New Employee Checklist

Employee Information
Name: _____________________________________________________  Start Date: ______________________
Mentor: ____________________________________________________

New Staff Member

During the First Week of Work
- Meet individually with co-workers to learn about their responsibilities, relationships and office organization.
- Call Human Resources (701-231-7065) for any questions on benefits, including health and life insurance, retirement, annuities, employee assistance program (EAP).
- Upload your photo and information at the Ag Info Center People record (username and password will be sent from Elizabeth Cronin in Ag Communication).
- Upload your photo and signature to Outlook (email).
- Upload your photo and information to the county website (if applicable).
- Record a voicemail message on your answering machine.
- Become familiar with the NDSU Extension website, for employees section and county website.
- Complete press release email sent from Ag Communication that is sent to local newspapers.
- Complete mandatory trainings
  - Baseline safety
  - Equal Opportunity/Title IX (to be completed within the first 30 days of employment)
  - Annual Notice of Policies
  - Designation of Medical Provider
  - IRB
  - Theft and Fraud/Code of Conduct
  - Defensive Driving (if needed for use of state fleet vehicle)

During the First Month of Work
- Continue orientation on the web.
- Review all materials in the welcome packet that was sent from the director’s office.
- Review the Communication Planning videos:
  - Communication Planning: Goals (5:50) – https://youtu.be/3BeF0T2B9Bg
  - Communication Planning: Key Messages (5:33) – https://youtu.be/FAzWBAdg23Y
New Staff Member – continued

During Months 2 to 6
- Schedule a campus visit with help from your district director. The district director will suggest things to do or people to connect with, including:
  - Tour of Ag Communication and get professional photo taken
  - Get Bison staff ID card
  - Work with Ag Communication staff on productivity tools
  - Meet with program leader relative to your program area (ANR, FCW, 4-H)
  - Meet with specialists relative to your program area (ANR, FCW, 4-H)
  - Meet with PFRC or EFNEP/FNP staff (if appropriate)
- Attend new staff orientation on campus (if offered during this time frame).
- Review the Ag Communication website for updated promotion and marketing ideas - www.ag.ndsu.edu/ext-employees/branding-and-communications.

District Director/Supervisor

Before the First Day of Work
- Communicate with the new staff member about housing options in the community or moving details. Stay in contact with the new staff member and indicate personal orientation plans for the staff member’s first day of work.
- Do an email introduction of new staff to all-ext and others as appropriate.
- Assign a mentor and advise the staff development coordinator of the assignment.
- Director’s office sends welcome packet that includes:
  - Cover letter
  - Who We Are document
  - Headset
  - Desk plate
  - Name badge
  - Information about email, eXtension, Ag Info Center, People database, electronic communication use
  - Information about how to order their Extension uniform/shirt.

New Staff Member’s Co-workers

Before the First Day of Work
- Prepare a computer (clean, assure connection and connectivity).
- Ensure work space, equipment and keys are ready for the new staff member.
- Send email about:
  - Office hours, parking, building information, attire
  - Lunch and breaks protocol

During the First Week of Work
- Host a coffee or lunch to welcome new staff.
- Introduce new staff to personnel in other offices in the building and community.
- Provide keys for the building and office.
- Do an office tour – work/storage spaces, etc.
- Order business cards/enclosures.
- Explain any county requirements (such as Active Shooter training, ID, badges, etc.)
- Describe:
  - Phone etiquette and voicemail recording – www.ag.ndsu.edu/

During the First Month of Work
- Help identify key contacts the new employee should connect with, contact or meet.
- Discuss:
  - Local advisory council
  - How needs assessments have been done locally
  - Program delivery methods used in the county
  - Program evaluation used in the county
- Review the local budget and budget management.

During Months 2 to 6
- Review the local budget and budget management.
Employees’ website (www.ag.ndsu.edu/ext-employees) and encourage staff to read through information within each link. In addition, point out links to:

- Employee self-service
- Quick link to Forms page
- Office 365
- PEARs
- Ag Info Center
- 4-H Enrollment and Registration

Review NDSU Extension’s “New Employees” website (www.ag.ndsu.edu/ext-employees/new-employees) briefly and encourage staff to read through information within each link.

Encourage a call to the district support staff member for assistance with:

- Procedures – expense vouchers, leave, travel (regulations for in or out of state, forms)

Inform/advise staff member of annual conference and encourage participation in the new staff dinner during annual conference.

Inform/advise staff member of new staff orientation and other upcoming training and professional development opportunities (Professional Development section of “For Employees”)

Reference first goals new employees should consider:

- Become “county-wise” – (refer to Handbook for Extension Agents)
- Meet and get to know local stakeholders and county officials
- Know who to go to when they have questions
- Programming resources
- Access resources/tools – show Ag Info site

Discuss:

- Extension calendar (website)
- Subject matter and skills training – $300 in first year available
- Appropriate attire
- County coordinator role

Have a conversation on mentoring

- Indicate who has been assigned as the new employee’s mentor
- Introduce new staff to mentor; launch exchange of bio-sketch between the two
- Arrange for introductions to a few key agency people and political stakeholders
- Review the mentor/mentee reporting expectations

Review major policies

- Expense forms, travel regulations and forms, leave policies

Complete mandatory trainings/forms as soon as possible – www.ndsu.edu/hr/training/annual_training/

**During the First Month of Work**

Suggest resources for demographics or key information:

- North Dakota Compass – www.ndcompass.org
- Kids Count Data Center – https://datacenter.kidscount.org
- U.S. Census - American Fact Finder – https://factfinder.census.gov
- North Dakota Department of Agriculture – www.nd.gov/ndda

Encourage connection with local officials.

