

# STAFF DEVELOPMENT AND TRAINING: NEW STAFF ORIENTATIONS

1-C



Job Performance  
Situation 1:  
Orienting New  
Staff

HEAD START  
*MOVING AHEAD*  
COMPETENCY-BASED TRAINING PROGRAM



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## REFERENCE

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This activity develops skill competencies in *planning and implementing new staff orientations*. Participants will learn how to initiate new staff into the Head Start organizational culture and provide ongoing job performance support. They will be able to anticipate and develop a plan for addressing new staff needs. They will receive an in-depth tour of the orientation process and learn how to design an orientation session. Participants will also learn how to engage all staff in the orientation process and how to link new staff orientation to ongoing staff development

Related skill activities include 1–D, Staff Development and Training: Leading a Guided Discussion; 1–E, Individual Development: Giving Feedback; 1–F, Individual Development: Developing Learning Plans.

*Sources.* Smalley, L. *On-the-Job Orientation and Training*. 1994. Irvine, CA: Richard Chang Publications. Training Guides for the Head Start Learning Community, *Leading Head Start into the Future*. 1997. Washington, DC: U.S. Department of Health and Human Services. Minor, M., *Coaching and Counseling: A Practical Guide for Managers and Team Leaders*. 1995. Menlo Park, CA: Crisp Publications.

## New Staff Orientations

**Outcomes.** Participants who complete this activity will be able to

- understand the role and benefits of new staff orientation
- design an initial orientation session
- assess the effectiveness of new staff orientation efforts

**Materials.** Newsprint and markers

### Components

This activity can be done by one person, an informal group, or a formal workshop. We have provided suggested times, but participants and facilitators may wish to adjust these to their own timetables.

Step 1. Worksheet: Reflection	30 min.
Step 2. Background Reading: The Essentials of New Staff Orientation	20 min.
Handout: Orientation Tools	15 min.
Step 3. Worksheet: Planning an Initial Orientation Session	45 min.
Step 4. Summary	10 min.
Suggested total time	2 hrs.

This activity contains 22 pages.

# STEP 1. WORKSHEET: REFLECTION

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Suggested time: 30 min.

**Purpose:** To help participants reflect on the types of support and direction they received when they began working in the Head Start system.

Part I (10 min.)

1. Think about your first day on the job as a Head Start employee. How did you feel? If you have been with Head Start for a long time, reflect back on a community situation where you were new. In either case, include your first impressions.

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2. What made your first days and weeks on the job a positive experience? Be specific. For example, think about how you were welcomed, how you were introduced to other employees, how you learned about the ins and outs of your job, etc.

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3. What more could your supervisor or co-workers have done during your first few weeks to ease the transition into your job?

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4. Think about your first few months at Head Start. What were the most difficult aspects of your work?

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5. What types of support and direction, either from your supervisor or co-workers, would have helped you meet the challenges you were facing?

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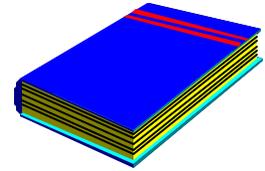
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Part II (20 min.) If you are working in a group, discuss your responses with another member of the group.

# STEP 2. BACKGROUND READING: THE ESSENTIALS OF NEW STAFF ORIENTATION

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Suggested time: 20 min.

Study the following reading. Feel free to highlight sections or write comments in the margin throughout these activities.

## I. PURPOSE

New Head Start employees at both the local and federal levels need support and direction to perform their jobs in sync with the spirit, vision, philosophies, and future directions of Head Start.

New staff orientation is an in-depth process. It needs to be carried out over time, not in one meeting on the employee's first day of work. Conducted in the right way, orientation can integrate new employees into the organization and prepare them to function effectively and successfully.

Competent planning for new staff orientation takes into account the unique needs of each new employee. The content, structure, and time frame will vary for different job functions. Some new jobs reflect transfers or promotions within Head Start. Or staff may come from agencies or organizations that are affiliated with or do the same type of work as their new employer.

