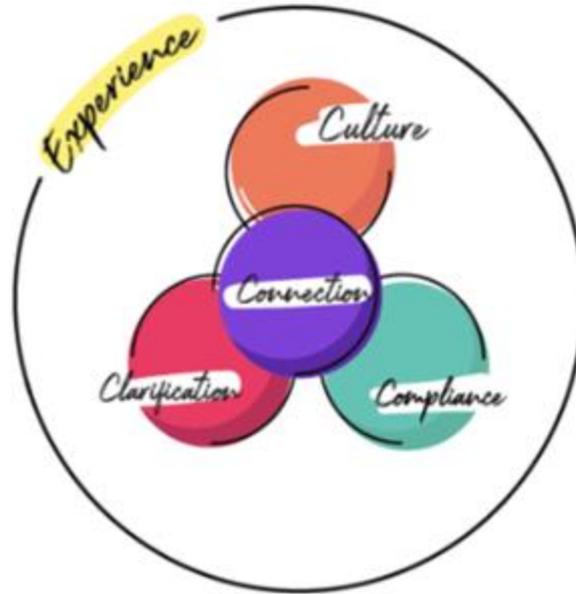Partners in Shaping Lives

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
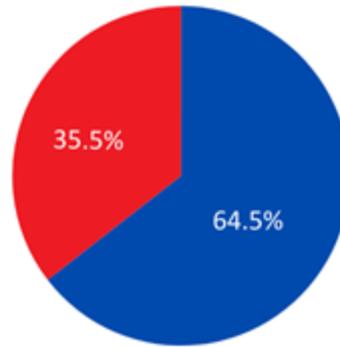
Connection - fostering a sense of belonging by cultivating relationships and connecting new employees to formal and informal networks
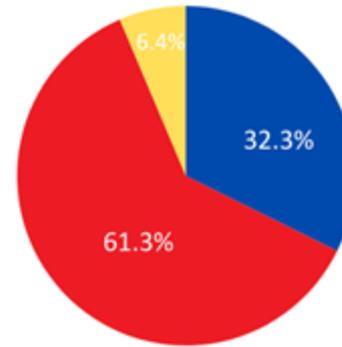
Bauer, 2010

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 — 48.4% / 48.4% / 3.2%

First Month — 64.5% / 35.5%

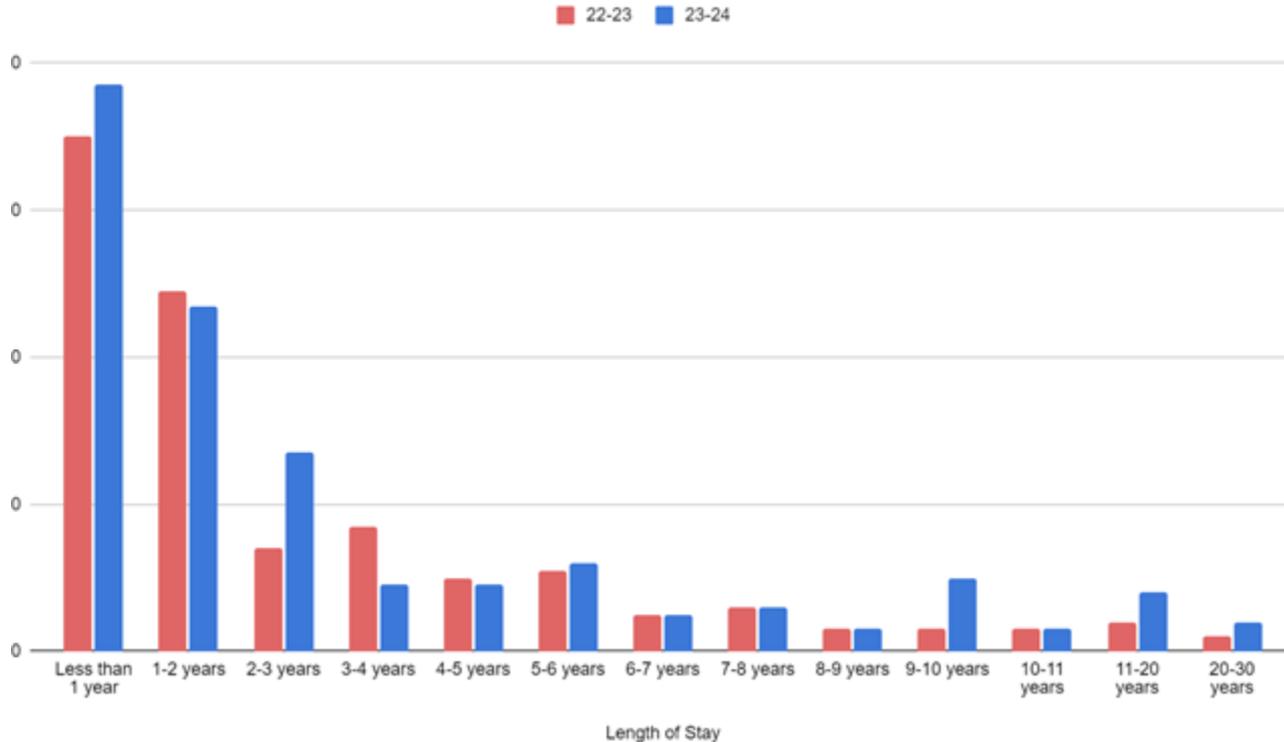**First Year** — 32.3% / 61.3% / 6.4%
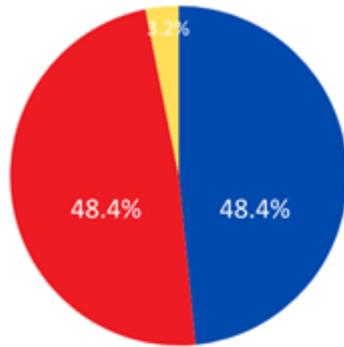
Yes | Somewhat | No

