



# New Educator Onboarding Guide

October 2017

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## Executive Summary

CMSD is in an excellent position to attract outstanding employees. We offer a dynamic work environment, excellent benefits, and a compelling mission – not to mention a reputation as one of the leaders in education reform. At CMSD, every employee is an Educator!

However, hiring great people is only the first step in building a committed, successful workforce. An organization's approach to onboarding is critical to an employee's performance, an employee's level of engagement, and an employee's desire to stay with the organization. Onboarding is pivotal for both new Educators and CMSD. You may not know that 90% of employees decide whether to stay with an organization within the first six months. Losing an employee in the first year can cost as much as three times their salary.

*Onboarding helps our new Educators assimilate into work, school and team processes and into an organizational culture. It provides new Educators with the necessary tools and resources to carry out their jobs and clear channels for ongoing knowledge acquisition and collaboration. It instills in them a sense of connection to individual, group, and organization goals and a drive to contribute.*

*Research has found effective onboarding<sup>1</sup>:*

- 1. Helps employees contribute quickly*
- 2. Enhances individual and group productivity*
- 3. Fosters relationship building and networking*
- 4. Fully transitions employees to the role, organization and culture*

The Principal/Manager's role is crucial in the process. While Talent plays a key role in orienting and supporting the Principal/Manager to onboard new Educators, Principals/Managers play the most important role in the onboarding process. The relationship between a new Educator and their Principal/Manager is the determining factor in whether the employee chooses to stay with an organization. It's deeply important that CMSD leaders begin to see onboarding as an essential component of their responsibility. The Talent Department will be providing various tools for managers and principals including a:

- Principal/Manager Onboarding Checklist
- Welcome Email
- Team Announcement

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<sup>1</sup> *"Onboarding New Employees," SHRM Foundation Effective Practice Guidelines Series, Talya N. Bauer, PhD*

## Orientation vs. Onboarding

Orientation is a one-time event welcoming new Educators to CMSD.

Onboarding is a series of events (including orientation) that helps them understand how to be successful in their day to day job and how their work contributes to CMSD overall.

Orientation and onboarding are not interchangeable. You need an orientation to get new Educators immediately familiar with CMSD’s culture. You need an onboarding process to get them invested in their day-to-day roles and to see how their role helps CMSD meet its goals.

## Orientation and Onboarding Matter at CMSD

To set new Educators up for success, they need to attend orientation. Since orientation launched in July of 2016, we have served a little over **180 new hires** through New Educator Orientation. An additional **230 teachers** were oriented through Blue Institute. During that period, we hired close to **600 employees, leaving more than 30%** of our New Educators with no orientation at all.

For the Talent Department to successfully orient our New Educators, we need the support of Principals and Managers. We know that it is imperative that our employees move into their roles as quickly as possible. However, lack of orientation and poor onboarding can mean greater disengagement and higher turnover. This leaves Principals and Managers with a poorly prepared or lower performing employee or simply another open position to fill once that employee calls it quits.

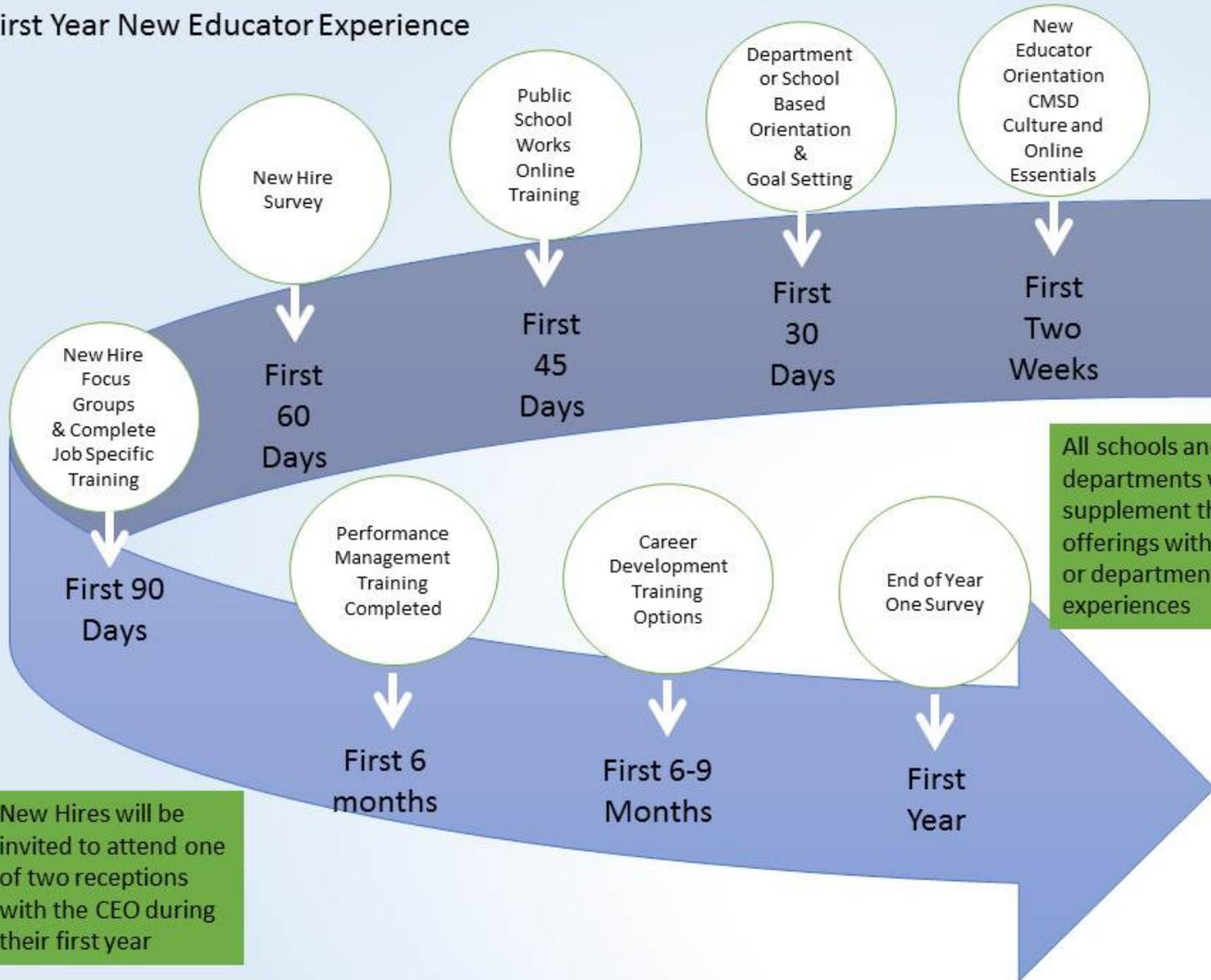
After delivering New Educator Orientation for almost a year, we have filled in the gaps and are proposing a more robust orientation experience that leaves employees better prepared to report to their schools or departments.

