

# Onboarding New Staff Members & Creating an Orientation Handbook

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# A Few Reminders...

- You decided to hire this employee. Honor your decision and nurture your new hire.
- Orienting and onboarding are forms of teaching.
- The “right” way to onboard is whatever way helps your school achieve its goals.

# A day in the life of a new hire...

Step 1: Arrive for the first day. Someone in the main office hands you a set of keys and walks you to the HR department.

Step 2: For the next 30 minutes, the HR manager helps you get withholdings in order, signs you up for Paylocity, and talks through benefits policies.

Step 3: You return to the main office where your new boss spends about an hour doing more administrative tasks like getting your work email set up and having you sign policy agreements. Your boss gets interrupted once or twice while you're working with them.

Step 4: Your new boss instructs you to complete a 2 hour orientation module that covers policies and expectations.

Step 5: Once you're done with the module, you get a quick (about 20 minutes) tour of the workplace

Step 6: For the rest of the day, it's time to head to your new classroom and get to work!

What did the employee learn about their new role?

# A day in the life of a new hire...

Step 1: Arrive for the first day. Someone in the main office hands you a set of keys and walks you to the HR department.

Step 2: The HR manager helps you get withholdings in order, signs you up for Paylocity, and talks through benefits policies.

Step 3: Return to the main office where your new boss performs more administrative tasks like getting your work email set up and having you sign policy acknowledgements.

Step 4: Your new boss then instructs you to complete a 2 hour orientation module that covers policies and expectations.

Step 5: Once you're done with the module, you get a quick tour of the center.

Step 6: If the day isn't over by now, it's time to head to your new classroom and get to work!

**This is Orientation...  
Not Onboarding.**

# Objectives

1. Identify the core characteristics of a successful orientation and onboarding process
2. Discuss time management & organizational strategies for orienting & onboarding
3. Assess current onboarding strategies alongside recommended practices
4. Workshop onboarding manuals and procedures

# Orientation vs Onboarding: What's the difference?

Objective 1: Identify the core characteristics of a successful orientation and onboarding process

**Orientation:** the initial welcome and introduction to the organization and its structures

- New Hire Paperwork
- Benefits Enrollment
- Payroll Setup
- Technology Setup
- Meeting Supervisors & Support Personnel
- Reviewing “Need to Know” Information

**Vs.**

**Onboarding:** integrating the employee into the social & performance parts of the job

- Campus/Facility Tours
- Meeting Mentors & Co-workers
- Initial Professional Development
- “Learning the Ropes”



# Orientation

# Orientation...

The initial welcome and introduction to the organization and its structures

- New Hire Paperwork
- Benefits Enrollment
- Payroll Setup
- Technology Setup
- Meeting Supervisors & Support Personnel
- Reviewing “Need to Know” Information

- Requires employer preparation
- (Informally) begins as soon as the employee accepts the position
- Often more logistical, streamlined, and administrative focused than onboarding

# To Review at Orientation...Right?

- Program Orientation/Values
- Line of Authority
- Resources & Apps
- Time Clock & Time Card Procedures
- Rules for Attendance
- Call-in Procedures
- Scheduling
- Dress Code
- Confidentiality Policy
- Parent Communication Policy
- Gossip Policy
- Discipline Policy
- Supervision Policy
- Personal Health & Safety Practices
- Classroom & Center Cleanliness
- Emergency Procedures
- Allergic Reaction Procedures
- Emergency Prevention Practices
- Licensing Regulations
- Classroom Practices
- Curriculum Expectations
- Playground Expectations
- Classroom Management Expectations
- Field Trips
- Special Events & Traditions
- Tour of School

# Strategy 1: Orientation as a Story

## **This is who you work for...**

- Tour of School
- Program History or Structure
- Program Mission/Values
- Line of Authority

## **This is when you will work for us...**

- Scheduling
- Time & Time Off Procedures
- Call-in Procedures

## **This is what you'll do....**

- Teaching Expectations
- General Health & Safety Practices (including VIRTUS)
- Emergency Procedures

## **This is how you should do it...**

- Curriculum Expectations
- Discipline Policy
- Classroom / School Practices
- Special Events or Other Info

Objective 2: Discuss time management & organizational strategies for orienting & onboarding

# Strategy 2: Streamline through Action Lists

Updated 8/24

### HTEEC Employee Onboarding Requirements

Prior to First Day of Employment	
Application for Employment - Must include 3 professional references - Must include dates/location of previous experience, especially in licensed child care - Copy of transcript strongly encouraged for individuals w/ degree in early education or a related field.	
Register for/attend MBTUS training session Q2. Provide documentation of previous training.	
Employer adds employee to QIARS system	
Complete Waiver for KBI Background Check & Obtain Fingerprints - Email sent from KDEE or KBI with instructions for completion	

Within 7 Days of Employment	
(Within 3 Days) Onboarding with Parish Accountant	
Program Orientation	
Set up School E-Mail: _____@holymtrinitycc.org	
Set up School ParentSquare account	
Acknowledgment of Discipline Policy	
Acknowledgment of Employee Handbook	

Within 30 Days of Employment	
Health Status Form	
Documentation of negative TB test* - Previous results of testing obtained no more than 2 yrs. prior to employment allowed	
Pediatric/Adult CPR & First Aid Certification*	
Child Abuse & Neglect Training: Completed in-house	
Child Development Training: Completed in-house	
Health & Safety Training: Completed in-house - Module 1: Infectious Disease Control/Signs & Symptoms of Illness/Handling & Storage of Hazardous Materials/Food Safety & Allergic Reactions/Medication Administration - Module 2: Building & Fire/First Aid/Emergency Preparedness/Child Transportation/Safe Sleep SIDS	1. 2.

