



Engage | Learn | Improve



**Strategic Onboarding –
More Important Now than Ever!**

Keith Brightman – Director of Finance & Operations

20 years in school finance and operations, 6th year at SDMF

Small District Experience – East Troy School District

- No internal HR staff
- Onboarding the responsibility of DO staff and school staff

Elmbrook and Menomonee Falls School Districts

- HR divisions, well staffed, onboarding duties assigned

**Thank you and credit to MRA for some content and data charts.*

James.Morgan@mranet.org

Simple Check-In

What is going well?

Pain points?

Shout outs?

What can I do to help you?



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Setting the Stage...

'Human Capital'

Unemployment <3%

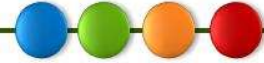
Effectively full employment

Current EE market is not temporary

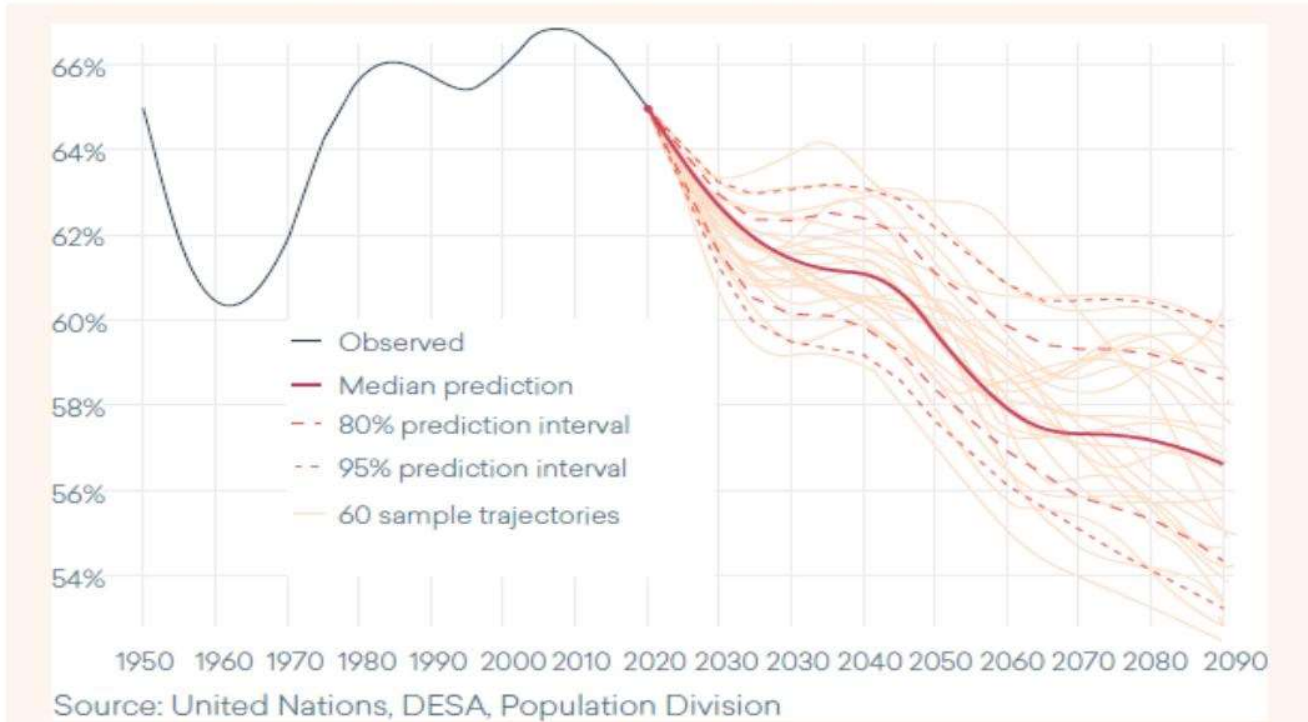


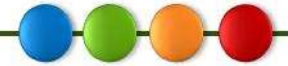
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U.S.: % of population ages 15 – 64