A thoughtful, well-organized orientation will

- help reduce the anxiety that the new staff person is probably feeling
- foster a positive attitude toward and impression of the organization
- address the diverse needs of each new staff person
- answer critical questions
- establish and reinforce performance expectations

Now let's consider the essential elements of new staff orientation.

## There's Only One Chance to Make a First Impression

The first day on the job is often a stressful experience for new employees. They face many unknowns. Besides learning about the basics of their new job, they have to get acclimated to a new organizational environment, new managers, and new co-workers. It is the organization's responsibility to establish a good first impression in initiating new employees.

Here are five ways in which organizations can ease the transition of a new employee.

1. Always have someone available to welcome a new staff person at the door. A new employee should not get the impression that his arrival was unexpected or, worse, not planned for!
2. Do not overload new employees with paperwork before they have had an opportunity to be formally welcomed.
3. Make sure ahead of time that new staff have been assigned an office or work space that is adequately equipped, and that all equipment and furniture are in good working order. If new employees, such as teachers, are responsible for equipping their own work space, make sure that they receive guidance on ordering supplies and equipment.
4. If new employees will be required to attend any meetings or off-site appointments on their first day of work, let them know before they arrive.
5. Make sure that the high level of enthusiasm and constant communication that are used to recruit new staff are in place on the first day and maintained during the orientation and beyond.

## Introduce New Staff to the Head Start Culture

Regardless of their function in the organization, integration into the Head Start culture can instill a sense of belonging and commitment among all employees. An effective orientation would include discussion of the following.<sup>1</sup>

- Mission: Purpose of the organization
- Accepted behaviors: Accepted language, and demeanor
- Norms or standards: Acceptable daily behavior

<sup>1</sup> Adapted from Training Guides for the Head Start Learning Community, *Leading Head Start into the Future*. 1997. Washington, DC: U.S. Department of Health and Social Services, p. 65.

- Values: Collective beliefs about what is important
- Philosophies: Guiding principles behind policies and procedures
- Rules and customs: Professional conduct and accepted practices
- Climate: How the organization is perceived

## Help New Staff Begin Their Job

An effective orientation assists the employee in learning the ins and outs of the new job. It clarifies performance expectations; it defines initial tasks and assignments. It is best to review the job description in detail and to familiarize the new employee with co-workers, work-space facilities, benefits and accounting procedures, and meeting schedules.

***Reviewing the Job Description.*** The job description takes on new significance on the first day of work. This is why a review of the job description is an important part of the orientation. It should cover

- an overview of primary job responsibilities
- the interrelationship between the new employee's job functions and those of other staff within the organization
- identification of immediate and long-term training needs (for more information see 1–F, Staff Development and Training: Developing Learning Plans).

Clarify performance expectations, including the quantitative and qualitative requirements for the job. Let the new employee know what to expect concerning conduct on the job, working relationships with other staff and clients, and measures for appraising future performance.

Reinforcing performance expectations during new staff orientation is important for another reason: it sets the tone for how the new employee and her immediate supervisor will communicate about critical performance issues, such as

- applying knowledge and skills to job tasks
- maintaining an acceptable level of work quality
- demonstrating accountability and follow-through on tasks

With performance expectations clear, the new employee is almost ready to begin work.

***Getting Started.*** Supervisors have the most intimate knowledge about the new employee's job and are vital to the planning and implementation process.

They need to prepare the employee to begin work by providing the following thorough introduction:

- Review the assigned office or work space (e.g., classroom) with the new employee. Make sure that the employee has the equipment she needs and knows how to operate it. Make sure that office and classroom supplies and other job-related resources are adequate.
- Give her a tour of the work-space facilities, particularly areas that she will regularly use or will be responsible for. Office tours are a great opportunity to engage other staff as guides and to help the new employee begin to establish relationships.
- Establish the new employee in the organization's benefits and accounting system. Show her how to complete time sheets, benefits claims forms, and requisitions for equipment and supplies. Provide an introduction to the organization's travel and expense reimbursement policies and procedures, if travel is part of the job.
- Introduce the new employee to key co-workers, members of the work team, and key personnel from other areas of the organization. Identify who can provide information or answers to questions. Co-worker introductions can also be part of specially planned events during the orientation: presentations, breakfast meetings, luncheons, or work sessions.
- Review the schedule and time frames for staff and management meetings, work meetings, and lunch hours.