### **New Educator Orientation Sample Schedule**

<b>Time</b>	<b>Content</b>
<b>8:00 a.m. to 8:30 a.m.</b>	Sign in, Settle and Enjoy a light Breakfast
<b>8:30 a.m. to 8:45 a.m.</b>	Introduction & Icebreaker
<b>Building CMSD Culture</b>	
<b>8:45 a.m. to 9:45 a.m.</b>	<ul style="list-style-type: none"><li>• History of CMSD</li><li>• Cleveland Plan</li><li>• Portfolio Strategy</li><li>• Theory of Action</li></ul>
<b>Your Role in CMSD Culture</b>	
<b>9:45 a.m. to 9:50 a.m.</b>	Managing Performance at CMSD

9:50 a.m. to 10:00 a.m.	SEL Framework
10:00 a.m. to 10:10 a.m.	BREAK
10:10 a.m. to 11:45 a.m.	HEART Training
11:45 a.m. to 12:30 p.m.	Equity & Inclusion at CMSD
<b>Lunch</b>	
<b>CMSD Nuts &amp; Bolts</b>	
1:00 p.m. to 1:30 p.m.	Working in the Public Sector: Ethics, Conflict of Interest, Public Records etc. Policy and Procedures Manual
1:30 p.m. to 2:15 p.m.	IT: "Do It"
2:15 p.m. to 2:45 p.m.	Workday ESS
2:45 p.m. to 2:55 p.m.	Break
2:55 p.m. to 3:40 p.m.	Workday ESS
3:40 p.m. to 4:15 p.m.	CMSD Benefits
4:15 p.m. to 4:30 p.m.	Closing & Instructions for Following Day
<b>Day II</b>	
<b>CMSD Online Essentials</b>	
8:00 a.m. to 8:30 a.m.	Sign in, Settle and Enjoy a light Breakfast
8:30 a.m. to 10:00 a.m.	Smart Find
10:00 a.m. to 11:00 a.m.	E School +
11:00 a.m. to 11:10 a.m.	Break
11:10 a.m. to 12:10 a.m.	Procurement
12:10 p.m. to 12:45 p.m.	Lunch
12:45 p.m. to 2:45 p.m.	Procurement Continued
2:45 p.m. to 2:50 p.m.	Stretch Break
2:50 p.m. to 4:20 p.m.	MSS Training
4:20 p.m. to 4:30 p.m.	Closing

# First Year New Educator Experience



All schools and departments will supplement these offerings with school or department based experiences

New Hires will be invited to attend one of two receptions with the CEO during their first year

**TOOLS**

## Principal Onboarding Checklist

### How to Use this Checklist

Recognizing that new Educator onboarding is a continuous process, this checklist is designed as a guide for you to use to acquaint the new Educator with your school and the District. This checklist is not meant to limit you in the orientation of your new educator, but rather to act as an outline of the minimum information that should be discussed with the Educator starting on their first day of work and in the weeks following. Completed checklists are to be maintained in your school's files. Additional checklists may be obtained from the Talent Department. Feel free to enlist the assistance of other teachers and team members in this process.

1. This checklist should be completed for (all permanent and long-term sub) new Educators beginning employment with the Cleveland Metropolitan School District.
  2. Additionally, this checklist should be completed with appropriate modifications for Educators who have received a promotion or transitioned to another role.
  3. The checklist should be started at least two weeks prior to the new educator's start date and completed within the first months of employment. True onboarding of an Educator takes six to twelve months, and the last section has checkpoints beyond the first 30 days.
  4. Some items in this checklist may be used when acquainting new temporary Educators or interns as well.
  5. Copies of the completed checklist may be provided to the educator. The original should be retained in your school's files.
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Please check off ✓ each activity after completion.

### Before an Educator's Start Date

**Educator Orientation:** New Educators are expected to attend orientation within their first couple of weeks of work. If attending orientation immediately isn't feasible, principals should make sure that new Educators are registered within their first two weeks of work.

- Sessions are held bi-weekly June-September and monthly the rest of the year.
- Sessions are up to two days (depending on the amount of Workday training required) and will support New Educators in being work ready once they reach their school.
- Registration will occur at the time of the hiring decision and selection of educator's start date.

**Email Notices:** Principals should send an email to their staff and to key stakeholders informing them of the arrival of the new educator.

Principals should also send a welcome email to the new Educator welcoming them to CMSD and their new school. Provide any necessary details about parking, entering the building, appropriate dress and their schedule for the first few days.

**Paperwork:** Required paperwork/documentation will be sent to Educators upon hire; they should complete their paperwork and return it prior to their first day of work. **Please note:** a delay in the submission of or incomplete new Educator paperwork to Talent can delay system access, email, payroll, etc. New Educators who will be in direct contact with children cannot begin work until their background check is complete. I-9 forms must be complete within the first three days of hire.

**Technology:** Instructions for email and Workday set-up will be automatically generated and sent to the new educator's personal email address prior to or within a day or two of their employment. To ensure that the new Educator has the necessary tools to do their job, work with CMSD's Information Technology Department to order any required technology, obtain all school shared drives or network locations, with access granted after the Educator starts their employment, obtain appropriate login information and instructions for systems the Educator will need to use.

**Clean and prepare the workspace/desk/office/cubicle/classroom:** A New Educator should enter an environment that looks prepared for their arrival. Their space should be clear of clutter, old files, garbage, etc. The area, desk drawers, and shelves should be empty and clean. Be sure to provide them with basic supplies.

## The First Thirty Days

**First Week Agenda:** An agenda for the first week showing how will they spend their time should be created to show the new Educator that you are prepared for their arrival and focused on ensuring a smooth and welcoming transition. Use the checklist for the first week below as a guide, but you may also want to include the following:

- Introductions to individuals in the building along with key stakeholders.
- Arrange for the new Educator to spend time with others in the building to help them acclimated to their new school. Introduce them to grade level and/or subject peers.
- Assign the new Educator buddy or work peer, someone in the building to answer questions, provide direction, help them network with others etc.

## Work Procedures and Policies

- Personal Emergency/Time off Situations:** Review when and who to call when absence is necessary due personal emergencies or immediate need for time off. Explain class coverage process and be sure to connect them with their UCC Chair person.
- Emergency Contact:** Determine how and where principal can contact the Educator during non-working hours, if required.
- Identification Cards:** If ID was not obtained, be sure to explain how new Educators can obtain their ID and how they may be used (if special access is needed, provide information to the Educator).
- Keys and Access Codes:** Provide any necessary keys or access codes to the new Educator to ensure access to needed information/supplies. Be sure to provide any keys to office, desk, filing cabinets, etc.

- Computer Use:** Review the acceptable use policy and explain any school expectations related to use of the computer for personal use, internet access, computer games, etc.
- Training Requirements:** Share training and development opportunities with the Educator including, but not limited to, those offered by the Talent Department and Office of Professional Development. Share with Educators that as a requirement, each Educator is required to complete certain role based trainings through an online portal called **Public Schoolworks and all Resident Educators must obtain TDES Training.**
- Sick Leave:** The required paperwork should be completed and submitted via Workday. Explain to the New Educator any additional information that would support a smooth process in your department/school.