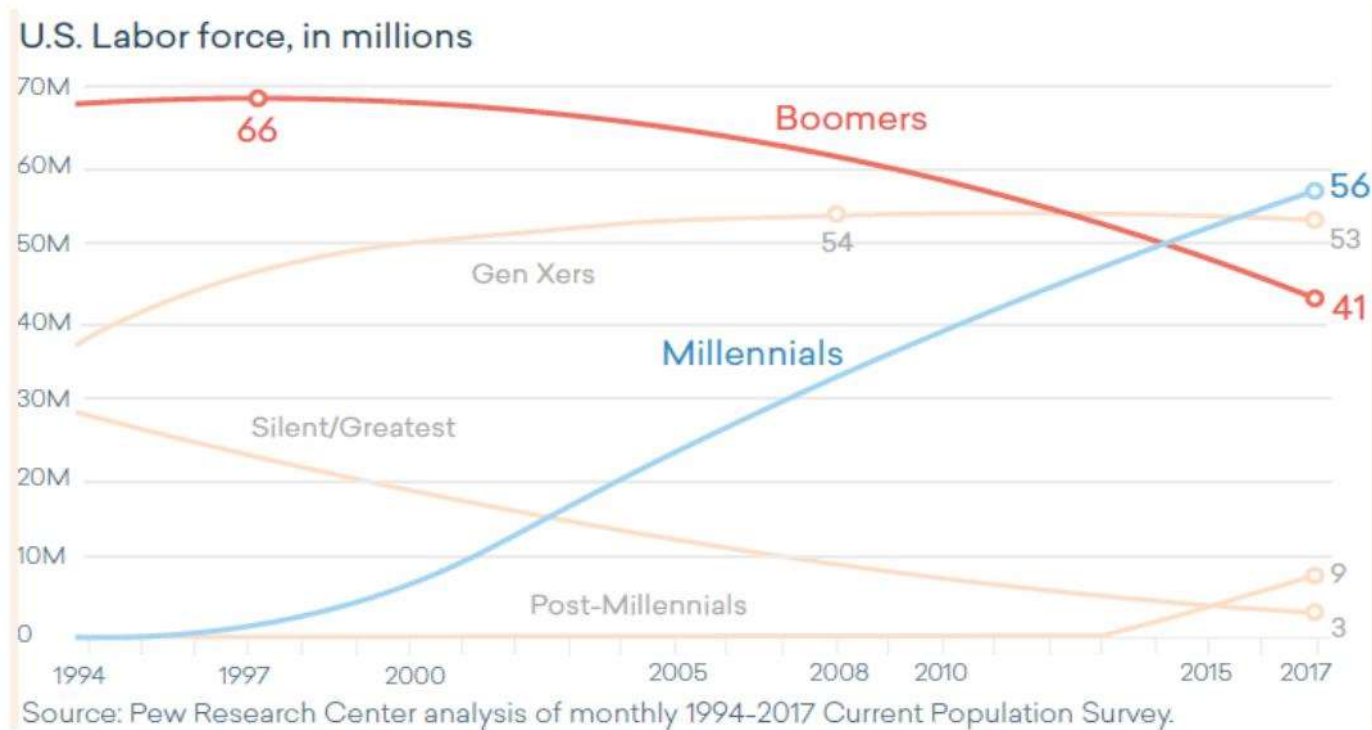


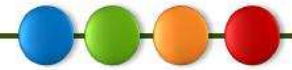


Generations in the Labor Force

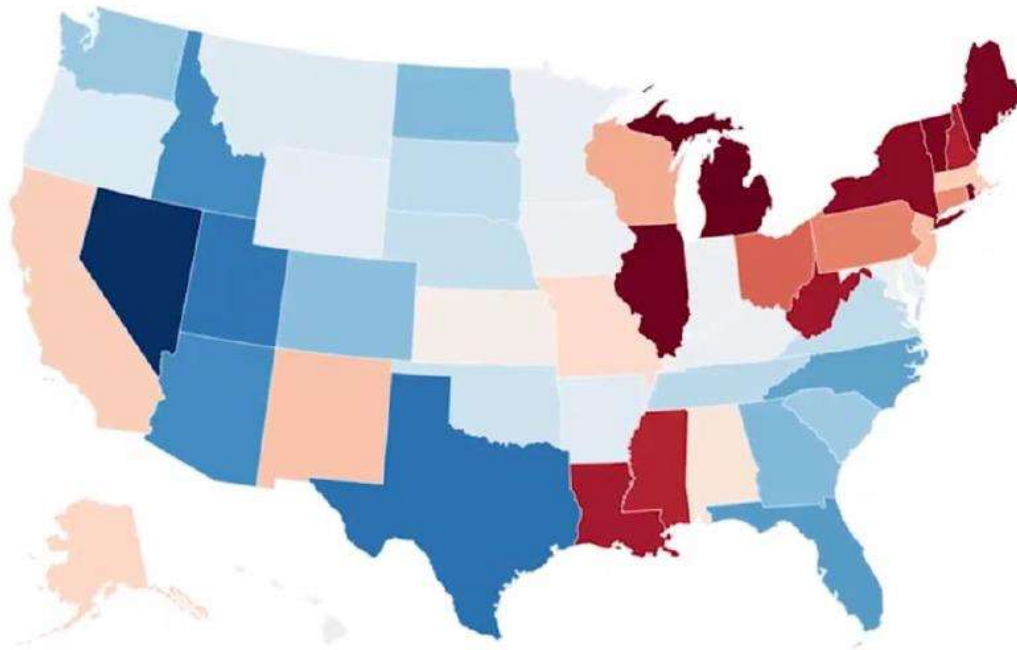
Boomer Retirements:

- 2017 2.2M
- 2018 2.2M
- 2019 1.5M
- 2020 3.2M





2001-2021 – Decline of Young People (<25)



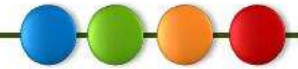
Source: Emsi labor market analytics. 2021

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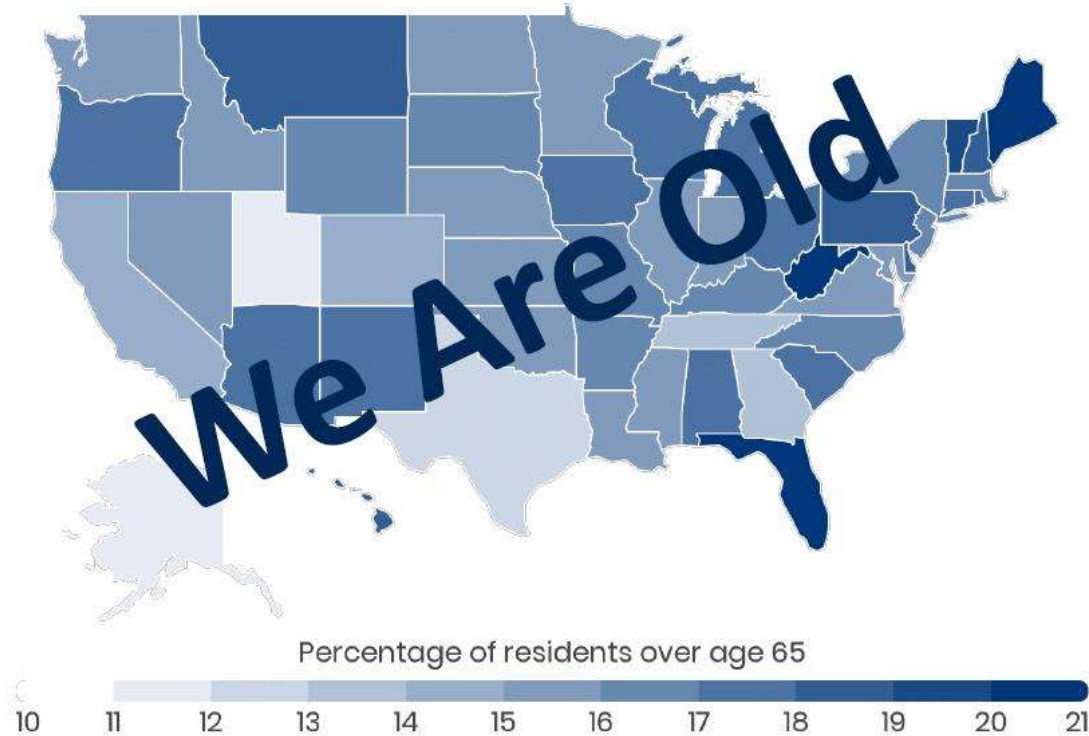


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Percent of Residents Over 65 (2020)



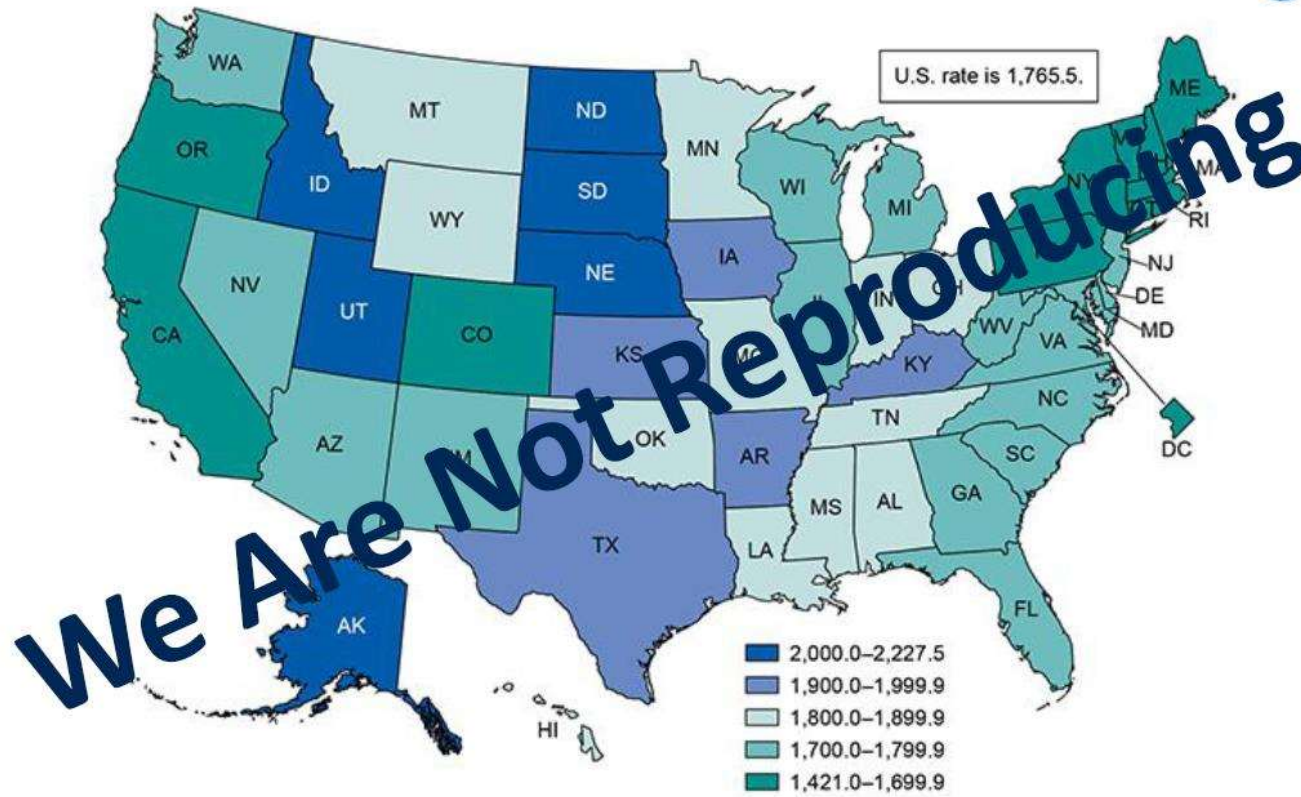
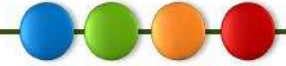
Source: United States Census Bureau

