

# NDSU Extension

## New Employee Checklist

Online at [www.ag.ndsu.edu/ext-employees/new-employees](http://www.ag.ndsu.edu/ext-employees/new-employees)

**For Extension Agents**

### Employee Information

Name: \_\_\_\_\_ Start Date: \_\_\_\_\_

Mentor: \_\_\_\_\_

## New Staff Member Tasks and Responsibilities

### During the First Week

- Meet individually with co-workers to learn about their responsibilities, relationships and office organization.
- Enroll in benefits. Refer to email sent to you from Maria Wingenbach or Human Resources (HR) for detailed information. Call Human Resources (701-231-8961) for any questions on benefits, including health and life insurance, retirement, annuities, employee assistance program (EAP).
- Process all materials in the welcome packet that was sent from the director's office.
- Access [www.ag.ndsu.edu/orientation/it](http://www.ag.ndsu.edu/orientation/it) to activate three online accounts (NDSU, NDUS, and Ag Info Center)
- 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 ([www.ag.ndsu.edu/agcomm/professionalism-representing-yourself](http://www.ag.ndsu.edu/agcomm/professionalism-representing-yourself)).
- Become familiar with these websites:
  - [www.ag.ndsu.edu/extension/](http://www.ag.ndsu.edu/extension/)
  - [www.ag.ndsu.edu/ext-employees/](http://www.ag.ndsu.edu/ext-employees/)
  - [www.ag.ndsu.edu/ext-employees/new-employees](http://www.ag.ndsu.edu/ext-employees/new-employees)
  - Your county's Extension website
- Reply to Ag Communication with information needed for a press release that will be sent to local mass media. If you haven't heard from Ag Communication within two days of your start date, contact Elizabeth Cronin.
- Begin Orientation on the Web - [www.ag.ndsu.edu/ext-employees/new-employees](http://www.ag.ndsu.edu/ext-employees/new-employees)

### During the First Month

- Continue Orientation on the Web.
- Review the Handbook for Extension Agents.
- Watch "Let's Make Work Better" – Theresa Glomb – TEDxUMN – [www.youtube.com/watch?v=oCYeEt94EMc](http://www.youtube.com/watch?v=oCYeEt94EMc).
- Access and become familiar with NDSU Extension's Advisory Councils website and PowerPoint slide show – [www.ag.ndsu.edu/ext-employees/advisory-boards-councils-and-committees](http://www.ag.ndsu.edu/ext-employees/advisory-boards-councils-and-committees).
- View NDSU professionalism video at [www.ag.ndsu.edu/agcomm/professionalism-representing-yourself](http://www.ag.ndsu.edu/agcomm/professionalism-representing-yourself).
- Read Managing Conflict publication (FS1563) – [www.ag.ndsu.edu/publications/kids-family/managing-conflict](http://www.ag.ndsu.edu/publications/kids-family/managing-conflict).
- Complete mandatory trainings at [www.ndsu.edu/hr/training/](http://www.ndsu.edu/hr/training/) (annual or specialty)
  - Baseline safety
  - Annual Notice of Policies
  - Designation of Medical Provider
  - Theft and Fraud/Code of Conduct (available in the Fall of each year)
  - Defensive Driving (if needed for use of state fleet vehicle)
- Complete mandatory training: Equal Opportunity/Title IX (to be completed face-to-face) - [www.ndsu.edu/equity/](http://www.ndsu.edu/equity/). Click "Register Now" and select this training on a date that works for you within your first 30 days.
- Complete mandatory IRB training at [www.ndsu.edu/research/for\\_researchers/research\\_integrity\\_and\\_compliance/institutional\\_review\\_board\\_irb/training/](http://www.ndsu.edu/research/for_researchers/research_integrity_and_compliance/institutional_review_board_irb/training/)

# New Staff Member Tasks and Responsibilities (continued)

## During the First Month (continued)

- State Fleet Policies and Driver Agreement (SFN 61420) – [www.dot.nd.gov/divisions/fleet/statefleet.htm](http://www.dot.nd.gov/divisions/fleet/statefleet.htm)
- Become familiar with Youth for the Quality Care of Animals (YQCA) online at [www.ndsu.edu/4h/member\\_information/programs\\_events/yqca/](http://www.ndsu.edu/4h/member_information/programs_events/yqca/) (YQCA is required for all youth who exhibit at the ND state fair)
- Work with office co-workers and/or state 4-H office to gain access to 4hOnline.