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

Early Childhood Programs
New Preschool Staff Checklist

INTEGRITY
FAMILY-FOCUSED
COMPASSION
RESPECT

Early Childhood Programs

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 OCCRRA 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, Brigance, 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

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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.

Onboarding Activity/Information	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.					
	CURRENT STATE					
	Human Resources	Hiring Manager	Orientation	New Employee	Other	N/A
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						

Department Meetings

Focus

- Reflect on Self Assessments
- Identify Areas for Improvement
- Useful
- Pacing
- Organization
- Method
- Reflection Questions & Check-in Guidance

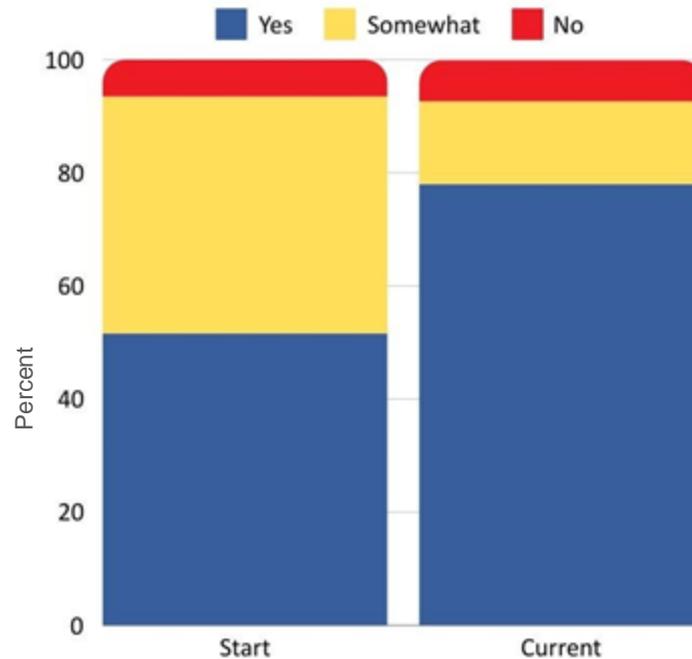# Pre-boarding Materials

Implementation

Focus On...

