



**CLEVER Bee**  
**ACADEMY**  
EARLY EDUCATION & CHILD CARE

**Department:** Marketing & Enrollment  
**Effective Date:** October 1, 2023

## **Guide for Enrollment Intake/Welcome Orientation Process**

**Purpose:** To streamline Clever Bee Academy's enrollment intake process to:

- Build trust and a good rapport with our families
- **Increase family retention & engagement**
- Increase family recruitment
- Provides a common message
- Result in better brand image (perception) of Clever Bee Academy program
- Actively engage and energize new families
- Address barriers to participation, communication and policies

The Enrollment Intake/Orientation is an extension of the Clever Bee Enrollment Process and begins once the parent has returned application, the application has been approved by corporate to issue a start date. See *CBA Enrollment Process Section for details on how to enroll a family*

### **Mandatory Guidelines:**

- Center Director or Assistant Director must be present on the family's start date and when they arrive to greet them and do intake/orientation.
  - Consider designated start dates (Ex. Monday, Wednesday, Friday or Tuesday and Thursday)
  - Suggested time for all newly enrolled family to arrive on the start date is 7:30am – 9:00am.  
Please note this is only for the first day.
- All **new families and return families over 1+ years** must go through orientation/intake and receive a welcome packet.

## Intake and Orientation Workflow Process

	Center Director Action Steps	Community Liaisons Action Steps	Marketing Dept. Action Steps
<b>BEFORE START DATE</b>	Contact Parent to give them start date and time to arrive on start date. Advise parents of all items needed on child's first day (change of clothes, bottle, etc.) Give overview of start date agenda and time commitment so parents can plan.	Distribute and replenish promo items to center	Order Promo Items
	Notify Marketing Dept. of projected starts for upcoming week due by Thursday. Additionally let them know if you need any welcome packet material		Create and upload all welcome packet documents to One Drive and The Hive and email to Directors and Liaisons
	Procare setup and Invite parent to create ProCare App		NA
	Notify Teacher and Staff of New Start so that child's cubby, name badge and additional needs setup before start date.		Email Director on Thursday for upcoming week enrollment projections
	Make sure you have enough welcome packets for projected starts for the week.  If not, please notify Courtney Harris at <a href="mailto:charris@brightsideohio.com">charris@brightsideohio.com</a> or your community liaison to obtain the items needed.  Tammy Merritt at <a href="mailto:tmerritt@brightsideohio.com">tmerritt@brightsideohio.com</a>		

## Start Date - Intake and Orientation Process

	Center Director Activity	Description	Approximate Time	Resources Needed
<b>START DATE</b>	<b>Welcome and Introduction</b>	Meeting family at entrance on the first date and Greeting family with big smile and welcome. Allow time to greet the child and let them know they will be going to class to meet their new teacher.	5 minutes	<ul style="list-style-type: none"> <li>– Big Smile</li> <li>– Great Attitude</li> </ul>
	<b>Child(ren) Drop off to Assigned Room(s)</b>	Walk family to class(es) to do teacher introduction and get child started for the day. Have the teacher show them where their cubby is located and any additional info that needs to be provided by the teacher.	5 minutes	<ul style="list-style-type: none"> <li>– Any teacher classroom documents</li> </ul>
	<b>Director and Parent Orientation</b>	Walk Parent back to office give parent welcome packet and agenda to review and discuss expectation and policies for: Use the <b>Check List and Signature for Parent/Director</b>	20-30 minutes	<ul style="list-style-type: none"> <li>– Enrollment Packet</li> <li>– Agenda</li> <li>– Completed Welcome Folder and Promo Items</li> </ul>
	<b>Parent Tour</b>	Show parents around the building to see where TAP tablets are located, share policy (time of service), Parent Resource Board, Children evidence of learning and development, etc.	10 minutes	<ul style="list-style-type: none"> <li>– Tablets</li> </ul>
	<b>Wrap-Up</b>	Take parents back to office. Ask if they have any questions. Thank them for choosing Clever Bee and walking to door	10 minutes	

## Internal Workflow of Welcome Packets and Swag Distribution

- Each center is to always have **10** completed Welcome Packets per age group at their center.
- Courtney Harris is responsible for ordering all marketing and promotional items.
- The Marketing Department will distribute and replenish swag and items as needed. ***Please contact the Marketing Department when you get under 5 swag bags.***
  - Tammy Merritt – Cleveland/Akron
  - Courtney Harris will assist as needed when visiting
- Welcome packets are to be given to all new parents and returning family +1 year on the enrollment start date Clever Bee during the orientation.
- **What goes in the Welcome packet?** The following items are to be given to parents on the start date:
  - Promotional Items (*Please note promotional items may change seasonally*)
    - Clever Bee Drawstring Bag
    - Clever Bee Keychain
    - Coloring Sheets with Crayons
    - Set of Stickers for Each Child Enrolled
    - Water Bottle
  - [Welcome/ Orientation Folder](#) (*Click to view document*)
    - [CEO Welcome Letter](#)
    - [Welcome Letter from Center Director](#)
    - [Clever Bee Family Onboarding Checklist](#)
      - [Review Subsidy Agreement](#)
    - [Important Reminder Document](#)
    - [Family Handbook Flier with QR Code](#)
    - [Family Referral Program](#)
    - [Procure How-To Flier](#)
  - Welcome Board Near Entrance – *Will be distributed out to all centers*
  - 30/60/90 Follow-ups