Get the new employee started with tasks or assignments that will help her transition into her job. Decide in advance what tasks she can do during the orientation period, with the benefit of support from her immediate supervisor and co-workers. Avoid burdening a new employee with a major work assignment before she has had the benefit of an appropriate orientation.

## II. METHODS

Orientations should be structured with the following in mind:

- the amount and type of information, guidance, and direction required to effectively and adequately prepare the new employee for work
- the nature, scope, and complexity of the new employee's job as well as the environment in which he will work
- the amount of time that the new employee will be given to begin performing

at a functional level

- the organization's commitment of resources to the orientation process

Described from the standpoint of the employee's needs, the content, focus, and length of a new staff orientation need to take the following into account:

*What the new employee needs to know:* What type and complexity of information, knowledge, and skill are required for the job?

*When the new employee needs to know it:* What does she need to make it through the first day, the first 30 days, the first 6 months, and so on?

*How the new employee needs to receive it:* Does the position require formal training, coaching, or on-the-job training?

## After the Initial Orientation

The first week of the orientation helps new staff (1) understand their roles and responsibilities; (2) engage in specific work assignments; (3) form working relationships with other team members and co-workers; and (4) develop a deeper understanding of the principles and values inherent in the Head Start culture. But the orientation should not stop there.

**30 to 90 days later** Many organizations consider the 30- to 90-day period a probationary or trial period. This is usually the time before employee benefit programs take effect. It is the time when the organization and the new employee explore the mutual fit. Task performance and the potential need for further guidance and training are generally addressed during this period. This is an appropriate time to do the following:

- Review the orientation plan and solicit feedback from all involved as to its effectiveness
- Answer outstanding questions and clarify concerns regarding processes and procedures
- Elicit feedback from co-workers and team members as to the new employee's progress
- Increase the number and complexity of job assignments if the new employee is ready to move ahead
- Identify additional training and development needs

*Six months later* The six-month point is also a good time to assess and adjust staff orientation activities and ongoing staff development. It is also an appropriate time for a mid-year performance appraisal. The appraisal will determine whether the employee has absorbed the information and training received in the past six months and is ready to take on more complex tasks.

### III. POINTS TO REMEMBER

Consider the following points as you plan and implement the orientation:

- Begin planning for the orientation by identifying (1) the general information that all new staff need and (2) the information needed for the new position. You may find it useful to work with a checklist like the one provided in the Orientation Tools Handout.
- Spread orientation activities over a reasonable time frame to avoid overloading new employees. Prioritize the information (e.g., distinguish what the employee must know on the first day from what can wait until a week or a month later). Set up a priority matrix like the one shown in the Orientation Tools Handout.
- Customize the orientation plan so that it takes into account the employee's level of experience, the complexity of the job, and other factors.
- Orienting staff is not a job for supervisors alone; it requires the commitment of everyone within the organization. Staff can help new employees set up the office or work space; serve as job task coaches, mentors, or "buddies"; and assist in other ways.
- Successful orientations require feedback from all involved, including the new employee. Supervisors can meet with the new employee during the first few weeks to answer questions and solicit her impressions of the orientation experience. This information can then be used to make needed changes to the orientation program.

# HANDOUT: ORIENTATION TOOLS

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Suggested time: 15 min.

This handout contains five orientation tools for your review:

- Orientation Checklist
- New Staff Information Priority Matrix
- New Staff Orientation Plan
- Sample New Staff Orientation Agenda Day 1
- Sample Orientation Guidebook Table of Contents