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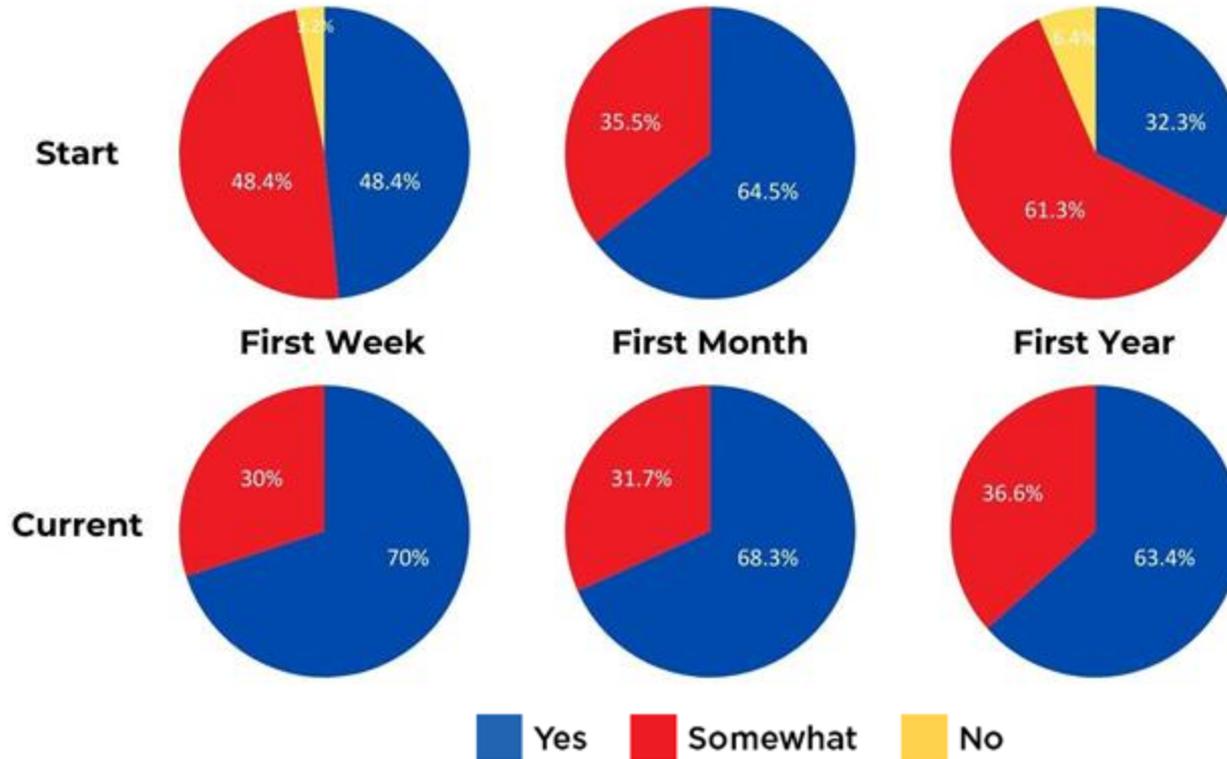- Google Classroom
- Checklists in Google
- Paper Packets

Initial Supervisor Feedback
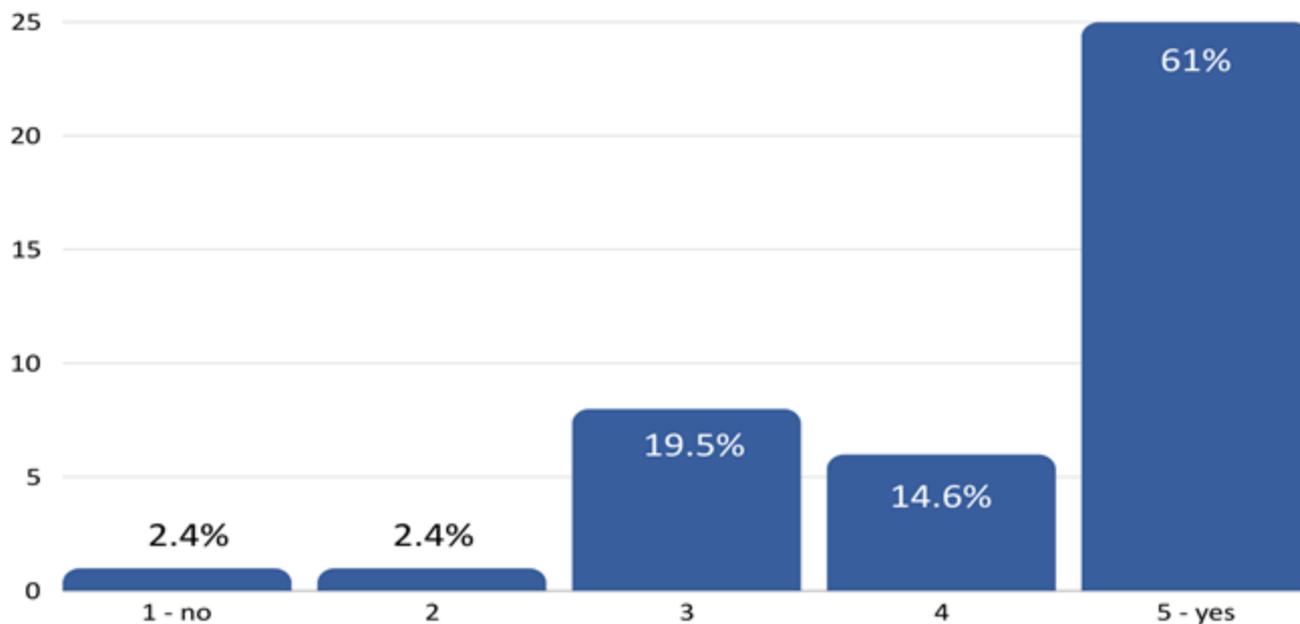
Do you have an onboarding process?

