**Director Onboarding & Administrative Guide**

This guide is intended for director onboarding and to clarify expectations, responsibilities and processes.

**Onboarding and Director Expectations**

 **New Director Activities**

* **Required reporting:**

List what reports the director is required to complete on a daily, weekly, monthly, quarterly, annual basis.

* **CRM and lead generation:**

Describe what system you use, how leads are collected and your expectation on follow-up.

* **Email and voicemail messages:**

Email and voicemail should be checked and responded to throughout the day. We do not require our employees to check email during the evening or on the weekends unless there is a specific reason or circumstance.

* **Engagement with staff and families:**

Describe expectations on family engagement activities, intentional touches, etc.

* **Conflict resolution and problem solving:**

Describe how you resolve conflict and your expectations on leadership in ensuring conflict with families and staff are resolved properly.

* **Provide classroom, kitchen and other support as needed:**

Describe expectations on helping in the classroom and other areas of the center as needed.

* **Management classroom ratios and teacher schedules:**

Discuss the importance of watching payroll, keep ratios, etc.

* **Manage teacher call-outs:**

Discuss how teacher call-outs are handled and ways to reduce them.

* **Give tours, enroll families, manage waitlist:**

Discuss how to give tours, the information to collect, closing a tour, the process of enrolling families and managing the waitlist if applicable.

* **Conduct new hire orientations:**

Discuss requirements of a new hire process and documentation required.

* **Participate in personal growth and development:**

Describe professional development expectations of both the director and the staff.

 **Weekly Activities**

* **Cleaning inspections:**

How the director should ensure the center is clean.

* **Ensure teachers completing daily reports, sharing pictures:**

What is the process, who reviews them, expectations?

* **Curriculum:**

Describe curriculum expectations and standards along with the audit process.

* **Payroll:**

How to process and manage the payroll process.

* **Inventory and supply ordering**:

How do teachers order supplies, budgets, etc.

* **Tuition and billing:**

Discuss family billing, FTE expectation and audit to ensure billing is the correct amount. How often tuition increases and the ability to make exceptions, offer credits, add on days, etc.

* **Classroom observations:**

How often the director should observe in the classroom and what should come from the observations.

**Bi-Weekly Activities**

* **Teacher meetings (one-on-one’s)**:

Intentional one-on-ones with staff and the expectation on how often and outcome/documentation.

* **Meet with leadership team to keep pulse on tasks, vision, culture, staffing, enrollment:**

If the director has other leaders in the center, conduct meetings to keep discussions on vision, culture, hiring, enrollment.

* **Review job postings:**

Participation in job postings and interviews. Maintaining ads and conducting new posts to advertise positions and other culture attracting posts.

* **Enrollment forecasting:**

Forecast enrollment out and share new openings as needed.

**Monthly Activities**

* **Curriculum inspections:**

Spot check curriculum lesson plans etc.

* **Accreditation training:**

Provide accreditation training to staff and share new topics and refreshers on old topics.

* **Licensing trainings:**

Provide training on licensing to staff and share new topics, consistent violations and refreshers on old areas that need revisiting.

* **Prepare and review various management reports:**

Timely produce required reports.

* **Budget/Credit Card usage:**

Prepare credit card and other budget required items.

* **Fire Drill:**

Make sure fire drills and other required drills occur and are documented.

* **Staff meetings:**

Host monthly staff meetings and ensure the agenda with signatures of attendees is maintained.

* **Snack and Lunch menus (if applicable):**

Update snack and lunch menus or ensure they are updated and meet nutrition guidelines.

* **Classrooms: injury, behavioral, illness, and cleaning logs:**

Check in on classroom logs

* **Parent newsletter or other parent communication:**

Complete all parent communications that are required.

* **Employee rewards, incentives, gratitude:**

Give out rewards, incentives and appreciation as earned.

* **Gather staff and family testimonials:**

Get new staff and family reviews and testimonials - google, facebook, written and video.

* **Community outreach:**

Determine monthly community outreach for the center to participate in.

* **Business outreach:**

Reach out to businesses to partner with, cross market with, build relationships.

**Quarterly Activities**

* **Quarterly inspections:**

Conduct and document quarterly inspections

* **Disaster drill:**

Conduct quarterly disaster drills to ensure staff remain familiar with disaster plans.

* **Immunizations:**

Review immunizations and update records as expired.

* **Professional Development Plans:**

Complete professional development plans with staff.