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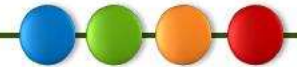
49 of the last 50 years BELOW replacement level

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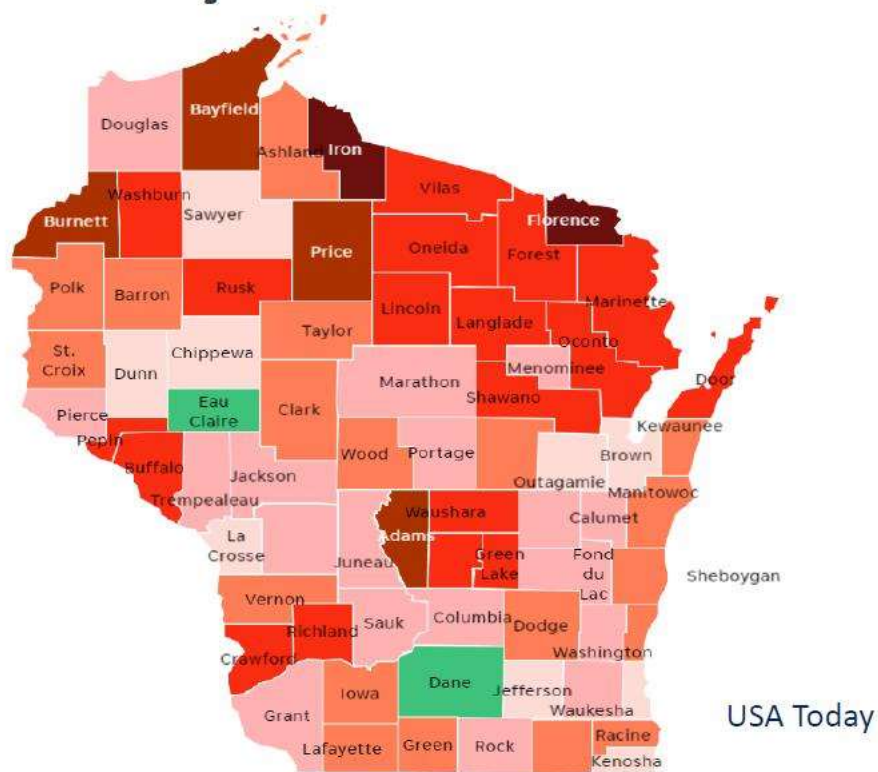


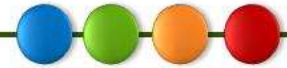
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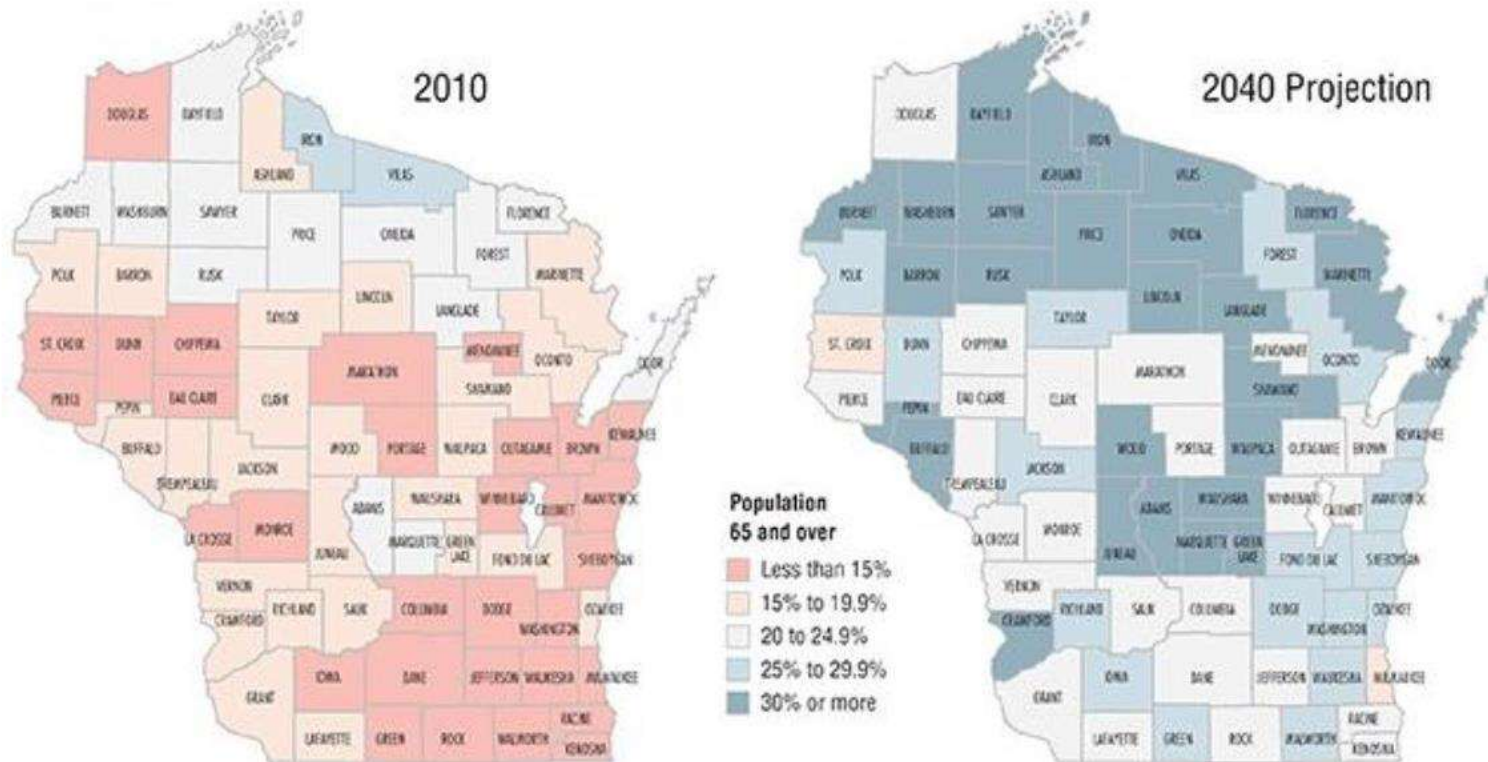


Loss of 25-54 year-olds 2007-2017





Graying Wisconsin 40+ counties projected to be 25% 65+



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...The Stage is Set.