Initial Supervisor Feedback

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

Start

First Week
- 48.4% Somewhat
- 48.4% Yes
- 3.2% No

First Month
- 35.5% Somewhat
- 64.5% Yes

First Year
- 32.3% Yes
- 61.3% Somewhat
- 6.4% No

Current

First Week
- 30% Somewhat
- 70% Yes

First Month
- 31.7% Somewhat
- 68.3% Yes

First Year
- 36.6% Somewhat
- 63.4% Yes

■ Yes ■ Somewhat ■ No

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?
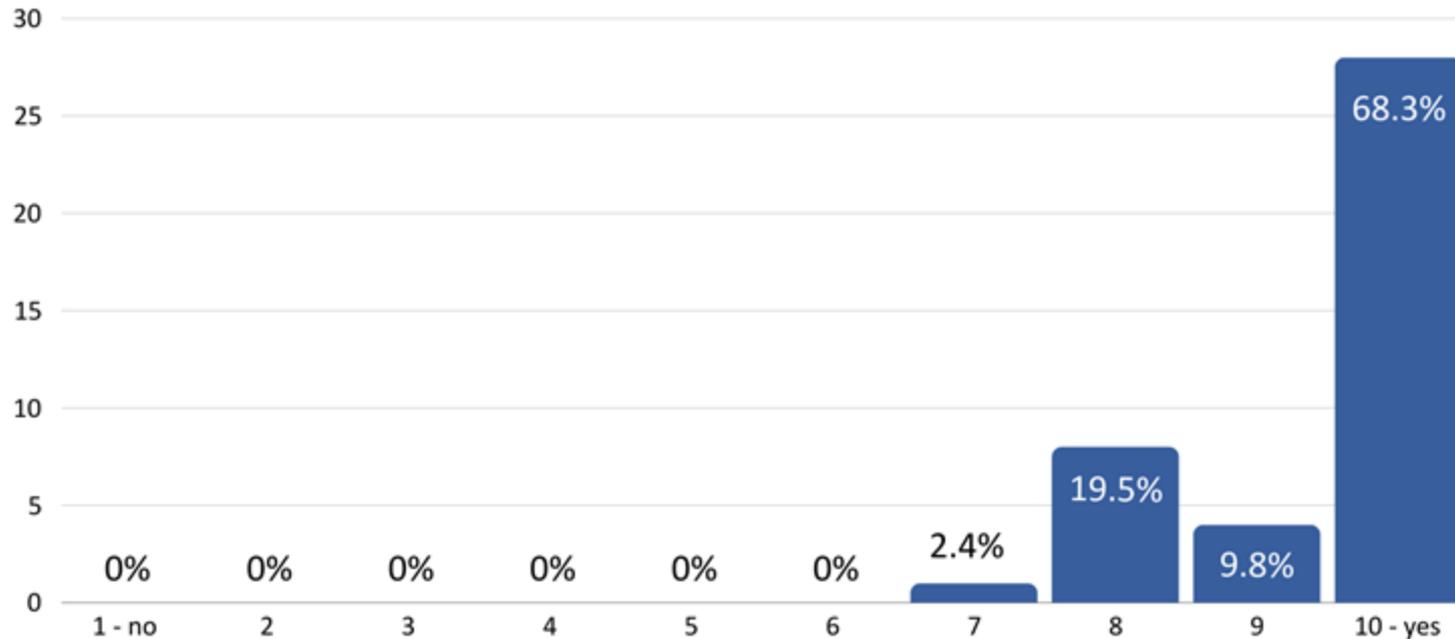
Initial Impact

- 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!"

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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

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- ○ Confirm Hire Details
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  - ○ 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

Review - Our Progress

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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Gallup. (n.d.). *Why the onboarding experience is key for retention.* Gallup Blog. https://www.gallup.com/workplace/235121/why-onboarding-experience-key-retention.aspx

Tsipursky, G. (2023). *A guide to onboarding new hires (for first-time managers).* Harvard Business Review. https://hbr.org/2023/07/a-guide-to-onboarding-new-hires-for-first-time-managers