* **Update Emergency book:**

Update any contact information as needed.

* **Physician forms in children files / Make sure all files are up-to-date:**

Ensure this is completed at least quarterly.

* **Review child transitions:**

Prepare for any child transitions that are coming. Include communication with families and teachers to ensure a smooth transition.

**Biannual Activities**

* **Parent / Teacher Conferences:**

Coordinate the scheduling of parent/teacher conferences and ensure staff are prepared to handle a professional meeting with families.

* **Deep clean of the center:**

Coordinate a deep clean of the center to meet cleaning guidelines and expectations.

**Annual Activities**

* **Child file review:**

Review child files for expired documentation and ensure the files are complete per licensing standards.

* **Licensing Renewal Fee:**

Complete any licensing continuation renewals.

* **Staff Evaluations:**

Conduct timely staff evaluations per the center's schedule of performance measurement and coaching.

* **Director Evaluation:**

Conduct self evaluation on your own performance and work with the manager to get feedback.

* **Tuition tax statements for families:**

Gather tax statements for families.

* **Planning of special programs:**

Prepare and schedule any special programs intended to assist with either family or employee engagement.

* **School pictures:**

Coordinate school picture day.

* **Summer camp prep and planning (if applicable):**

Coordinate summer camp prep both of activities but also enrollment of families with intent to be full by March each year.

* **Strategic planning:**

Work with manager and team to strategically plan and measure progress to prior year goals.

* **Staff and family surveys:**

Conduct and analyze staff and family surveys. Discuss results with staff and families including action plans for areas that need improvement and celebrating wins for areas of success.

* **Review and conduct other drills and emergency procedures**
* A**ccreditation review:**

Conduct any accreditation update and review of quality per requirements.

* **Policy/Handbook review and updates**

**Relationship Building Activities**

* **Consider ways to continuously improve center culture:**

Make an intentional plan on ways to build relationships with the staff and encourage collaboration and teamwork. Plan events, activities and other collaboration techniques to make a company where staff want to stay.

* **Methods for bonding with staff:**

Consider ways you can build relationships personally with the staff

* **Engage with families intentionally:**

Make a plan of ways to engage with families either through check ins, phone calls, meet n greets, or other methods.

* **Develop support team:**

Build a team around you so you can have support and a peer group to interact with.

* **Coach staff:**

Be a mentor and a coach to help build relationships with team. How can you individually help your team grow and develop?

**Director Professional Development**

* **Leadership and business training:**

Continue developing in your craft! Identify business and leadership training that will help you do this.

* **Conference attendance:**

Identify any conferences you would like to attend, why and what impact they would have on you, your team, the center.

* **Participate in relevant association(s) and groups:**

Identify and sign up for associations and other groups that will impact you, your team, the center, the early education industry.

* **Self development activities:**

Identify other self development activities to better yourself not just professionally but personally.

* **Book study:**

Host a book study with your peers and/or your staff.

Administrative Team Guide

Complete administrative manual for running our schools

**“Typical” Weekly Schedule For Admin Team**

Director

|  |  |
| --- | --- |
| Monday |  |
| Tuesday |  |
| Wednesday |  |
| Thursday |  |
| Friday |  |

Assistant Director

|  |  |
| --- | --- |
| Monday |  |
| Tuesday |  |
| Wednesday |  |
| Thursday |  |
| Friday |  |

Administrative Assistant

|  |  |
| --- | --- |
| Monday |  |
| Tuesday |  |
| Wednesday |  |
| Thursday |  |
| Friday |  |

Kitchen

|  |  |
| --- | --- |
| Monday |  |
| Tuesday |  |
| Wednesday |  |
| Thursday |  |
| Friday |  |

**For a complete list of center** [**duties access here**](https://docs.google.com/spreadsheets/d/1nI2c5bCYOFPxDFr8MMm5ExZfnBW8FWGkIUF1SI7MR7Y/edit?usp=sharing)

**Organization Chart**

|  |
| --- |
| Administrator/OwnerVision and Direction/ Core ValuesLeadership DevelopmentBudget and FinancesOperating SystemsMarketing |
| Assistant DirectorFamily & Employee Experience and SatisfactionFamily billingStaff payrollBenefits managementAccreditation Reporting |
| Center DirectorClassroom ObservationsCurriculum & Best Practices AlignmentFamily & Employee Experience and SatisfactionAnnual Review FeedbackLeading and Managing StaffHiring and FiringFinancial Growth and ProfitabilityMarketing |
| Administrative Assistant |
| Coke |
| Lead Teachers |
| Assistant Teachers |

**Administrative Activities**

Include any procedures needed to perform the various office tasks

**Vision & Company Direction**

As the center director it is extremely important you understand the vision and values of the company and perpetuate that down to your team. You do this by modeling the behavior you are looking for, keeping the vision and values in front of your team in creative ways, and by evaluating your staff based on how they live the vision and values.