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Recent Lessons Learned

- Never let a great good employee go
- Most new hires continue job shopping for 6-12 months after being hired
- Traditional hiring and onboarding practices no longer work
- Expect to pay more for less



Intended Outcomes

- Understand current labor markets
- Define Onboarding
- What new EE's expect from you
- Example onboarding Steps/Key Timing
- Defining and introducing your culture and expectations
- Retention and re-recruiting



Onboarding Defined

The **process** of integrating a new employee with a company and its **culture**, as well as getting a new hire the **tools and information** needed to become a productive member of the team.

Onboarding new hires at an organization should be a **strategic** process that lasts **at least one year** because how employers handle the first few days and months of a new employee's experience is crucial to ensuring **high retention**.



Onboarding Defined

Great resource - SHRM

<https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/new-employee-onboarding-guide.aspx>

The 5 “C's” of Effective Onboarding include a focus on

- compliance, clarification, **confidence, connection, and culture.**



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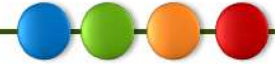
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Start Early

- Too many employers don't have any structured process in place to assimilate new employees
- Orientation is NOT onboarding
- Space is clean, technology is prepared, welcome swag is on their desk, "we care about you"
- New hires are looking at other jobs
- Ghosting is everywhere
- What are they saying at the dinner table?

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What Is Your Employee Experience?

- Treat your people better than your best customer
- Check-in after 3 months, 6 months, 1 year, 3 years
- It's not a benefit, if I don't think it's a benefit!!
 - 25-year-old: Student loan repayment
 - 35-year-old: Health care for my kids
 - 45-year-old: 401(k) match
 - 55-year-old: Vacation
 - 65-year-old: Medigap
- Flexibility in shifts, hours, remote work
- Treat them well when they leave, they'll be back!!



Example Onboarding Plan

End of the first day

End of the first week

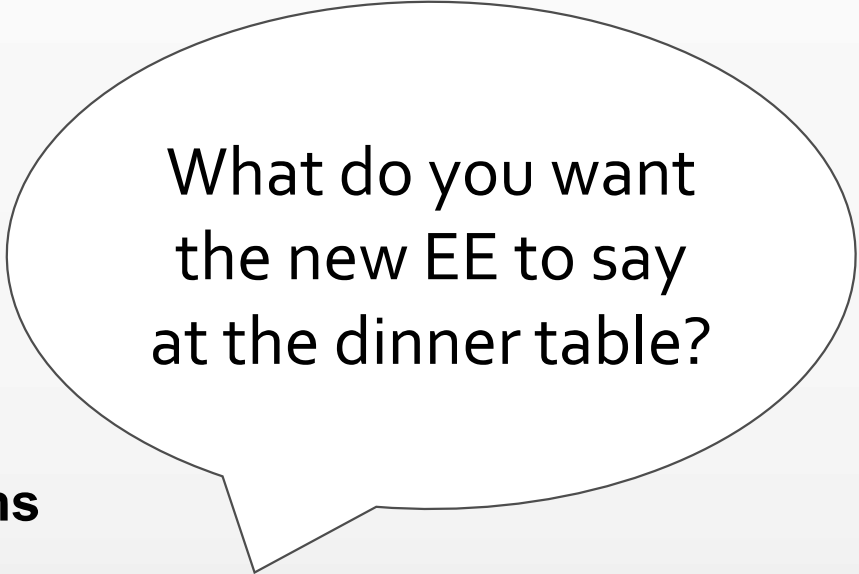
End of the first month

End of the first quarter – 3 months

At 6 months

At 9 months

At 12 months



What do you want
the new EE to say
at the dinner table?



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“Stupid Simple”

Dr. Patricia Greco



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'Less is More'



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Example Onboarding Plan

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End of the first week

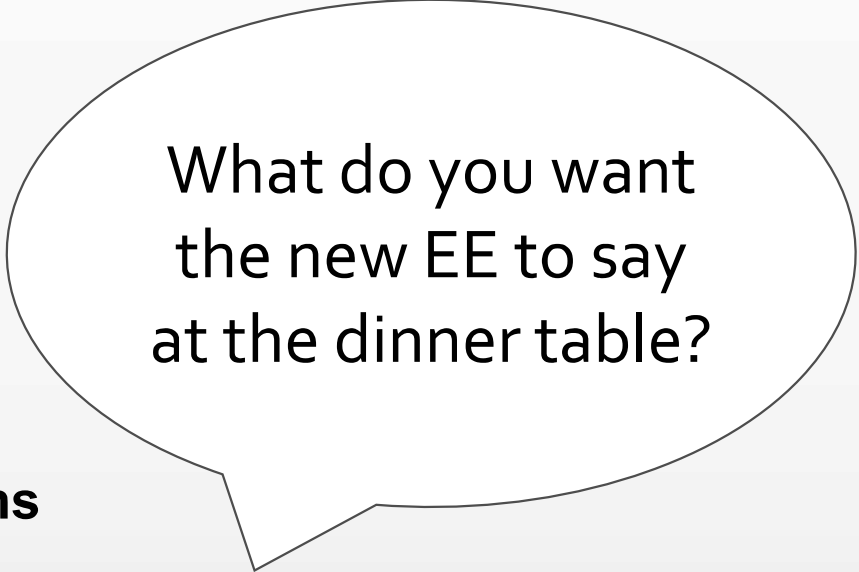
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Ask Them with a Simple Check-In

What is going well?

Pain points?

Shout outs?

What can I do to help you?



...Teach and Practice the Tools,
Expectations and Culture of your
District.



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What Are You About?

ENGAGE

LEARN

IMPROVE



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Our Mission

Engage. Learn. Improve.

Our Vision

The relentless pursuit
of excellence,
one person at a time.

Falls Pride School District of Menomonee Falls



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What is your culture?



Our employees have named us a top workplace seven times in a row!

Accountability

- Be responsible and follow through with important actions
- Own each problem that comes to you
- Look beyond your defined role to add value
- Act honestly and ethically
- Do the right thing even when no one is looking
- Act as an owner—treat district resources as if they were your own, and stakeholders as if they were your family

Teamwork

- Work with others to help the district achieve goals
- Work together in a supportive manner by being dependable, trustworthy and flexible
- Celebrate success and have fun at work
- Help coworkers and customers feel valued by recognizing them for doing something that helps the school district achieve goals

Respect

- Appreciate the diversity in others
- Display a positive and empathetic attitude toward others
- Maintain confidentiality and respect privacy at all times
- Value the opinion of others

Professionalism

- Take personal ownership to improve
- Strive to be the best every day
- Model learning
- Recognize others for a job well done
- Maintain a strong work ethic

Communication

- Smile, make eye contact and greet others in a positive manner
- Communicate with sincerity, honesty, and respect
- Actively listen without interrupting and without judgment
- Speak clearly without using terms that are unfamiliar to the customer
- Return phone calls or emails in a timely manner

Belief Statement

In the School District of Menomonee Falls we respond quickly to serve our customers in a kind and friendly way by listening and owning problems to achieve customer focused solutions.