## ORIENTATION CHECKLIST

- \_\_\_ 1. **Provide essential resources and materials**
  - \_\_\_ Mission, values, and philosophy
  - \_\_\_ Program guidelines and standards
  - \_\_\_ Program procedures
  - \_\_\_ Organizational chart
  - \_\_\_ Job description
  - \_\_\_ Employment policies
  - \_\_\_ Other
- \_\_\_ 2. **Review job description and performance expectations**
- \_\_\_ 3. **Review work schedule (including lunch breaks and procedures for signing in or out)**
- \_\_\_ 4. **Review payroll policies and procedures**
- \_\_\_ 5. **Review key administrative policies and practices**
  - \_\_\_ Requests for leave
  - \_\_\_ Holidays
  - \_\_\_ Vacation
  - \_\_\_ Dress code
  - \_\_\_ Office appearance
  - \_\_\_ Regular report submission
  - \_\_\_ Conduct and discipline standards
  - \_\_\_ Health and emergency procedures
  - \_\_\_ Time sheet procedures
  - \_\_\_ Office security
  - \_\_\_ Ordering of equipment and supplies
- \_\_\_ 6. **Conduct introductions to immediate co-workers and other key staff**
- \_\_\_ 7. **Review standard meetings to attend**

Meeting	Purpose	Date/Time

- \_\_\_ 8. **Conduct tour of program and organization facilities**
  - \_\_\_ New employee's office
  - \_\_\_ Supervisor's office
  - \_\_\_ Other key staff offices
  - \_\_\_ Meeting rooms
  - \_\_\_ Classrooms
  - \_\_\_ Parking facilities
  - \_\_\_ Emergency exits
  - \_\_\_ Library
  - \_\_\_ Supplies and storage areas

- \_\_\_\_\_ Kitchen and eating areas
- \_\_\_\_\_ Restrooms

\_\_\_\_\_ **9. Review and demonstrate critical equipment and systems**

- |                            |                        |
|----------------------------|------------------------|
| _____ Computer and printer | _____ Project software |
| _____ Telephone(s)         | _____ Voice mail       |
| _____ Fax(es)              | _____ E-mail           |
| _____ Photocopier(s)       |                        |

\_\_\_\_\_ **10. Present initial job assignments**

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\_\_\_\_\_ **11. Schedule or assign additional training**

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\_\_\_\_\_ **12. Plan and schedule special events**

- \_\_\_\_\_ Lunch with program or organization director
- \_\_\_\_\_ Breakfast or lunch with co-workers
- \_\_\_\_\_ \_\_\_\_\_
- \_\_\_\_\_ \_\_\_\_\_

\_\_\_\_\_ **13. Other**

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## New Staff Information Priority Matrix

Time Frame	Priority Rating		
	A. Critical Needs (Know Immediately)	B. Important	C. Nice to Know
<b>First day</b>			
<b>First week</b>			
<b>30 days</b>			
<b>90 days</b>			

## NEW STAFF ORIENTATION PLAN

Employee name: \_\_\_\_\_

Start date: \_\_\_\_\_

Initial Activity	Manager or Staff Responsible	Date to Be Conducted	Total Time Allotted	Date Completed	Comments

## Sample New Staff Orientation Agenda Day 1

Activity	Time
▪ Welcome new staff person	7:30 a.m. – 8:15 a.m.
▪ Complete benefits, accounting, and other paperwork	8:15 a.m. – 9:30 a.m.
▪ Meet with supervisor	9:30 a.m. – 10:30 a.m.
▪ Give tour of facilities and introduce key personnel	10:30 a.m.– 11:30 a.m.
▪ Attend introductory luncheon with members of work team	11:30 a.m.– 1:00 p.m.
▪ Meet with program director	1:00 p.m. – 1:30 p.m.
▪ Meet with administrative director	1:30 p.m. – 2:00 p.m.
▪ Set up office and computer	2:00 p.m. – 4:00 p.m.
▪ Meet with supervisor at end of day	4:00 p.m. – 4:30 p.m.

# Sample Orientation Guidebook

## Table of Contents

New employees cannot be expected to retain all the information they receive initially about the organization or program, their co-workers, and their job. An orientation guidebook can be used as a reference at any time. Consider a sample table of contents. You can use it or one like it to develop a guidebook for new employees. Update the guidebook regularly.