**Uphold Company policies (families & employees)**

One of the most important things to do as a leader is to ensure that we not only set clear expectations but we must uphold them. Clear expectations will reduce rework, confusion, incomplete work and excuses from your team. Think of ways you can set clear expectations and hold yourself, your team and your co-workers accountable to those expectations. Some areas this applies include:

* Safety and security
* Cleaning
* Policies
* Customer service
* Core values
* Education of children
* Care of children
* Teamwork & collaboration
* Engagement: We expect our team to engage with families at all times, especially when a family enters the facility. To help with family and staff engagement, directors should do a quick check-in to see how they are doing (parents: do you have any concerns, are you satisfied, how can we serve your family better; employees: are you stressed, can we provide you help with anything, do you have all the resources you need)
* Accountability

**Goal Setting**

Planning and goal setting is important to ensure the center and staff remain innovative and forward thinking with the intention to always be improving. Planning should not just happen once a year. Monthly you should reflect on goals, progress to those goals, and celebration when goals are achieved. Keep yourself and the team motivated and excited to keep moving forward.

**Facility & Assets**

Our facility must be ready to impress at all times to ensure our current staff and families are happy, to make an impression on potential new families and potential new staff. Daily processes should occur to make sure the facility is in great shape.

* Facility management
* Vendor management
* Improvement plan
* Asset management
* Exterior look (parketing, cleanliness)
* Playground (mulch, safety, improvements)
* Cleaning expectations/checklists: Having a clean facility is very important to us. Cleaning checklists should be completed for both the interior and exterior of the facility. Director should walk around daily to visually check how clean the center is.
* Lawncare

**Kitchen & Food Program**

Appearance, cleanliness and organization in the kitchen and food prep/eating areas should be monitored at all times.

* Supervise kitchen staff
* Menu (creating & updating)
* Lunch (prep/serve/clean up)
* Snacks (prep/serve/clean up)
* Develop & monitor food program
* Clean kitchen & eating areas
* Ensure adequate kitchen supplies/food

**Health & Safety**

Our number one priority in child care! Health and safety of children, families and staff must be at the forefront of everything.

* Monitor center entry points
* Ensure safe drop off and release of children
* Obtain necessary business Insurances
* Oversee incident reports
* Establish and follow-through on illness procedures
* Allergies, children w/special needs, dietary
* Medical log books
* Medication administration
* Monitor and resolve safety hazards (inside facility & outside facility)
* Safety policies and procedures
* State Licensing notifications

**Transportation Safety and Procedures**

Transporting children requires many different precautions and safety measures. Make sure procedures are in place, staff are continuously trained on procedures, vehicles are maintained, and the children and staff are safe at all times.

**Behavior Management**
Whether you have the experience or you enlist support from professionals, it is important to offer support to your staff on how to handle behavior issues in our children. Communicating with parents is extremely important when there are behavior issues. Any questions or concerns on how to handle situations, see your manager for additional support.

* Documentation Forms
* Behavior Improvement Plan Policy
* Disenrolling Child/Family

**Marketing & Brand Awareness**

* Use phone script
* Email campaigns
* Lead generation: A lead is anyone that inquires about enrollment. The inquiry can come in through website, email, walk-in, phone. We expect center directors to immediately follow-up on any inquiry within 24 business hours. If there is no response, the director should follow-up at least one more time.
* Toy Box will automate lead follow-up. Directors are expected to maintain pipelines and ensure custom fields are completed when necessary.
* Website
* Marketing for enrollment and for hiring: You may not make the marketing materials but the entire leadership team should help initiate marketing initiatives, plans and work at getting the centers name out there in the community.
* Social media
* Sell your story in the community
* Ensure alignment with branding
* Take amazing photos of staff and children to capture values and vision
* Conduct center tours: Directors should be ready to give tours at any time. At the start of a tour, collect all contact information for further follow up. Additionally, make sure to ask how they heard about the center so we can track the marketing channels that are working. During the tour, guide families through the center pointing out ways we live our core values. Speak to what is most important to them in terms of child care. At the end of the tour, sit with them and close the enrollment by asking them to sign up today. If we do not have room for the family, put them on the waiting list.
* Waitlist management: Daybreak Academy centers are often managing waiting lists. Directors must ensure spots are filled once they open. Generally, spots are filled with current families first (ie, siblings); Then the waiting list is opened up to external families.
* Start at the top of the waitlist.
* Contact them by phone and email and give a 48 hour window to hear back
* If no interest, move onto the next person in line
* Process is managed on an excel spreadsheet
* Ensure adequate supplies of marketing materials
* Always be ready to impress new/current employees and families