The
New York
Times

JS



Carnegie Foundation
for the Advancement of Teaching

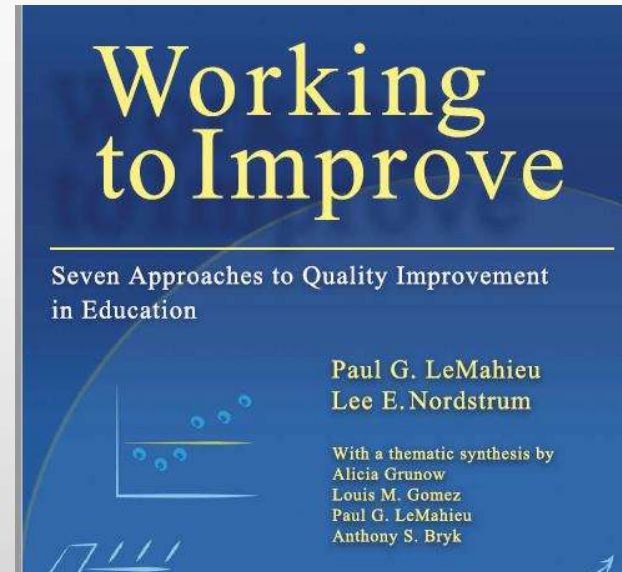
DA District Administration
Leadership Institute

Most Recent National Recognition...

District of Distinction from District Administration Leadership Institute

Featured in Working to Improve Carnegie Foundation

Guam Department of Education



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College and Career Readiness

Proficiency & Growth

- Reading
- Math

Closing the Achievement Gaps

ACT

Advanced Placement

- Participation
- Performance

Graduation Rate

Service

Parent Survey

Student Survey

District Support Card

Engaged Employees

Staff Performance

Employee Engagement Survey

Health & Safety

Suspensions

Attendance

Workers Compensation

Return on Investment

Bond Rating

Balanced Budget

Efficient Operations

Our Values

Achievement

Service

People

Health and Safety

Return on Investment



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Tools we use to Improve Belonging and Culture



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High Performer Rubric

(See Handout)



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How do we hold ourselves and each other accountable?

System Scorecards

Site and division scorecards compile more detailed measures linked to the core pillars.

				SCALE	Rating
Quality Student Achievement Summary	Student Learning Goals	16-17	Number of Student Learning Goals Met (Appendix 1)	50%	5= 12 goals
		6 of 12			4= 10-11 goals
		15-16			3= 7-9 goals
		8 of 12			2= 4-6 goals
		14-15			1= 0 to 3 goals
		8 of 10 goals Met			
People	*Employee Engagement Survey	16-17	Score in a range of 4.16 to 4.27 on Employee Engagement Survey. (see *notes)	5%	5 = 4.50 or above
		4.49			4 = 4.28 - 4.49
		15-16			3 = 4.16 - 4.27
		4.41			2 = 3.91 - 4.15
		14-15			1 = 3.90 or below
	District Long Range Goal =4.5	4.45			
		13-14			
		4.13			
People	Adult Learning Framework Key student survey question results	16-17	Score in a range of 3.88 to 3.99 on key questions from the Student Survey.	10%	5 = 4.50 or above
		3.85			4 = 4.00 - 4.49
					3 = 3.88 - 3.99
					2 = 3.30 - 3.87
					1 = 3.29 or below



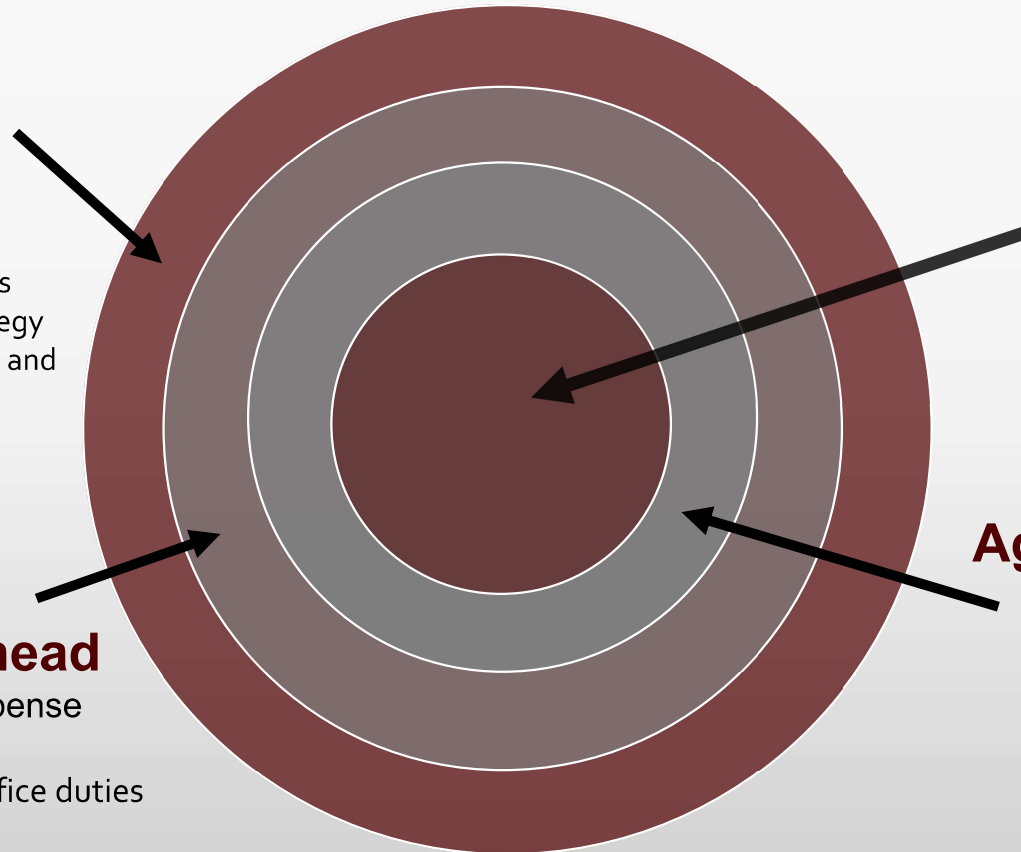
Strategic Target – Finance/Business Services

Experiment & Explore

- Employee Intranet
- Full paperless timesheets
- Financial Software Updates
- Self-funded health plan strategy
- Long-term enrollment, facility, and financial planning

Establish Beachhead

- Electronic employee expense reimbursements
- Cross-training key business office duties



Best in Class

Strategic Resource Planning
Service Excellence
Leveraging Technology

Aggressively Develop

- ACH vendor payments
- P-Card purchasing
- Budget Entry

How we improve?



Using the simplest tools for the problem at hand.