### **Suggested Activities: At the End of the First 30 Days**

- Review the relevant performance management process and set goals (if relevant) with your New Educator.
- Conduct a follow up conversation with the Educator to specifically focus on their experiences in the first 30 days:
  - Ensure they received all the necessary information to perform their job duties.
  - Provide them with initial feedback regarding job performance (if appropriate).
  - Meet with Educator and buddy to review first weeks and answer questions.
  - Check with other members of the team to see how the new Educator is faring.
  - Answer questions they may have related to the school, work assignments, etc.
  - Reiterate the various CMSD Resources available to Educators including:
    - Educator Assistance Program: EASE at Work
    - Review any required training yet to be completed

### **Suggested Activities: During the First 6 Months**

- Conduct mid-year review performance review (if relevant.) Follow TDES cycle for teachers.
- Review progress on performance goals and professional development goals.
- Create an opportunity for Educator to attend or be involved in an activity outside of their work area.
- Meet with Educator and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the educator. Keeping the lines of communication open and creating opportunities for your new Educator to connect and build their capacity are essential to engagement and long-term success.

## Central Office Hiring Manager Onboarding Checklist

### How to Use this Checklist

Recognizing that new Educator onboarding is a continuous process, this checklist is designed as a guide for you to use to acquaint the new Educator with your department and the District. This checklist is not meant to limit you in the orientation of your new educator, but rather to act as an outline of the minimum information that should be discussed with the Educator starting on their first day of work and in the weeks following. Completed checklists are to be maintained in your department's files. Additional checklists may be obtained from the Talent Department. Feel free to enlist the assistance of other team members in this process.

1. This checklist should be completed for all permanent new Educators beginning employment with the Cleveland Metropolitan School District.
2. Additionally, this checklist should be completed with appropriate modifications for Educators who have received a promotion or transfer to another department.
3. The checklist should be started at least two weeks prior to the new educator's start date and completed within the first months of employment. True onboarding of an Educator takes six to twelve months, and the last section has checkpoints beyond the first 30 days.
4. Some items in this checklist may be used when acquainting new temporary Educators or interns as well.
5. Copies of the completed checklist may be provided to the educator. The original should be retained in your departmental files.

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Please check off ✓ each activity after completion.

### Before an Educator's Start Date

**Educator Orientation:** New Educators are expected to attend orientation within their first two weeks of employment. Managers should make sure that new Educators are registered within their first two weeks on the job.

- Sessions are held bi-weekly June-September and monthly the rest of the year.
- Sessions are up to two days (depending on the amount of Workday training required) and will support New Educators in being work ready once they reach their school.
- Registration will occur at the time of the hiring decision and selection of educator's start date.

**Email Notices:** Managers should send an email to their team and to related departments or key contacts informing them of the arrival of the New Educator. Consider including some details about the new person, their background, and their role on the team.

Managers should also send a welcome email to the New Educator welcoming them to CMSD and their new department. Provide any necessary details about parking, entering the building, appropriate dress and their schedule for the first day.

**Paperwork:** Required paperwork/documentation will be sent to Educators upon hire; they should complete their paperwork and return it prior to their first day of work. **Please note:** a delay in the submission of or incomplete New Educator paperwork to Talent can delay system access, email, payroll, etc. New Educators who will be in direct contact with children cannot begin work until their background check is complete. I-9 forms must be complete within the first three days of hire.

**Technology:** Instructions for email and Workday set-up will be automatically generated and sent to the new educator's personal email address prior to or within a day or two of their employment. To ensure that the new Educator has the necessary tools to do their job, work with CMSD's Information Technology Department to:

- Order any required technology (computer, cell phone, office phone).
- Obtain all department or team shared drives or network locations, with access granted after the Educator starts their employment
- Establish voicemail, or reset voicemail from previous Educator

**Clean and prepare the workspace/desk/office/cubicle/classroom:** A New Educator should enter an environment that looks prepared for their arrival.

- Office Supplies:** Provide initial supplies (pens, pencils, tape, stapler note pads, post it notes, paperclips, etc.) to the educator.
- Clean and Prepare Workstation:** The workstation (desk/office/cubicle/classroom) of the New Educator should be clear of clutter, old files, garbage, etc. The area, desk drawers, and shelves should be empty and clean.
- Additional Resources:** Gather any resources (e.g., email set up, voicemail instructions, district maps, lunch locations etc.) needed for their job.
- Business Cards:** Order business cards (if applicable) or leave order form on their desk for completion.

## The First Thirty Days

**First Week Agenda:** An agenda for the first week showing how will they spend their time should be created to show the New Educator that you are prepared for their arrival and focused on ensuring a smooth and welcoming transition. Use the checklist for the first week below as a guide, but you may also want to include the following:

- Lunch with their immediate supervisor/manager and/or lunch with other individuals in the building/department or key contacts.
- Arrange for the New Educator to spend time with each member of the department or other key contacts/departments to learn about their roles and responsibilities.
- Assign the New Educator buddy or work peer, someone on the team to answer questions, provide direction, help them network with others etc.
- Times of any scheduled meetings or events the New Educator should attend.
- Provide an organizational chart (if relevant).

- Schedule one on one meetings with your New Educator weekly or bi-weekly, especially in the initial stages of their employment.

## Work Responsibilities and Assignments

- Position Description:** Review the educator's position description and give the Educator copy. Explain how the position description is related to the relevant Performance Evaluation Process.
- Business Hours:** Establish business hours.
- Work Assignments:** Arrange for specific work assignments and assist in initial performance.
- Job Assistance:** Designate a person that the Educator may call for questions, clarification, and future assistance. This person could be the same as or different than the designated buddy.
- Performance Evaluation Process:** Explain the performance evaluation process for the Educator. Discuss timing of the evaluation process and how the process will be handled. This will expand on what the new Educator learned about performance management during New Educator Orientation.

## Work Procedures and Policies

- Personal Emergency/Time off Situations:** Review when and who to call when absence is necessary due personal emergencies or immediate need for time off.
- Emergency Contact:** Determine how and where manager can contact the Educator during non-working hours, if required.
- Pay Checks:** Confirm that New Educators have a copy of the pay schedule or knows where to find it in Workday.
- Identification Cards:** If ID was not obtained, be sure to explain how New Educators can obtain their ID and how they may be used (if special access is needed, provide information to the Educator).
- Keys and Access Codes:** Provide any necessary keys or access codes to the New Educator to ensure access to needed information/supplies. Be sure to provide any keys to office, desk, filing cabinets, etc.
- Parking:** Designate a person to assist the Educator in obtaining parking if applicable. Review location of parking lots most convenient to the building.
- Telephone:** Explain how the telephone should be answered and departmental practices for telephone usage and personal calls.
- Voicemail and Email Signature:** Explain what should information should be included in the New Educators voicemail prompt and provide an example of the CMSD signature line format.
- Computer Use:** Review the acceptable use policy and explain any departmental expectations related to use of the computer for personal use, internet access, computer games, etc.
- Training Opportunities:** Share training and development opportunities with the Educator including, but not limited to, those offered by the Talent Department and Office of Professional Development. Share with Educators that as a requirement, each Educator is required to complete certain role based trainings through an online portal called **Public Schoolworks** and they will receive an email with instructions for completing this training with in the first couple of weeks of employment.