**Outreach & Business Development**

Build relationships with schools, businesses, vendors, the community to establish partnerships that will ultimately help our community, our center, and our families and teachers.

* School relationships
* 4K collaborative counsel
* Community outreach
* Business outreach
* Collaboration with parents in specific professions

**Family management & Retention**

Family relationships are critical! Be intentional with how you build and maintain these relationships.

* Create raving fans out of all families
* Send parent emails regarding various updates, check-in's, etc
* Schedule & follow through with intentional touches with parents
* Handle & resolve parent complaints
* Provide parent coaching as needed
* Maintain child files
* Parent handbook
* Center events (children)
* Greet families at arrival & departure
* Meet with families transitioning in the center
* Meet with families transitioning to another program
* Conduct yourself professionally on the telephone
* Respond to parent emails in a timely fashion
* Provide excellent customer service
* Resolve parent conflicts & concerns
* Be respectful and empathetic
* Communicate center happenings to families
* Provide opportunities for family involvement
* Plan center wide family events

**Staff Management & Retention**

Our staff is everything! Being the best manager is necessary because we want to provide an environment for our team to thrive. Let’s retain our staff by being the best leader and coach possible.

* Create raving fans out of all employees
* Job description development
* Carry out center expectations
* Facilitate leadership meetings
* Manage teacher call-in’s: Staff must call the center director if they are not going to be at work. Attendance should be monitored and performance reviews should reflect poor or good attendance. Organize and provide bonuses for good attendance at staff meetings.
* Continuing education management & professional development: We expect all employees to strive for continuous growth. At a minimum staff should meet required continuing education hours. For our leadership team, we expect them to look for opportunities for professional development hours to maintain licenses or memberships. Directors should remain vigilant with staff to ensure they are meeting their professional development hours. There may be times when the company provides center-wide training and the director should assist with organizing these events, getting teachers to attend and ensuring follow-up on lessons learned.
* Talent developer
* Time off management
* Monitor cell phone use
* Plan & implement employee events
* Make staff schedule
* Provide lunch break coverage
* Maintain a teaching staff board
* Perform classroom observations: The director should observe all classrooms to ensure staff is following procedures, to stay in touch with staff, and to observe activities. Each classroom should be visited at least once a week.
* Complete performance evaluations
* Provide opportunities for team building
* Execute monthly staff birthday activities
* Reward above & beyond performances
* Resolve staff conflicts
* Perform disciplinary actions
* Terminate employees when necessary
* Email Casey employee termination information

**Recruitment (Place ads, get noticed)**

Attracting top talent happens through hard work. We can’t just hire sitting at our desks. Once they become an employee, we must ensure various things are completed so we are compliant with State Licensing.

* Hire (interview/observation)
* Background checks & fingerprinting, etc.
* CPR/First Aid/Shaken Baby & other required
* State Registry Program (annual updates)

**Office Administration**

The office must be organized and efficient. Be familiar, set a schedule and get support to complete the many tasks necessary to run a childcare center.

* Pay bills
* General supply orders
* Classroom supply orders
* General emails
* Provide amazing customer service
* Answer phones

**Perks and Benefits**

Know and understand all perks and benefits. Stay in tune to what our competition offers, and continuously look for ways to offer more/better benefits.

* Employee incentive program
* Employee benefits & perks
* Family benefits & perks

**Classroom & Programs**

Our programs really define who we are. Stay in tune as to how the staff is performing in this area, satisfaction of our families, growth of the children and innovative opportunities.