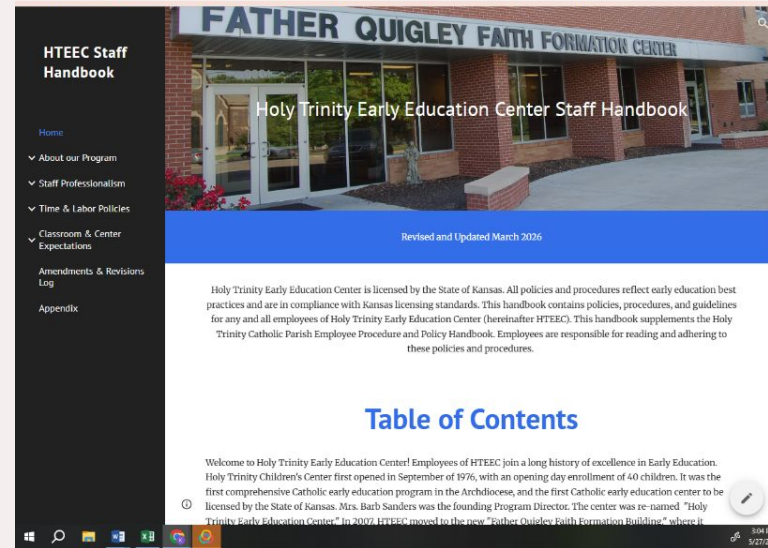
\*Reimbursed or paid for by HTEEC with proper documentation/receipts. See Program Director for details.

- “Action lists” set out the who, what and when of orientation tasks.
- Action lists help both the employer and employee stay on track and on time.
- Action lists ensure every employee is orientated in the same way

# Strategy 3: (Occasionally) Combine Orientation & Onboarding Tasks

Ideas include...

- Embedding digital documents onto communication or tech platforms
- Interviewing veteran co-workers about policies and procedures
- Informally model processes during tours or observations-make the employee an active participant



Objective 2: Discuss time management & organizational strategies for orienting & onboarding

# Onboarding

# Onboarding...

Integrating the employee into the social & performance parts of the job

- Campus/Facility Tours
- Meeting Mentors & Co-workers
- Initial Professional Development
- “Learning the Ropes”

- Onboarding “fills in the gaps” of orientation
- Onboarding is less hands on for the supervisor and support staff
- Onboarding happens formally and informally over an extended period of time- sometimes, up to a year.

# Onboarding Consists of...

- Having the employee use the information learned during orientation to guide their on-the-job decisions
- Building a positive relationship and rapport with the new employee
- Establishing mentorships with veteran co-workers
- Integrating the employee into the school's culture
- Filling in the gaps of the employee's education or experience with PD
- Practicing procedures and following up with constructive feedback
- Frequent check-ins from the supervisor
- Networking with the larger parish community

# Strategy 1: Utilize Your Extroverts

Mentor teachers and co-workers are crucial towards the onboarding process

- Today's employees want to be “valued partners” in their workplace.
  - Therefore, you likely have employees who WANT to help their new coworkers!
- Balance structured meeting time with informal time together
  - Shared playground schedules
  - Overlap planning times



Abrams, 2018

Objective 2: Discuss time management & organizational strategies for orienting & onboarding

# Strategy 2: Make it Multimedia

Be creative with how you integrate new employees into the niche parts of the organization

- Record the Christmas Program and show teachers students from their class
- Ask the new employee to create a social media post introducing themselves and their new classroom
- Create infographics, roadmaps, or manuals to help employees find their own answers to questions

**All About My School!**

By: \_\_\_\_\_ 😊

I like learning about \_\_\_\_\_

My favorite toy at school is \_\_\_\_\_

Outside, I like to play \_\_\_\_\_

My favorite food at school is \_\_\_\_\_

My favorite time of the day is when we  
\_\_\_\_\_

**H T E E C !**

Objective 2: Discuss time management & organizational strategies for orienting & onboarding

# Both Orientation and Onboarding should be....

- **Purposeful:** systematically designed and structured to achieve the organization's goals
- **Personal:** focused on *this* employee and their individual experience and role
- **Collaborative:** the employee and supervisor/mentor work in tandem throughout the entire process
- **Flexible:** everything is open to questions, feedback, and clarification from the employee; topics are re-addressed as needed

# Let's Be Real: Orientation vs. Onboarding

Orientation:

What is the “story” of your organization? What do you do if you’re still figuring that story out?

Is there a way to avoid having employees feel overwhelmed during orientation?

Onboarding:

What barriers keep us from onboarding new employees with care and attention?

What are the potential benefits and downsides of using a “mentor” in the onboarding process?

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