## Work Schedule

- Work Days:** Provide information on work schedule and hours. Explain any exceptions and reasons for them.
- Overtime/Flextime:** If applicable, discuss authorization required for overtime and/or flextime. Discuss process and authorization for flextime scheduling, if applicable.
- Meals and Breaks:** Review length of lunch and breaks and how the time schedule works. Review specific times and locations for lunch and breaks if designated. Provide information on what is available for lunch and breaks (e.g., area restaurants, vending).
- Time Off/Vacation:** Discuss how time off/vacation is requested and include periods of time when voluntary time off may not be requested. New Educators will learn how to submit their time through our Workday System. However, it is up to the manager to set any expectations around blackout dates or advance notice for taking time off.
- Sick Leave:** The required paperwork should be completed and submitted via Workday. Explain to the New Educator any additional information that would support a smooth process in your department/school.
- Inclement Weather:** Discuss inclement weather and whether the Educator is identified as necessary personnel. Explain where Educators can obtain information concerning closure of the building or entire District.

## Suggested Activities: At the End of the First 30 Days

- Review the CMSD Educator Policies and Procedures Manual to address any questions and provide an avenue to future questions.
- Review the relevant performance management process and set goals with your New Educator.
- Conduct a follow up conversation with the Educator to specifically focus on their experiences in the first 30 days:
  1. Ensure they received all the necessary information to perform their job duties.
  2. Provide them with initial feedback regarding job performance.
  3. Meet with Educator and buddy to review first weeks and answer questions.
  4. Check with other members of the team to see how the New Educator is faring.
  5. Answer questions they may have related to the department, work assignments, etc.
  6. Reiterate the various CMSD Resources available to Educators including:
    - Educator Assistance Program: EASE at Work
    - Review any required training yet to be completed

## Suggested Activities: During the Next 60 Days

- Continue to provide timely, on-going, meaningful “everyday feedback.” Advise Educator of upcoming formal review point on applicable performance evaluation system and timing for at the timing designated for the District (calendar or fiscal year cycle.)
- Continue to elicit feedback from the Educator on an ongoing basis.
- Continue introducing Educator to key people and bring them to relevant events.
- Have Educator “shadow” you at meetings to get exposure to others and learn more about the department and organization.
- Have another check-in with the Educator and buddy.
- Take Educator out to lunch, and have informal conversation about how things are going.

## **Suggested Activities: During the First 6 Months**

- Conduct mid-year review performance review.
- Review progress on performance goals and professional development goals.
- Create an opportunity for Educator to attend or be involved in an activity outside of their work area.
- Meet with Educator and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the Educator.
- Keeping the lines of communication open and creating opportunities for your new Educator to connect and build their capacity are essential to engagement and long-term success.

# CMSD Buddy

A buddy is someone who partners with a new employee during their first ninety days of employment. While primarily responsible for offering advice and guidance regarding the day-to-day aspects of working at CMSD, the buddy may also offer encouragement and knowledge resources, as they help introduce the new employee to the CMSD culture.

## Why have a buddy?

The purpose of new employees being assigned a buddy is to help welcome employees and reaffirm their decision to join CMSD. It provides new employees with a reliable, motivated, single point-of-contact for their basic questions regarding their work experience at CMSD. It also helps establish orientation as a process, rather than a single learning event.

## Other advantages of having a buddy include:

- Build on the knowledge obtained in the New Employee Orientation and department orientation
- Enable new employees to become knowledgeable about department practices and organizational culture in a shorter period
- Ensure that routine queries regarding basic operational issues are dealt with expeditiously
- Reduce the initial confusion and uncertainty faced by all new employees
- Maximize the productivity of manager/new employee meetings by allowing them to focus on job-specific issues
- Increase the new employee's self-confidence allowing him/her to focus on adding value to the organization

## Key characteristics of a buddy include:

- **Communicator:** A buddy should encourage open communication. The buddy should provide relevant information to the new employee and encourage a process of continued, self-directed learning.
- **Role Model:** The buddy should be a model employee and exemplify CMSD values.
- **Motivated:** The buddy should have a positive outlook on their work and use that perspective to help build self-confidence and loyalty in the new employee. The buddy should lead by example.
- **Strong Performer:** The buddy can help guide the new employee in many situations based on their experience and knowledge obtained in the work environment.

## What the Buddy Expects From their New Educator:

- The new educator will receive constructive criticism in good spirit
- The new educator will display a "coachable" attitude
- The new educator will display an eagerness to learn

## **What a Buddy Is Not**

A buddy shall not be required to assume any of the following roles:

- Mentor: Someone, typically more experienced, who is involved with the all-round development of an individual (personal and professional).
- Manager: Someone responsible for the new employee's job performance. If queries arise regarding performance, disciplinary or policy matters, the buddy is free to give their opinion and advice on how to approach the situation. However, they are not able to resolve the matter. The new employee must be directed to their manager for resolution of the relevant issue(s).

## **Buddy Responsibilities**

- Contact and meet with the new employee on Day 1
- Establish a rapport with the new employee
- Have lunch or coffee with the new employee at least once a month
- Act as an informational resource on policies and procedures
- Help socialize the new employee to CMSD's guidelines, norms and culture
- Answer general/routine questions
- Make introductions
- Ensure an open communication between the new employee and the buddy, respecting confidentiality
- Follow up with the new employee on a weekly basis

## **Formal Relationship – 90 Days**

- Day One- meet new employee. Grab coffee or lunch with them sometime during their first week
- Check- in with them weekly for 5-15 minutes in duration
- Call/email questions, as needed. Buddy to set acceptable perimeters.

## **Informal Relationship – Open**

- The buddy can provide continued support beyond the 90 Day expiration of the formal relationship if such support is warranted and welcomed by the new employee.

## **Tips for Buddies:**

- Don't worry about being perceived as the expert. Focus your attention on the new employee
- Be patient: It takes time to develop a relationship. Don't try to cover everything right away
- Be positive: New employees will grow into their roles if given proper reinforcement
- Don't try to force a relationship
- Try to identify the new employee's personality and communication style and adapt accordingly
- Don't be judgmental. Simply offer feedback
- Maintain a good attitude and a teaching spirit

## **SAMPLE NEW EDUCATOR WELCOME LETTER FROM SUPERVISOR**

**[Should be on Principal/Manager Letterhead and Sent Electronically]**

Hi [Insert Name]!

Welcome to Cleveland Metropolitan School District! We look forward to you joining our team.

You should plan to arrive at 8:00 am on \_\_\_\_\_. Upon entering the building go to the school/office or Welcome Center, and they will advise me of your arrival.

During your first day, we will discuss your schedule and discuss the [school's/department's] and the District's expectations for your role. If you have not attended New Educator Orientation, we will discuss how you can register for the course.

During your first few weeks, you will meet many co-workers, school-based administrators and Talent staff. We are all here to support you! These individuals are available to serve as a resource, so please let them know what you need to accomplish your new responsibilities. We are excited about you joining us and want to ensure that you are successful in your new role.

We look forward to a positive working relationship!

If you have any questions, please don't hesitate to contact me at [insert phone number] or email [insert email address].

## **SAMPLE WELCOME EMAIL TO THE DEPARTMENT/SCHOOL ABOUT NEW EDUCATOR**

Hello Team!

I am pleased to announce that [First and Last Name] has accepted the position of [Title] in [Department/School], effective [Hire Date]. This position reports to [Name].