* Prepare child rosters for daily attendance
* Manage classroom ratios & teacher schedules: We do not guarantee 40 hours a week for teachers. Generally teachers are scheduled around 38 hours for lead teachers. Directors should watch schedules in and out times to ensure they are scheduled appropriately. Overtime should be monitored and hours should be in alignment with budget. At any time, when ratios are low, directors should suggest staff leave to reduce the payroll expense.
* Spearhead licensing in the classroom
* Conduct classroom observations
* Ensure proper classroom environments
* Train on and review child portfolios
* Conduct curriculum training
* Review & train on lesson plans
* Enforce child discipline guidelines
* Ensure timely and smooth child transitions
* Schedule field trips
* Ensure successful and safe field trips
* Conduct employee staff meetings
* Review daily sheets/child communication
* Summer camp program development
* Putting out fires
* Support teacher's writing curriculum
* Edit curriculum
* Submit curriculum into Google Drive
* Print and distribute curriculum to classes
* Weekly planner, newsletter & schedule at glance displayed
* Purchase curriculum needs at WalMart/Amazon/Dollar Tree

**Technology**

Use of technology in and out of the classroom should make us more efficient. Continuously analyze the technology that is used and seek training where needed for you and your staff.

* Review & innovate - classroom technology
* CRM/Lead management software
* Parent management/billing software
* Computers & other equipment
* Setup and manage emails
* Other communication tools
* Internet use and social media policy

**Childcare Billing System**

* Input new families
* Billing
* Process payments
* Monitor receivables & maintain minimum threshold
* Input physicals
* Print sign in/sign out sheets
* Input new staff
* Input staff pictures

**Parent Communication Tool/App**

* Input new families
* Monitor pictures and reports sent out

**InspireCare 360**

* Input new families and staff
* Send emails regarding special events/reminders
* Send notification of illnesses to parent and post on entry doors
* Send weekly staff newsletter (Peek at the week)

**State Licensing Requirements**

* Build staff awareness through training
* Ensure staff are adhering to regulations
* Ensure staff are maintaining ratio & group size
* Submit maintenance requests with level of urgency (to Dennis)
* Make certain that maintenance tasks are completed
* Maintain medication forms/records
* Maintain children's files (binder/Procare and hanging file)
* Maintain staff files (binder/Procare and hanging file)
* Maintain consultant logs
* Provide opportunities for staff development
* Maintain records of professional development
* Ensure staff professional development hours are met (By June 30th)
* Maintain first aid kits
* Conduct monthly fire drills & complete environment/facility checklists
* Conduct quarterly lock down drills (plus all others listed)
* Provide Annual Training for staff (policies & procedures)

**Accreditation Standards (Apple)**

* Monitor classroom portfolios
* Maintain program portfolio
* Submit required annual paperwork for accreditation

**Human Resources**

* Ensure that staff accident reports are completed for injury within 24 hours
* Address claims of workplace mistreatment immediately (documents on staff complaint form)
* Submit Workers' Comp Claims
* Develop and oversee employee incentive program
* Employee benefits
* Employee perks

**Hiring & Onboarding**

The onboarding process for new hires is critical to the long term success of an employee's work cycle. Follow the center onboarding procedure when a new hire starts. Assign a mentor based on the classroom and location of the new hire.

* Manage Indeed/Facebook Ads
* Conduct interviews
* Oversee working interviews
* Send interview summary to \_\_\_\_\_\_\_\_\_\_\_\_
* Hire employees
* Collect and verify required documents
* Set up a staff file with state required documents
* Set up an Daybreak Academy file
* Send out fingerprints
* Assign a mentor to new employees
* Monitor the mentor program
* Ensure completion of Inspire Care 360 courses
* Ensure completion of DCF training
* Email Casey new hire information
* Ensure new staff get CPR & first aid certified

**Payroll**

* Input new staff
* Submit deductions / changes for payroll
* Maintain timecards
* Submit payroll hours and notes

**Ready to Impress/Professionalism**

* Perform daily walk throughs
* Maintain the physical plant by monitoring wear-n-tear, cleanliness, safety
* Maintain a professional appearance
* Ensure staff maintain professional appearance & positive attitude
* Ensure excellent customer service
* Answer phones quickly and politely
* Maintain a positive attitude
* Ensure centers are ready to impress by look, smell, sound

**Required reporting**

The following are the various reports that need to be completed: daily, weekly, monthly, quarterly, annual basis:

* Weekly report to owner
* Monthly report to owner
* Expense reports
* Office enrollment board

**Facility**

Note things specific to the maintenance, upkeep and other important reminders about the facilities.

**Vendors:**

* Vendor list of approved vendors for purchases and repairs