## During Months 2 to 6

- Schedule a campus visit with help from your district director and staff development coordinator. They will suggest things to do or people to connect with, including:
  - Tour of Ag Communication and having professional photo taken
  - Get Bison staff ID card
  - Work with Ag Communication staff on productivity tools
  - Meet with program leader(s) relative to your program area(s)
  - Meet with specialists relative to your program area(s)
  - Meet with 4-H specialists to discuss 4-H programming, which is the responsibility of all staff members
  - 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](http://www.ag.ndsu.edu/ext-employees/branding-and-communications).
- Watch the Communication Planning videos:
  - Communication Planning: Goals (5:50) – <https://youtu.be/3BeF0T2B9Bg>
  - Communication Planning: Target Audience (5:36) – <https://youtu.be/whU0L7F2bpQ>
  - Communication Planning: Key Messages (5:33) – <https://youtu.be/FAzWBadg23Y>
  - Communication Planning: User Scenarios (9:08) – <https://youtu.be/PZMOpCU2Hnl>

## Sometime before Month 12

- Observe and possibly assist at 4-H camp
- Take inventory of the local 4-H program:
  - Visit all 4-H clubs in your county
  - Connect with the 4-H council or organize one if it is not in place
  - Connect with volunteers
  - Study the geographic and demographic representation of youth and adults in your county program

# 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.
- Provide 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 for ordering an Extension uniform/shirt.

## During the First Week of Work

Meet with the new staff member on the person's first day or sometime during the first week of work to:

- Relay information from Ag Comm about new staff member's email and password for Ag Info site
- Complete all final paperwork needed to get employee on board
- Review employee benefits and encourage employee to contact HR if needed
- Complete conflict of interest paperwork if needed
- Review "Who We Are and What We Do" handout/webpage – [www.ag.ndsu.edu/extension/about-us](http://www.ag.ndsu.edu/extension/about-us)
- Review NDSU Extension "For Employees" website ([www.ag.ndsu.edu/ext-employees](http://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](http://www.ag.ndsu.edu/ext-employees/new-employees)) briefly and encourage staff to read through information within each link

- 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
  - Review the mentor/mentee reporting expectations
- Arrange for introductions to a few key agency people and political stakeholders
- Review major policies/procedures
  - NDSU Policy Manual – [www.ndsu.edu/policy](http://www.ndsu.edu/policy)
  - Expense forms, travel regulations and forms, leave policies (advise to seek assistance from district support staff)
- Complete mandatory trainings/forms within established timeframes – [www.ndsu.edu/hr/training/](http://www.ndsu.edu/hr/training/)
- Request 4hOnline access if no co-workers are assigned to do so.

## District Director/Supervisor – continued

### During the First Month of Work

- Suggest resources for demographics or key information:
  - U.S. Department of Agriculture's National Agricultural Statistics Service – [www.nass.usda.gov](http://www.nass.usda.gov)
  - North Dakota Compass – [www.ndcompass.org](http://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](http://www.nd.gov/ndda)
  - Census of Agriculture – [www.agcensus.usda.gov](http://www.agcensus.usda.gov)
- 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.
- Review records retention requirements.
- Review civil rights information.

### 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.
- Identify program planning team to join.
- Encourage staff member to begin entering plans into PEARS.

## Tasks and Responsibilities of New Staff Member's Co-workers

### Before the First Day of Work

- Prepare a computer (clean, assure connection and connectivity).
- Have work space, equipment and keys ready for new staff member.
- Have a phone visit to share information 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.)
- Assist new staff in gaining access to 4hOnline

- Describe:
  - Phone etiquette and voicemail recording – [www.ag.ndsu.edu/ext-employees/new-employees](http://www.ag.ndsu.edu/ext-employees/new-employees)
  - Mail procedures
  - Email etiquette and auto-replies – [www.ag.ndsu.edu/ext-employees/new-employees](http://www.ag.ndsu.edu/ext-employees/new-employees)
  - Office operations such as file management, equipment and supplies, inter-office communication, online calendar system, budget

### During the First Month of Work

- Help identify key contacts the new employee should pursue.
- Discuss how the county operates:
  - Local advisory council
  - How needs assessments have been done
  - Program delivery methods
  - Program evaluation

### During Months 2 to 6

- Share and review the local budget and budget management.

## Tasks and Responsibilities of 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

- Create 4hOnline accounts if needed.
- Provide the *Who to Call* 4-H document and the office brochure.
- 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
  - Upcoming Basic 4-H 101 Training

### 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.
- The 4-H youth development specialist reviews 4-H online.
- The volunteer development specialist shares information on achieving the Extension mission through volunteers online training.
- Each 4-H specialist connects in the first 3 months and shares a checklist that has been developed; send via email (ex: Leigh Ann would send an email on animal science)

# 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.

## 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.
- Discuss professional association(s) to join.
- 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 and/or facilitating a meeting
  - Mentor's visit to mentee's office within two months of new staff member's start date
  - Mentee's visit to mentor's office or educational event (within first three months)
- Review the "suggested framework" on the mentoring webpage ([www.ag.ndsu.edu/ext-employees/new-employees/ndsu-extension-service-staff-mentoring-program-1/county-mentoring-program-information/suggested-framework-for-mentoring-process](http://www.ag.ndsu.edu/ext-employees/new-employees/ndsu-extension-service-staff-mentoring-program-1/county-mentoring-program-information/suggested-framework-for-mentoring-process)).
- 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
- 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.

## 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
  - Discuss New Staff Orientation

### During Months 2 to 6

- Review orientation needs.
- Encourage new staff member to schedule a campus visit, with authorization from district director.
- Set up “Character Traits” training.
- Review needs related to PEARS.

### 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.

## Campus-based New Staff Orientation

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

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