[First Name] will be responsible for [High Level Overview of Major Responsibilities].

Prior to accepting this position, he/she was [list previous experience or educational background].

I am confident that [First Name] will be an excellent match for this position and a strong asset to the [Department/School]. [First Name] will be located in [Building/Room #] and can be reached at [Extension] or [E-Mail Address].

Please join me in welcoming her/him to [the Department/School]!



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- 1. Helps employees contribute quickly*
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- 3. Fosters relationship building and networking*
- 4. Fully transitions employees to the role, organization and culture*

The Principal/Manager's role is crucial in the process. While Talent plays a key role in orienting and supporting the Principal/Manager to onboard new Educators, Principals/Managers play the most important role in the onboarding process. The relationship between a new Educator and their Principal/Manager is the determining factor in whether the employee chooses to stay with an organization. It's deeply important that CMSD leaders begin to see onboarding as an essential component of their responsibility. The Talent Department will be providing various tools for managers and principals including a:

- Principal/Manager Onboarding Checklist
- Welcome Email
- Team Announcement

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<sup>1</sup> *"Onboarding New Employees," SHRM Foundation Effective Practice Guidelines Series, Talya N. Bauer, PhD*

## Orientation vs. Onboarding

Orientation is a one-time event welcoming new Educators to CMSD.

Onboarding is a series of events (including orientation) that helps them understand how to be successful in their day to day job and how their work contributes to CMSD overall.

Orientation and onboarding are not interchangeable. You need an orientation to get new Educators immediately familiar with CMSD’s culture. You need an onboarding process to get them invested in their day-to-day roles and to see how their role helps CMSD meet its goals.

## Orientation and Onboarding Matter at CMSD

To set new Educators up for success, they need to attend orientation. Since orientation launched in July of 2016, we have served a little over **180 new hires** through New Educator Orientation. An additional **230 teachers** were oriented through Blue Institute. During that period, we hired close to **600 employees, leaving more than 30%** of our New Educators with no orientation at all.

For the Talent Department to successfully orient our New Educators, we need the support of Principals and Managers. We know that it is imperative that our employees move into their roles as quickly as possible. However, lack of orientation and poor onboarding can mean greater disengagement and higher turnover. This leaves Principals and Managers with a poorly prepared or lower performing employee or simply another open position to fill once that employee calls it quits.

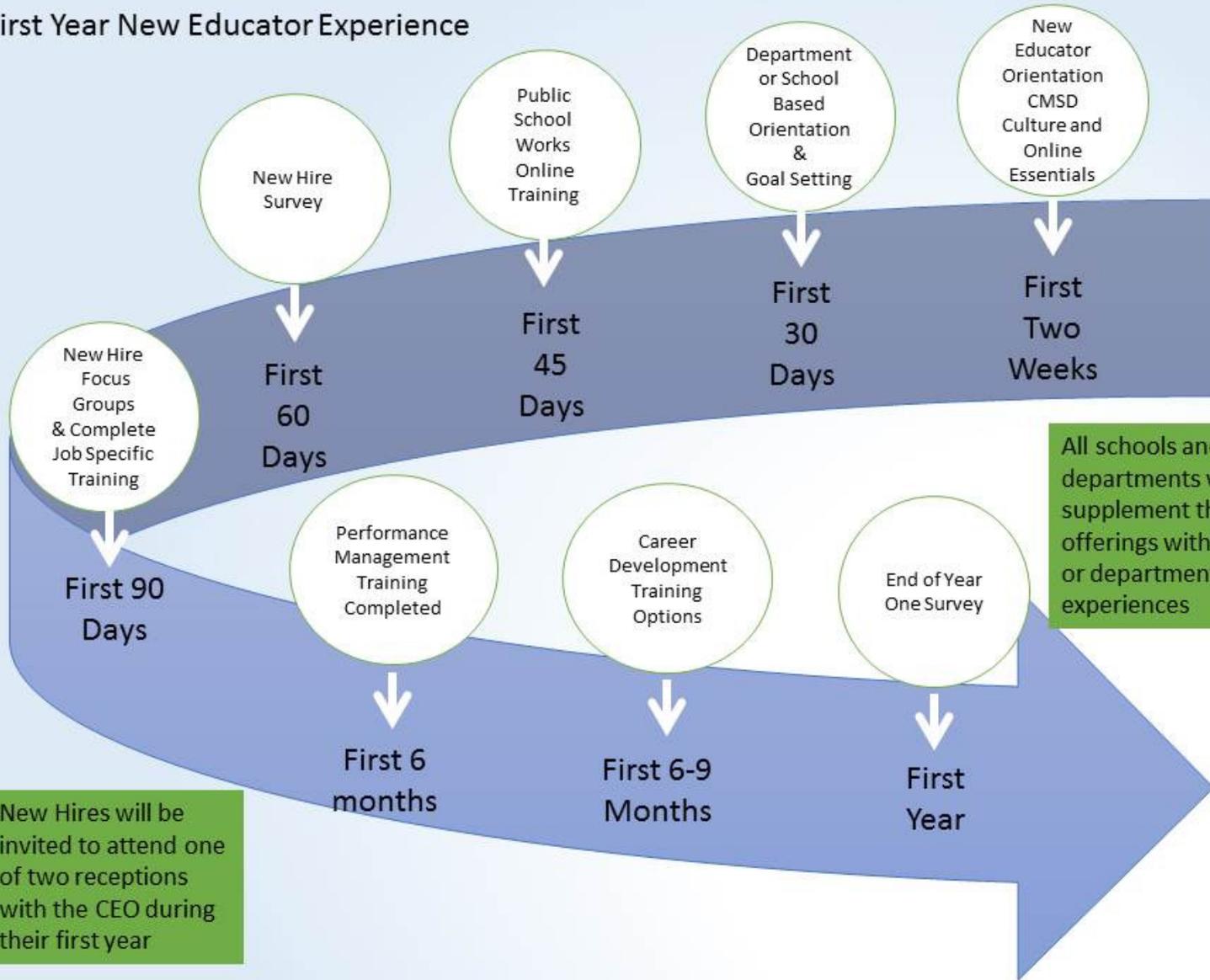
After delivering New Educator Orientation for almost a year, we have filled in the gaps and are proposing a more robust orientation experience that leaves employees better prepared to report to their schools or departments.