### Introduction

- Welcome Letter from Program Director
- Orientation Plan
- Orientation Agenda

### I. Organization and Program Information

- History, Values, Philosophy
- Organizational Chart

### II. Job Information

- Job Description
- Job Assignments
- Staff Development Plan

### III. Staff Information

- Staff Roster with Phone Numbers
- List of Staff by Position and Responsibility

### IV. Facilities Information

- Facilities Floor Plan with Staff Offices and Other Key Areas Marked
- Instructions for Voice-Mail and E-mail Systems

### V. Other



## STEP 3. WORKSHEET: PLANNING AN INITIAL ORIENTATION SESSION

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Suggested time: 45 min.

**Purpose:** This worksheet will give participants an opportunity to select (or create) a profile of a new Head Start employee, then plan an orientation to meet the individual's needs.

Part I (15 min.)

### *Profile 1*

**Carlos** is a 25-year federal employee. He has just received a lateral transfer from the Office of Family Assistance (OFA) to Head Start. His most recent job at OFA was to monitor and provide guidance to a number of demonstration projects within the states aimed at supporting welfare reform efforts. His new job at Head Start will require him to perform similar monitoring tasks with the local Head Start grantees in his region. Carlos is totally unfamiliar with Head Start except for information he picked up during joint meetings with Head Start staff while he was at OFA.

### *Profile 2*

**Lori** was recently promoted to the position of child development services manager. She has worked in La Paloma for five years, as a teacher for three years and as a center manager for two years. In her most recent position, she demonstrated strong supervision skills and a sound knowledge of child development. In her new role, she will need to manage partnerships with several local education agencies in your service area. She has no experience in working with outside organizations and seemed to be nervous when she made a presentation before the entire Head Start staff.

### *Profile 3*

**Brenda** has worked in the Atlanta regional office of Head Start for two and a half years as an administrative assistant while working on her master's degree in public administration. She completed her degree and recently received a promotion to the position of program

specialist. Shortly after her promotion, Brenda relocated to another federal office because of a change in her husband's job. She is now working with a new Head Start unit, with a new supervisor and new co-workers. During her years as an AA she learned a great deal about Head Start. She even occasionally volunteered for special activities at the Head Start center in her community. Since her hiring, several program specialists have commented on Brenda's lack of knowledge of Head Start administrative functions.

#### ***Profile 4***

***John*** has recently been hired as a family services manager. He holds an MSW, and before joining La Paloma Head Start, he was a social worker with a local mental health organization. The references you interviewed as part of the hiring process said that he has excellent interpersonal skills and understands the issues facing children and families in your community. He is new to Head Start, however, and has never held a management position before. He is thrilled that the family workers seem to like him: they ask him to meet with the families that are a challenge to them.

From these four profiles, select an employee who would fit into your own organization. Or create a profile of an employee you recently hired. Then develop an orientation plan for this person by completing the Information Priority Matrix and the first four columns of the New Staff Orientation Plan in this handout. Use the Step 2 Background Reading, the Orientation Checklist, and the Sample New Staff Agenda as resources.

Answer the following questions after you fill in the Priority Matrix and the Orientation Plan:

1. What information does the new employee need?
2. In what time frame does she need this information?
3. What type of support will she require from co-workers and supervisors, and why?



4. How extensive will the orientation need to be for the new employee?
5. What supportive materials would you provide or develop for the new employee?
6. What supportive training would you provide?

Part II (25 min.) Share and discuss your plan with the other members of your group. Guide your discussion with the following questions:

1. What were the major differences in each of the plans, (e.g., time frame of orientation, content)?
2. What was the most difficult task in planning an orientation: For each profile? In general?
3. Were there factors in any of the profiles that impeded your doing an orientation as you would have preferred?
4. What are the two or three most important things you learned about planning an orientation for new staff?



## STEP 4. SUMMARY

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Suggested time: 10 min.

### Key Points

- The purpose of new staff orientation
- Strategies for addressing new staff needs
- The role of the supervisor
- Staff involvement in orientation

### Personal Review

What did you learn from this activity?

1. \_\_\_\_\_  
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3. \_\_\_\_\_  
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How will you use your new knowledge and skills in your work?

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2. \_\_\_\_\_  
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3. \_\_\_\_\_  
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What other things do you think you might need to learn in order to master the skill of planning and implementing new staff orientations?

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