- Decide on the toolkit
- Establish a team
- Charter
- Baseline data where appropriate and establish a clear goal

	THE SOLUTION IS SIMPLE	THE SOLUTION IS COMPLEX
THE SOLUTION IS KNOWN	JUST DO IT All employees are empowered to make improvements.	PROJECT MANAGEMENT Key leaders will be trained in project management and empowered to lead these improvements with the support of project sponsors.
THE SOLUTION IS UNKNOWN	PDSA All employees will be trained to work in the PDSA framework and make these improvements.	DMAIC Key leaders have completed belt training with oversight of a project champion will be empowered to work in this framework.



Simple Process Flowchart

Simple ROI

Simple Project Charter

Simple A3 Reports

Simple Plus Delta

Simple Run Chart

Simple PDSA

Simple Stoplight Report

Simple 5 Why's

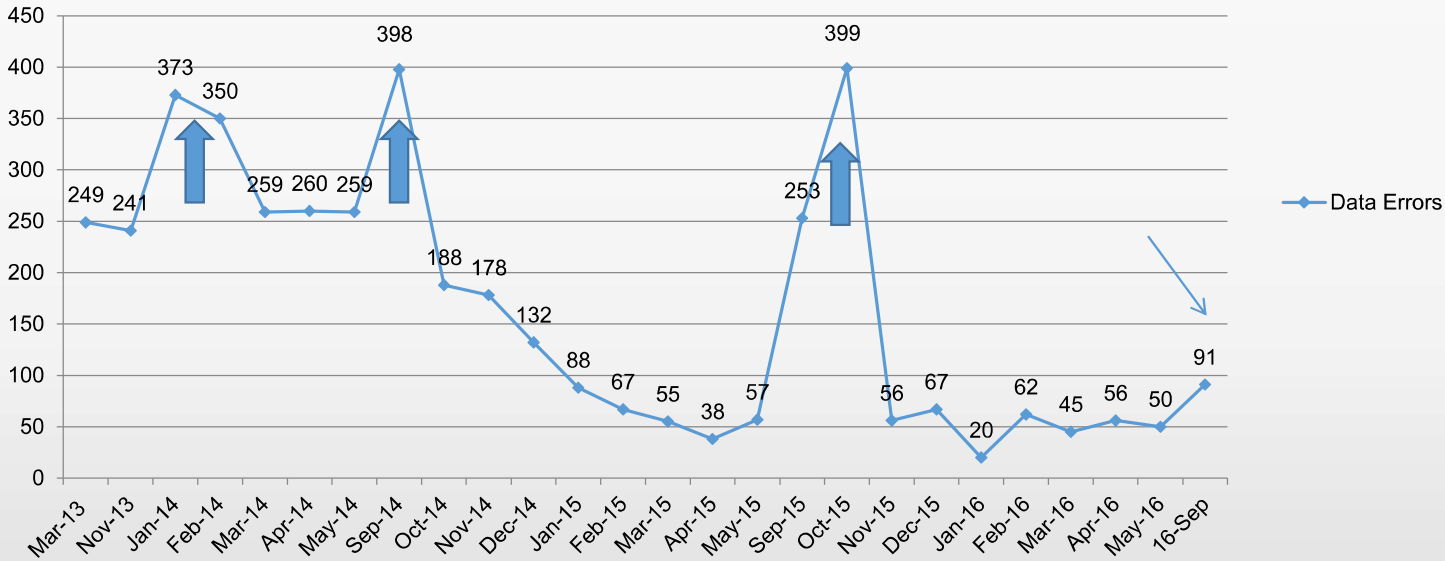
Simple Bullseye

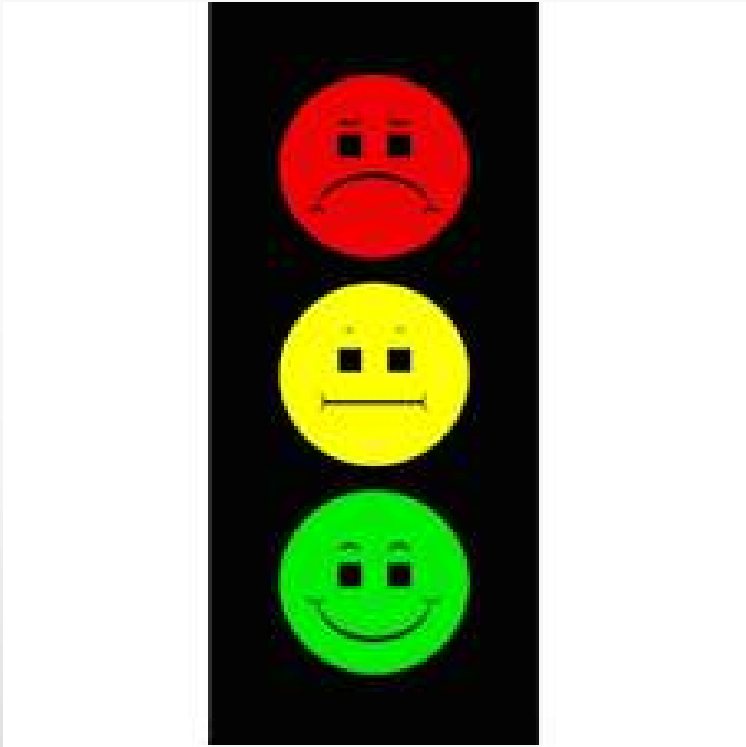


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Simple Run Chart to Analyze a Problem





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Simple Stoplight Report



<u>Project Title for High School</u>	<u>Location</u>	<u>Not Done</u>	<u>In Progress</u>	<u>Completed</u>	<u>Target/Comp. Date</u>
Replace all roof ladders	H.S.	X			
Update all outlets to GFIC in pool area	H.S.			X	1/25/2016
Move and remodel weight room to aux. gym	H.S.			X	9/1/2016
Add new signage for classrooms	H.S.			X	10/1/2018
Install new Air Handling Unit in new weight room	H.S.			X	10/28/2016
Add glass to stairwell doors #1&2 (4 doors total)	H.S.	X			
Replace entrance mats in bus entry	H.S.			X	1/6/2017
Resand main gym wood floor and replace VCT tile floor	H.S.			X	9/1/2016
Add lights to exterior of building by the pool ramp for soccer	H.S.	X			
Trim bushes by exterior windows to 2-3ft high	H.S.	X			

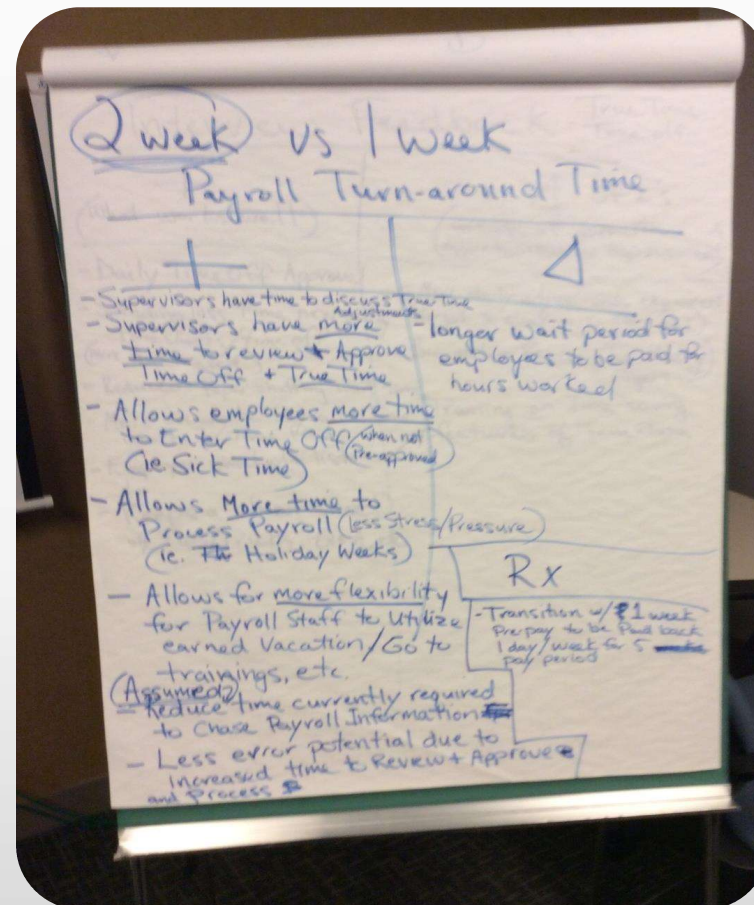


Simple Plus, Delta

What is going well?