Discuss the tuition waiver/discount, developmental leave.

Review additional orientation needs as requested.

**During Months 2 to 6**

Review orientation needs.

Review budget management.

PEARs – help new staff understand how to enter action plans, program activities, impact statement and quarterly efforts. Describe the expectation to new staff member regarding entries into PEARs and the timeline.

**After Month 6**

Review six-month progress reports from the mentor and mentee. Authorize compensation to mentor.

Determine whether to continue with the current mentor or assign a new mentor.

**Sometime Before Month 12**

Contact the mentor and new staff member to follow up on the mentoring process. Encourage continued informal mentoring as the relationship evolves to a colleague status.

Review the mentor’s and mentee’s 12-month progress reports and authorize compensation to the mentor.

Encourage staff member to begin entering plans into PEARs.
### Staff Development Coordinator

#### During the First Week of Work
- Make a welcome call to the new employee and briefly visit about the orientation process.

#### During the First Month of Work
- Make a phone call to the new employee to:
  - Review information and relationship on NDSU teaching, research and Extension
  - Review orientation needs
- Set up Skype with Volunteer Specialist for Character Traits of Successful Agent training.
- PEARS – help new staff understand how to enter action plans, program activities, impact statement and quarterly efforts. Describe the expectation to new staff member regarding entries into PEARS and the timeline.

#### During Months 2 to 6
- Review orientation needs.
- Encourage new staff member to schedule a campus visit, with authorization from district director to attend new staff orientation.
- Set up Skype with Volunteer Specialist for Character Traits of Successful Agent training.
- PEARS – help new staff understand how to enter action plans, program activities, impact statement and quarterly efforts. Describe the expectation to new staff member regarding entries into PEARS and the timeline.

#### After Month 6
- Review six-month progress reports from the mentor and mentee.

#### Sometime Before Month 12
- Review the 12-month progress reports from the mentor and mentee.

### Mentor

#### During the First Week of Work
- Make a welcome call and first contact with the new employee.
- Share a bio and photo.
- Provide introductory information.
- Request the mentee’s bio and photo.
- Visit the mentoring pages on the For Employees webpage to review the suggested framework.
- Review the mentor/mentee report forms.
- Schedule time to phone or Skype each other regularly.
- Visit about new staff orientation on campus (dates if scheduled and what the training entails).

#### During the First Month of Work
- Complete regular phone/Skype calls (at least two per month) and email as needed, and schedule the first face-to-face meeting for some time within two months of the new staff member’s start date (usually mentor visits mentee’s office).
- Visit about the mentee’s upcoming activities; look for opportunity to visit the mentee’s office and team up at one of the mentee’s programs or activities.
- Review the mentee/mentor webpage information, list of reports routinely due and list of specialists, and examine the mentee’s calendar.
- Establish specific goals for the mentor/mentee relationship and steps to meet the goals.
- Review suggested topics for discussion and suggested activities for the mentor/mentee and begin making plans. Choose one or two major topics or needs to explore in the next two to three months.

#### During Months 2 to 6
- Consider scheduling one or more of the following:
  - Mentee observing mentor teaching an educational lesson
  - Mentee observing mentor facilitating a meeting
  - Mentor’s visit to mentee’s office within two months of new staff member’s start date
- Continue to develop major topic/need items.
- Consider a second visit to the mentor’s office if needed. At the end of three months, take the opportunity to refocus. Review the mentee’s calendar
- Schedule the mentee’s visit to the mentor’s office within three months of the new staff member’s start date.
- Continue at least two phone/Skype calls during the month and email communication as needed.
- Review orientation needs.
- PEARS – help new staff understand how to enter action plans, program activities, impact statement and quarterly efforts. Describe the expectation to new staff member regarding entries into PEARS and the timeline.

#### After Month 6
- Review initial goals and assess progress. Visit if appropriate. Submit the six-month report to the district director and staff development coordinator.

#### Sometime Before Month 12
- Complete the 12-month progress report and submit it to the district director.
Campus Offices

During the First Week of Work
- Make a welcome phone call from an assistant director’s office to the new employee.

During the First Month of Work
- Center for 4-H Director provides welcome call and discusses:
  - Extension philosophy regarding 4-H and youth work
  - Program emphasis areas
  - Activities and events
  - Reporting
  - Youth Protection Policy (for new employee and volunteers the employee will manage)
  - 4-H Policies

During Months 2 to 6
- The volunteer development specialist reviews volunteer management information.
- The volunteer development specialist provides Skype training on Character Traits of an Effective Extension Professional.

New Staff Orientation Items Covered

On campus orientation should take place within the new employee’s first year of employment. It will include:
- Institutional Review Board training
- Facilitation
- Working as a Team
- Needs Assessment, Program Planning Reporting, Evaluation, PEAR
- Advisory Councils
- Networking and Teaching for Success
- Real Colors
- Adult Learning tips and techniques
- Working with Mass Media

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