### **New Educator Orientation Sample Schedule**

<b>Time</b>	<b>Content</b>
<b>8:00 a.m. to 8:30 a.m.</b>	Sign in, Settle and Enjoy a light Breakfast
<b>8:30 a.m. to 8:45 a.m.</b>	Introduction & Icebreaker
<b>Building CMSD Culture</b>	
<b>8:45 a.m. to 9:45 a.m.</b>	<ul style="list-style-type: none"><li>• History of CMSD</li><li>• Cleveland Plan</li><li>• Portfolio Strategy</li><li>• Theory of Action</li></ul>
<b>Your Role in CMSD Culture</b>	
<b>9:45 a.m. to 9:50 a.m.</b>	Managing Performance at CMSD

<b>9:50 a.m. to 10:00 a.m.</b>	SEL Framework
<b>10:00 a.m. to 10:10 a.m.</b>	BREAK
<b>10:10 a.m. to 11:45 a.m.</b>	HEART Training
<b>11:45 a.m. to 12:30 p.m.</b>	Equity & Inclusion at CMSD
<b>Lunch</b>	
<b>CMSD Nuts &amp; Bolts</b>	
<b>1:00 p.m. to 1:30 p.m.</b>	Working in the Public Sector: Ethics, Conflict of Interest, Public Records etc. Policy and Procedures Manual
<b>1:30 p.m. to 2:15 p.m.</b>	IT: "Do It"
<b>2:15 p.m. to 2:45 p.m.</b>	Workday ESS
<b>2:45 p.m. to 2:55 p.m.</b>	Break
<b>2:55 p.m. to 3:40 p.m.</b>	Workday ESS
<b>3:40 p.m. to 4:15 p.m.</b>	CMSD Benefits
<b>4:15 p.m. to 4:30 p.m.</b>	Closing & Instructions for Following Day
<b>Day II</b>	
<b>CMSD Online Essentials</b>	
<b>8:00 a.m. to 8:30 a.m.</b>	Sign in, Settle and Enjoy a light Breakfast
<b>8:30 a.m. to 10:00 a.m.</b>	Smart Find
<b>10:00 a.m. to 11:00 a.m.</b>	E School +
<b>11:00 a.m. to 11:10 a.m.</b>	Break
<b>11:10 a.m. to 12:10 a.m.</b>	Procurement
<b>12:10 p.m. to 12:45 p.m.</b>	Lunch
<b>12:45 p.m. to 2:45 p.m.</b>	Procurement Continued
<b>2:45 p.m. to 2:50 p.m.</b>	Stretch Break
<b>2:50 p.m. to 4:20 p.m.</b>	MSS Training
<b>4:20 p.m. to 4:30 p.m.</b>	Closing

# First Year New Educator Experience



**TOOLS**

## Principal Onboarding Checklist

### How to Use this Checklist

Recognizing that new Educator onboarding is a continuous process, this checklist is designed as a guide for you to use to acquaint the new Educator with your school and the District. This checklist is not meant to limit you in the orientation of your new educator, but rather to act as an outline of the minimum information that should be discussed with the Educator starting on their first day of work and in the weeks following. Completed checklists are to be maintained in your school's files. Additional checklists may be obtained from the Talent Department. Feel free to enlist the assistance of other teachers and team members in this process.

1. This checklist should be completed for (all permanent and long-term sub) new Educators beginning employment with the Cleveland Metropolitan School District.
  2. Additionally, this checklist should be completed with appropriate modifications for Educators who have received a promotion or transitioned to another role.
  3. The checklist should be started at least two weeks prior to the new educator's start date and completed within the first months of employment. True onboarding of an Educator takes six to twelve months, and the last section has checkpoints beyond the first 30 days.
  4. Some items in this checklist may be used when acquainting new temporary Educators or interns as well.
  5. Copies of the completed checklist may be provided to the educator. The original should be retained in your school's files.
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Please check off ✓ each activity after completion.

### Before an Educator's Start Date

**Educator Orientation:** New Educators are expected to attend orientation within their first couple of weeks of work. If attending orientation immediately isn't feasible, principals should make sure that new Educators are registered within their first two weeks of work.

- Sessions are held bi-weekly June-September and monthly the rest of the year.
- Sessions are up to two days (depending on the amount of Workday training required) and will support New Educators in being work ready once they reach their school.
- Registration will occur at the time of the hiring decision and selection of educator's start date.

**Email Notices:** Principals should send an email to their staff and to key stakeholders informing them of the arrival of the new educator.

Principals should also send a welcome email to the new Educator welcoming them to CMSD and their new school. Provide any necessary details about parking, entering the building, appropriate dress and their schedule for the first few days.

**Paperwork:** Required paperwork/documentation will be sent to Educators upon hire; they should complete their paperwork and return it prior to their first day of work. **Please note:** a delay in the submission of or incomplete new Educator paperwork to Talent can delay system access, email, payroll, etc. New Educators who will be in direct contact with children cannot begin work until their background check is complete. I-9 forms must be complete within the first three days of hire.

**Technology:** Instructions for email and Workday set-up will be automatically generated and sent to the new educator's personal email address prior to or within a day or two of their employment. To ensure that the new Educator has the necessary tools to do their job, work with CMSD's Information Technology Department to order any required technology, obtain all school shared drives or network locations, with access granted after the Educator starts their employment, obtain appropriate login information and instructions for systems the Educator will need to use.

**Clean and prepare the workspace/desk/office/cubicle/classroom:** A New Educator should enter an environment that looks prepared for their arrival. Their space should be clear of clutter, old files, garbage, etc. The area, desk drawers, and shelves should be empty and clean. Be sure to provide them with basic supplies.

## The First Thirty Days

**First Week Agenda:** An agenda for the first week showing how will they spend their time should be created to show the new Educator that you are prepared for their arrival and focused on ensuring a smooth and welcoming transition. Use the checklist for the first week below as a guide, but you may also want to include the following:

- Introductions to individuals in the building along with key stakeholders.
- Arrange for the new Educator to spend time with others in the building to help them acclimated to their new school. Introduce them to grade level and/or subject peers.
- Assign the new Educator buddy or work peer, someone in the building to answer questions, provide direction, help them network with others etc.

## Work Procedures and Policies

- Personal Emergency/Time off Situations:** Review when and who to call when absence is necessary due personal emergencies or immediate need for time off. Explain class coverage process and be sure to connect them with their UCC Chair person.
- Emergency Contact:** Determine how and where principal can contact the Educator during non-working hours, if required.
- Identification Cards:** If ID was not obtained, be sure to explain how new Educators can obtain their ID and how they may be used (if special access is needed, provide information to the Educator).
- Keys and Access Codes:** Provide any necessary keys or access codes to the new Educator to ensure access to needed information/supplies. Be sure to provide any keys to office, desk, filing cabinets, etc.

- Computer Use:** Review the acceptable use policy and explain any school expectations related to use of the computer for personal use, internet access, computer games, etc.
- Training Requirements:** Share training and development opportunities with the Educator including, but not limited to, those offered by the Talent Department and Office of Professional Development. Share with Educators that as a requirement, each Educator is required to complete certain role based trainings through an online portal called **Public Schoolworks and all Resident Educators must obtain TDES Training.**
- Sick Leave:** The required paperwork should be completed and submitted via Workday. Explain to the New Educator any additional information that would support a smooth process in your department/school.

### **Suggested Activities: At the End of the First 30 Days**

- Review the relevant performance management process and set goals (if relevant) with your New Educator.
- Conduct a follow up conversation with the Educator to specifically focus on their experiences in the first 30 days:
  - Ensure they received all the necessary information to perform their job duties.
  - Provide them with initial feedback regarding job performance (if appropriate).
  - Meet with Educator and buddy to review first weeks and answer questions.
  - Check with other members of the team to see how the new Educator is faring.
  - Answer questions they may have related to the school, work assignments, etc.
  - Reiterate the various CMSD Resources available to Educators including:
    - Educator Assistance Program: EASE at Work
    - Review any required training yet to be completed

### **Suggested Activities: During the First 6 Months**

- Conduct mid-year review performance review (if relevant.) Follow TDES cycle for teachers.
- Review progress on performance goals and professional development goals.
- Create an opportunity for Educator to attend or be involved in an activity outside of their work area.
- Meet with Educator and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the educator. Keeping the lines of communication open and creating opportunities for your new Educator to connect and build their capacity are essential to engagement and long-term success.