What is not going well?

How can we fix it?

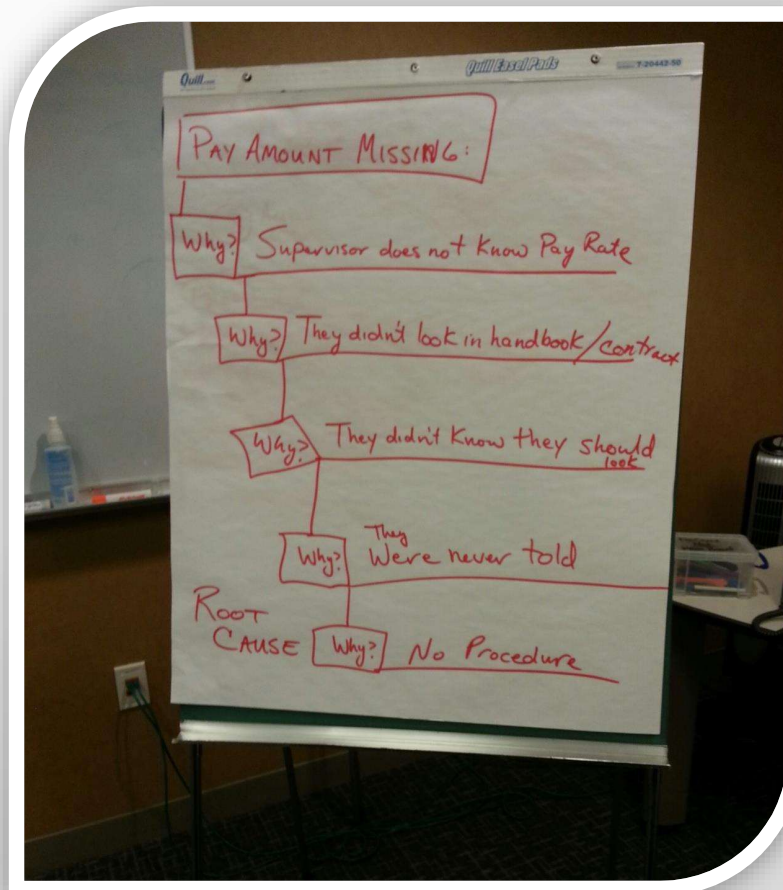


Simple 5 Why's?

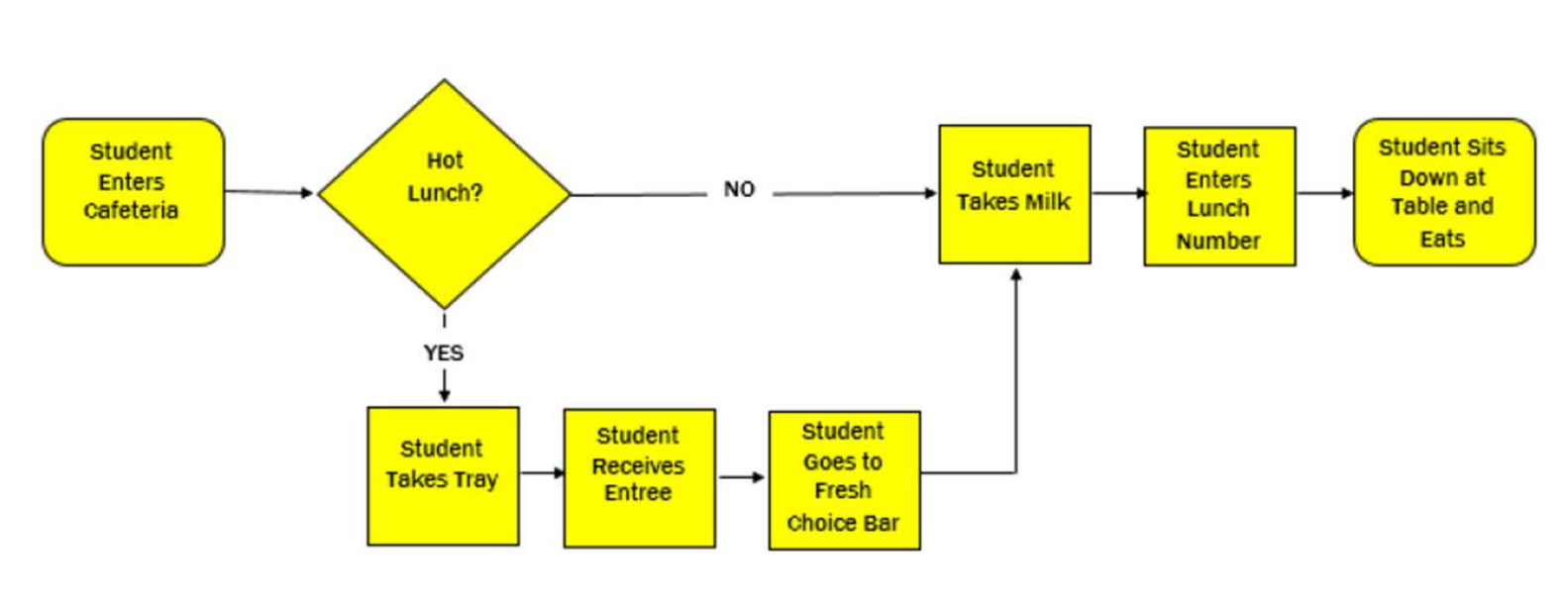
Root Cause Analysis...

"5 Why's?"

- Why?
- Why?
- Why?
- Why?
- Why?



