

New Staff Onboarding Checklist

A comprehensive Montessori-specific onboarding guide for guides, assistants, and administrators.

How to Use This Checklist

This checklist is not a single-meeting document. Use it to structure the first two to four weeks of a new staff member's onboarding — distributing topics across conversations rather than overwhelming a new colleague with everything on day one. The rightmost columns track who is responsible and whether each item has been completed.

Staff Name: _____	Start Date: _____
Role / Level: _____	Supervisor: _____
Onboarding Lead: _____	Buddy / Mentor: _____

Operations & HR

Item	Notes / Links	Initials	Done
Pay schedule and direct deposit setup	Include payroll contact info		■
Keys, access codes, and building security	Note alarm instructions		■
Benefits overview and enrollment window	Include HR contact		■
Full building and campus tour			■
Emergency procedures: fire exits, drill schedule	Location of emergency binders		■
Staff directory and org chart	Link or share file		■
School calendar and key dates	Link to master calendar		■
Contact tree and communication protocols			■

Curriculum & Montessori Practice

Item	Notes / Links	Initials	Done
Overview of curriculum approach by level			■
Literacy approach and materials used	Include decodable/phonics sequence		■

Alignment study process and annual focus	Link to alignment calendar		■
Standards alignment documentation	Link to relevant docs		■
Great Lessons expectations (Elementary)	Link to sequence		■
Work journal vs. work plan expectations			■
Guidelines for supplemental materials			■
Technology use policy by level			■

Assessment & Record Keeping

Item	Notes / Links	Initials	Done
Assessment tools by level	Link each tool		■
Assessment calendar for the year	Key dates highlighted		■
Data storage platform and access	Include login process		■
Previous year's data review	Schedule dedicated time		■
Lesson planning tool and expectations	Demonstrate platform		■
Progress report format and timeline	Review example report		■
Portfolio approach and documentation			■
Transition and moving-up documentation			■

School-Wide Procedures & Community

Item	Notes / Links	Initials	Done
Attendance, tardiness, and dismissal protocol			■
Hallway and common space expectations			■
Children in crisis: protocol and contacts			■
Behavior approach and documentation			■
Family communication expectations	Newsletters, email norms		■
Conference expectations and note-taking	Review template		■
DEI statement and school-specific commitments			■
Social-emotional learning approach			■

Montessori Materials

Item	Notes / Links	Initials	Done
Classroom inventory location and process	Link to current inventory		■
Materials request and replacement process	Share request form		■
Supply request timeline and approval	Include due dates		■

Classroom setup standards and design guidelines		■
Care and handling of materials		■

Professional Development

Item	Notes / Links	Initials	Done
PD schedule for the year (all-staff)	Link to calendar		■
Level-specific PD expectations			■
Appraisal process and timeline	Link to appraisal template		■
Coaching schedule and one-on-one meeting format			■
Goal-setting process and documentation			■
Observation tools and schedule			■

Special Considerations

Item	Notes / Links	Initials	Done
Children with specific needs: overview and process			■
Special education or intervention partnerships			■
Going-out protocols (Elementary)			■
Annual traditions and special events	e.g., plays, camping, celebrations		■
Hiring and onboarding: your role going forward			■

Onboarding Notes

Use this space to document anything not covered above, questions raised, or follow-up items to revisit in the first 30/60/90-day check-in.