## Central Office Hiring Manager Onboarding Checklist

### How to Use this Checklist

Recognizing that new Educator onboarding is a continuous process, this checklist is designed as a guide for you to use to acquaint the new Educator with your department and the District. This checklist is not meant to limit you in the orientation of your new educator, but rather to act as an outline of the minimum information that should be discussed with the Educator starting on their first day of work and in the weeks following. Completed checklists are to be maintained in your department's files. Additional checklists may be obtained from the Talent Department. Feel free to enlist the assistance of other team members in this process.

1. This checklist should be completed for all permanent new Educators beginning employment with the Cleveland Metropolitan School District.
2. Additionally, this checklist should be completed with appropriate modifications for Educators who have received a promotion or transfer to another department.
3. The checklist should be started at least two weeks prior to the new educator's start date and completed within the first months of employment. True onboarding of an Educator takes six to twelve months, and the last section has checkpoints beyond the first 30 days.
4. Some items in this checklist may be used when acquainting new temporary Educators or interns as well.
5. Copies of the completed checklist may be provided to the educator. The original should be retained in your departmental files.

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Please check off ✓ each activity after completion.

### Before an Educator's Start Date

**Educator Orientation:** New Educators are expected to attend orientation within their first two weeks of employment. Managers should make sure that new Educators are registered within their first two weeks on the job.

- Sessions are held bi-weekly June-September and monthly the rest of the year.
- Sessions are up to two days (depending on the amount of Workday training required) and will support New Educators in being work ready once they reach their school.
- Registration will occur at the time of the hiring decision and selection of educator's start date.

**Email Notices:** Managers should send an email to their team and to related departments or key contacts informing them of the arrival of the New Educator. Consider including some details about the new person, their background, and their role on the team.

Managers should also send a welcome email to the New Educator welcoming them to CMSD and their new department. Provide any necessary details about parking, entering the building, appropriate dress and their schedule for the first day.

**Paperwork:** Required paperwork/documentation will be sent to Educators upon hire; they should complete their paperwork and return it prior to their first day of work. **Please note:** a delay in the submission of or incomplete New Educator paperwork to Talent can delay system access, email, payroll, etc. New Educators who will be in direct contact with children cannot begin work until their background check is complete. I-9 forms must be complete within the first three days of hire.

**Technology:** Instructions for email and Workday set-up will be automatically generated and sent to the new educator's personal email address prior to or within a day or two of their employment. To ensure that the new Educator has the necessary tools to do their job, work with CMSD's Information Technology Department to:

- Order any required technology (computer, cell phone, office phone).
- Obtain all department or team shared drives or network locations, with access granted after the Educator starts their employment
- Establish voicemail, or reset voicemail from previous Educator

**Clean and prepare the workspace/desk/office/cubicle/classroom:** A New Educator should enter an environment that looks prepared for their arrival.

- Office Supplies:** Provide initial supplies (pens, pencils, tape, stapler note pads, post it notes, paperclips, etc.) to the educator.
- Clean and Prepare Workstation:** The workstation (desk/office/cubicle/classroom) of the New Educator should be clear of clutter, old files, garbage, etc. The area, desk drawers, and shelves should be empty and clean.
- Additional Resources:** Gather any resources (e.g., email set up, voicemail instructions, district maps, lunch locations etc.) needed for their job.
- Business Cards:** Order business cards (if applicable) or leave order form on their desk for completion.

## The First Thirty Days

**First Week Agenda:** An agenda for the first week showing how will they spend their time should be created to show the New Educator that you are prepared for their arrival and focused on ensuring a smooth and welcoming transition. Use the checklist for the first week below as a guide, but you may also want to include the following:

- Lunch with their immediate supervisor/manager and/or lunch with other individuals in the building/department or key contacts.
- Arrange for the New Educator to spend time with each member of the department or other key contacts/departments to learn about their roles and responsibilities.
- Assign the New Educator buddy or work peer, someone on the team to answer questions, provide direction, help them network with others etc.
- Times of any scheduled meetings or events the New Educator should attend.
- Provide an organizational chart (if relevant).

- Schedule one on one meetings with your New Educator weekly or bi-weekly, especially in the initial stages of their employment.

## Work Responsibilities and Assignments

- Position Description:** Review the educator's position description and give the Educator copy. Explain how the position description is related to the relevant Performance Evaluation Process.
- Business Hours:** Establish business hours.
- Work Assignments:** Arrange for specific work assignments and assist in initial performance.
- Job Assistance:** Designate a person that the Educator may call for questions, clarification, and future assistance. This person could be the same as or different than the designated buddy.
- Performance Evaluation Process:** Explain the performance evaluation process for the Educator. Discuss timing of the evaluation process and how the process will be handled. This will expand on what the new Educator learned about performance management during New Educator Orientation.

## Work Procedures and Policies

- Personal Emergency/Time off Situations:** Review when and who to call when absence is necessary due personal emergencies or immediate need for time off.
- Emergency Contact:** Determine how and where manager can contact the Educator during non-working hours, if required.
- Pay Checks:** Confirm that New Educators have a copy of the pay schedule or knows where to find it in Workday.
- Identification Cards:** If ID was not obtained, be sure to explain how New Educators can obtain their ID and how they may be used (if special access is needed, provide information to the Educator).
- Keys and Access Codes:** Provide any necessary keys or access codes to the New Educator to ensure access to needed information/supplies. Be sure to provide any keys to office, desk, filing cabinets, etc.
- Parking:** Designate a person to assist the Educator in obtaining parking if applicable. Review location of parking lots most convenient to the building.
- Telephone:** Explain how the telephone should be answered and departmental practices for telephone usage and personal calls.
- Voicemail and Email Signature:** Explain what should information should be included in the New Educators voicemail prompt and provide an example of the CMSD signature line format.
- Computer Use:** Review the acceptable use policy and explain any departmental expectations related to use of the computer for personal use, internet access, computer games, etc.
- Training Opportunities:** Share training and development opportunities with the Educator including, but not limited to, those offered by the Talent Department and Office of Professional Development. Share with Educators that as a requirement, each Educator is required to complete certain role based trainings through an online portal called **Public Schoolworks** and they will receive an email with instructions for completing this training with in the first couple of weeks of employment.

## Work Schedule

- Work Days:** Provide information on work schedule and hours. Explain any exceptions and reasons for them.
- Overtime/Flextime:** If applicable, discuss authorization required for overtime and/or flextime. Discuss process and authorization for flextime scheduling, if applicable.
- Meals and Breaks:** Review length of lunch and breaks and how the time schedule works. Review specific times and locations for lunch and breaks if designated. Provide information on what is available for lunch and breaks (e.g., area restaurants, vending).
- Time Off/Vacation:** Discuss how time off/vacation is requested and include periods of time when voluntary time off may not be requested. New Educators will learn how to submit their time through our Workday System. However, it is up to the manager to set any expectations around blackout dates or advance notice for taking time off.
- Sick Leave:** The required paperwork should be completed and submitted via Workday. Explain to the New Educator any additional information that would support a smooth process in your department/school.
- Inclement Weather:** Discuss inclement weather and whether the Educator is identified as necessary personnel. Explain where Educators can obtain information concerning closure of the building or entire District.