Simple Process Flowchart

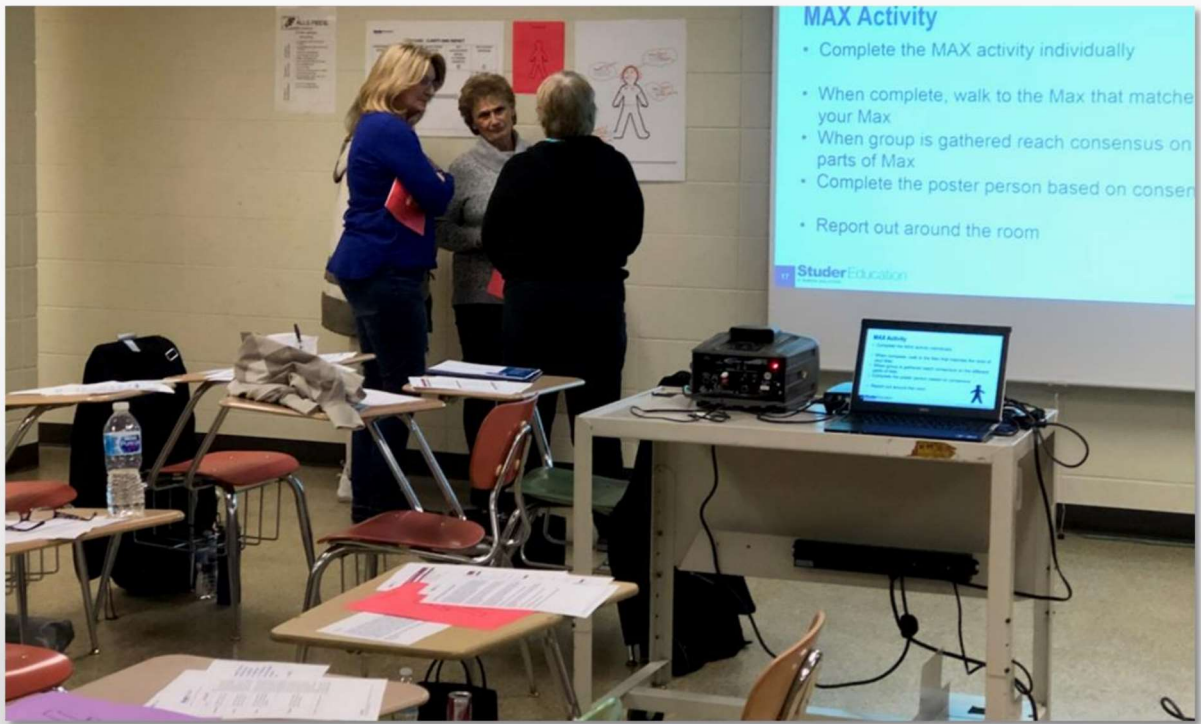


Simple Bulletin Board



Displays your teams' improvement work

Our School Nutrition Team in Action



So, at this point, if you are a new EE to SDMF you have a pretty good idea of what we are about and how your job fits and supports our purpose.



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Retention and Re-Recruitment...

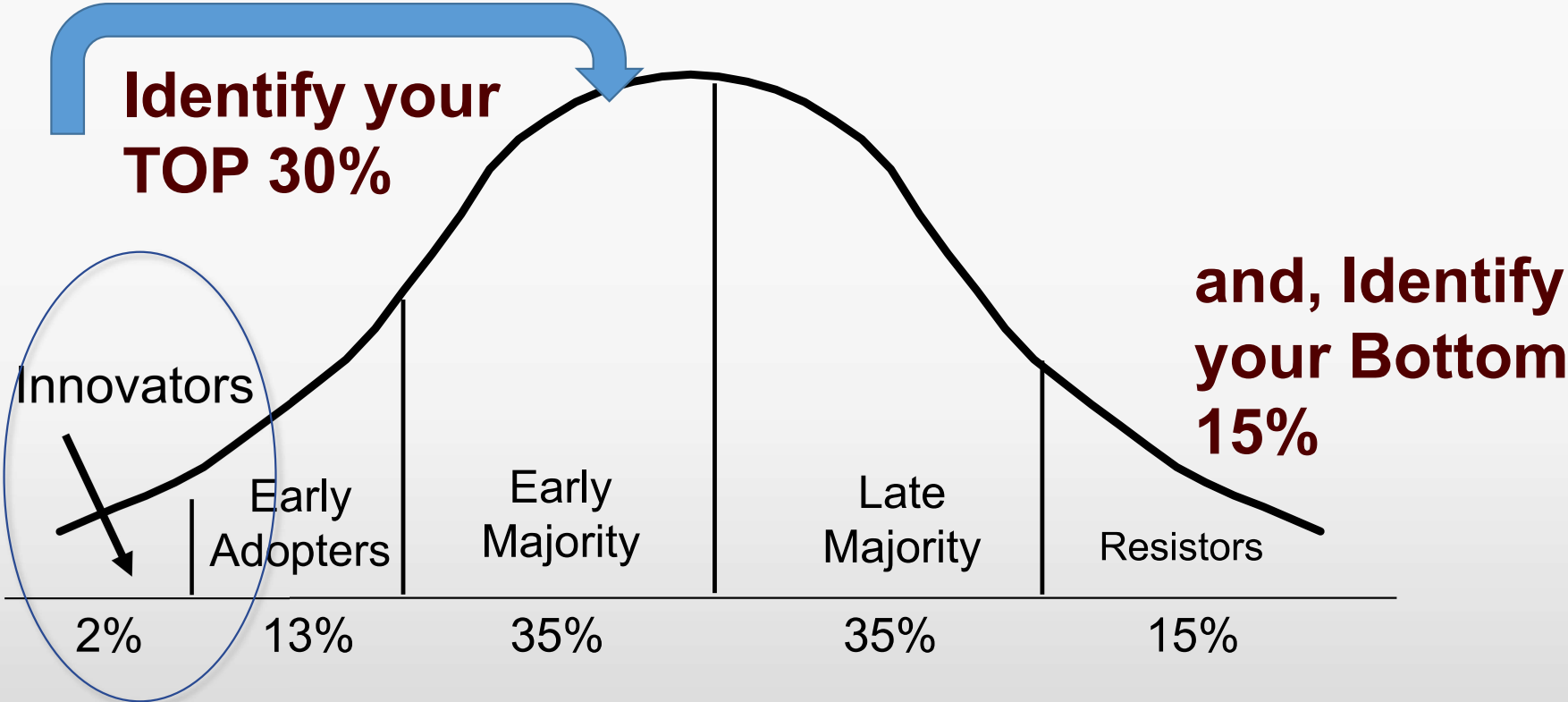
**Think of this as the 'Control' aspect
of that is part of CI science and
LEAN thinking.**



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Be OK with the Idea of 'Human Capital'



Succession Planning/Career Pathways

- Identify key positions that need a plan for replacement or coverage
- Identify potential candidates: both internal and external
- Determine what skills and knowledge is needed for position
- Map out a plan for internal candidates: Commit to PD
- Provide a year at a glance for all key positions
- Provide cross training and job shadowing



What does the new EE want?

(it's not about what you want)



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Example Onboarding Plan

End of the first day – my workspace was clean and I met some nice people. *I know where to find the bathroom.*

End of the first week – I've met some more people. There is a friendly, helpful, and patient vibe when I have questions.

End of the first month – I know my core job duties. I continue to meet more people and I have the support I need to learn my job.

End of the first quarter/3 months – My supervisor and others continue to be supportive and check in with me. I see how my job supports the District.



Example Onboarding Plan

At 6 months – I have been recognized for my hard work and effort (even the Superintendent has publicly recognized me). I continue to be happy with the support and culture.

At 9 months – I'm now almost a year into my new job and continue to feel like I belong. I am able to participate in my own growth and that of the District.

At 12 months – I see a clear career pathway here at the District. I continue to be recognized for my work and feel that I am part of the District. My work matters.



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How do you know? Ask Them with that Simple Check-In

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What can I do to help you?



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Thank You and please feel free
to reach out anytime.

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262-255-8374



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