## Suggested Activities: At the End of the First 30 Days

- Review the CMSD Educator Policies and Procedures Manual to address any questions and provide an avenue to future questions.
- Review the relevant performance management process and set goals with your New Educator.
- Conduct a follow up conversation with the Educator to specifically focus on their experiences in the first 30 days:
  1. Ensure they received all the necessary information to perform their job duties.
  2. Provide them with initial feedback regarding job performance.
  3. Meet with Educator and buddy to review first weeks and answer questions.
  4. Check with other members of the team to see how the New Educator is faring.
  5. Answer questions they may have related to the department, work assignments, etc.
  6. Reiterate the various CMSD Resources available to Educators including:
    - Educator Assistance Program: EASE at Work
    - Review any required training yet to be completed

## Suggested Activities: During the Next 60 Days

- Continue to provide timely, on-going, meaningful “everyday feedback.” Advise Educator of upcoming formal review point on applicable performance evaluation system and timing for at the timing designated for the District (calendar or fiscal year cycle.)
- Continue to elicit feedback from the Educator on an ongoing basis.
- Continue introducing Educator to key people and bring them to relevant events.
- Have Educator “shadow” you at meetings to get exposure to others and learn more about the department and organization.
- Have another check-in with the Educator and buddy.
- Take Educator out to lunch, and have informal conversation about how things are going.

## **Suggested Activities: During the First 6 Months**

- Conduct mid-year review performance review.
- Review progress on performance goals and professional development goals.
- Create an opportunity for Educator to attend or be involved in an activity outside of their work area.
- Meet with Educator and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the Educator.
- Keeping the lines of communication open and creating opportunities for your new Educator to connect and build their capacity are essential to engagement and long-term success.

# CMSD Buddy

A buddy is someone who partners with a new employee during their first ninety days of employment. While primarily responsible for offering advice and guidance regarding the day-to-day aspects of working at CMSD, the buddy may also offer encouragement and knowledge resources, as they help introduce the new employee to the CMSD culture.

## Why have a buddy?

The purpose of new employees being assigned a buddy is to help welcome employees and reaffirm their decision to join CMSD. It provides new employees with a reliable, motivated, single point-of-contact for their basic questions regarding their work experience at CMSD. It also helps establish orientation as a process, rather than a single learning event.

## Other advantages of having a buddy include:

- Build on the knowledge obtained in the New Employee Orientation and department orientation
- Enable new employees to become knowledgeable about department practices and organizational culture in a shorter period
- Ensure that routine queries regarding basic operational issues are dealt with expeditiously
- Reduce the initial confusion and uncertainty faced by all new employees
- Maximize the productivity of manager/new employee meetings by allowing them to focus on job-specific issues
- Increase the new employee's self-confidence allowing him/her to focus on adding value to the organization

## Key characteristics of a buddy include:

- **Communicator:** A buddy should encourage open communication. The buddy should provide relevant information to the new employee and encourage a process of continued, self-directed learning.
- **Role Model:** The buddy should be a model employee and exemplify CMSD values.
- **Motivated:** The buddy should have a positive outlook on their work and use that perspective to help build self-confidence and loyalty in the new employee. The buddy should lead by example.
- **Strong Performer:** The buddy can help guide the new employee in many situations based on their experience and knowledge obtained in the work environment.

## What the Buddy Expects From their New Educator:

- The new educator will receive constructive criticism in good spirit
- The new educator will display a "coachable" attitude
- The new educator will display an eagerness to learn

## **What a Buddy Is Not**

A buddy shall not be required to assume any of the following roles:

- Mentor: Someone, typically more experienced, who is involved with the all-round development of an individual (personal and professional).
- Manager: Someone responsible for the new employee's job performance. If queries arise regarding performance, disciplinary or policy matters, the buddy is free to give their opinion and advice on how to approach the situation. However, they are not able to resolve the matter. The new employee must be directed to their manager for resolution of the relevant issue(s).

## **Buddy Responsibilities**

- Contact and meet with the new employee on Day 1
- Establish a rapport with the new employee
- Have lunch or coffee with the new employee at least once a month
- Act as an informational resource on policies and procedures
- Help socialize the new employee to CMSD's guidelines, norms and culture
- Answer general/routine questions
- Make introductions
- Ensure an open communication between the new employee and the buddy, respecting confidentiality
- Follow up with the new employee on a weekly basis

## **Formal Relationship – 90 Days**

- Day One- meet new employee. Grab coffee or lunch with them sometime during their first week
- Check- in with them weekly for 5-15 minutes in duration
- Call/email questions, as needed. Buddy to set acceptable perimeters.

## **Informal Relationship – Open**

- The buddy can provide continued support beyond the 90 Day expiration of the formal relationship if such support is warranted and welcomed by the new employee.

## **Tips for Buddies:**

- Don't worry about being perceived as the expert. Focus your attention on the new employee
- Be patient: It takes time to develop a relationship. Don't try to cover everything right away
- Be positive: New employees will grow into their roles if given proper reinforcement
- Don't try to force a relationship
- Try to identify the new employee's personality and communication style and adapt accordingly
- Don't be judgmental. Simply offer feedback
- Maintain a good attitude and a teaching spirit

## **SAMPLE NEW EDUCATOR WELCOME LETTER FROM SUPERVISOR**

**[Should be on Principal/Manager Letterhead and Sent Electronically]**

Hi [Insert Name]!

Welcome to Cleveland Metropolitan School District! We look forward to you joining our team.

You should plan to arrive at 8:00 am on \_\_\_\_\_. Upon entering the building go to the school/office or Welcome Center, and they will advise me of your arrival.

During your first day, we will discuss your schedule and discuss the [school's/department's] and the District's expectations for your role. If you have not attended New Educator Orientation, we will discuss how you can register for the course.

During your first few weeks, you will meet many co-workers, school-based administrators and Talent staff. We are all here to support you! These individuals are available to serve as a resource, so please let them know what you need to accomplish your new responsibilities. We are excited about you joining us and want to ensure that you are successful in your new role.

We look forward to a positive working relationship!

If you have any questions, please don't hesitate to contact me at [insert phone number] or email [insert email address].

## **SAMPLE WELCOME EMAIL TO THE DEPARTMENT/SCHOOL ABOUT NEW EDUCATOR**

Hello Team!

I am pleased to announce that [First and Last Name] has accepted the position of [Title] in [Department/School], effective [Hire Date]. This position reports to [Name].

[First Name] will be responsible for [High Level Overview of Major Responsibilities].

Prior to accepting this position, he/she was [list previous experience or educational background].

I am confident that [First Name] will be an excellent match for this position and a strong asset to the [Department/School]. [First Name] will be located in [Building/Room #] and can be reached at [Extension] or [E-Mail Address].

Please join me in welcoming her/him to [the Department/School]!