

County Department Head Checklist for Orienting New Colleagues

Date Done	Orientation Action	Notes/Key Points to Emphasize
	BEFORE THE FIRST DAY ON THE JOB	
	Inform office staff of who has been hired; meet to review what needs doing before new colleague begins; delegate tasks, as needed	
	Ensure office space is orderly and equipment is sufficient and in good working order	
	Work with the appropriate offices to get the new colleague set up for e-mail, regular mail, phone service, etc.	District Office automatically sets up e-mail accounts for new hires
	Contact the new colleague and offer to assist with locating temporary housing, making moving arrangements, etc.	
	If applicable, assist in connecting the new colleague with his or her support staff person so the two can begin working on the logistics of getting the new person on board	
	Schedule office staff meeting for the new colleague's first day on the job	
	Write and send news release announcing appointment	
	As needed, contact program area, mentor (if applicable), and District Director to schedule initial orientation visits; make sure designated orientation materials from the Personnel Office are available on the individual's first day	
	Ensure that the exit report, plan of work, etc. of the colleague who previously worked in the position are available and on the new colleague's desk	
	Review the work of the individual previously in the position to identify key local past/present partners, partnerships, collaborators and decision makers so that you can readily orient the new colleague to these key relationships	
	Other:	
	Other:	

Notes:

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Done		
	FIRST DAY ON THE JOB	
	Facilitate a welcome meeting with office staff; assist with tour and introductions to other staff in building, etc.	
	Review office arrangements; make plan for adjustments as needed	
	Provide basic information on the most pressing county/office policies and procedures:	
	office hours, parking	
	security items such as access to building before and after hours; personal security considerations	
	general building information, keys	
	ordering and wearing a name badge	
	ordering and using office supplies and equipment	
	sending and receiving mail	
	using voice mail	
	using e-mail	
	Internet access and use	
	County-based rules and guidelines that impact Extension office operations	
	Plan to spend as much time as needed to answer questions, help new colleague feel welcome, etc.	
	Review contents of New Colleague Information Packet and assist as needed in completing the various new colleague paperwork	Available on line at http://www.uwex.edu/ces/personnel/newstaff.cfm . Some items need immediate attention such as scheduling a benefits counseling session with the Staff Benefits Office (608.262.4857) if such a meeting has not yet occurred.
	Other:	
	Other:	

Notes:

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	FIRST WEEK ON THE JOB	
	Write and send additional news releases, as needed, with photo if possible	
	Create calendar of orientation events/activities and assist with scheduling, e.g., county orientation session (if offered, including employee ID procedures), New Colleague Orientation in Madison, office visits with program area contact, district director, etc.	
	Assist in scheduling one-on-one time with office co-workers (including program assistants) to learn about their responsibilities and relationships to the new colleagues role (30-60 minutes each)	
	Assist in scheduling one-on-one time with key courthouse employees, elected officials and staff, county board members, Extension committee members, community contacts, etc.; schedule any other activities such as tours, informal meetings, etc. that will help the new colleague get more familiar with the county and co-workers	
	Review appropriate procedures for e-mail, regular mail, phone service, etc.	
	Inform the new colleague of relevant internal communications venues, including how and when to participate in upcoming events, e.g., Dean's Teleconference, Program Area Meetings, District Meetings, Office Staff Meetings, County Board and Extension oversight committee meetings; emphasize appropriate protocol	
	Meet with the new colleague to give a brief overview of key aspects of his or her new role with Cooperative Extension and to answer basic questions, i.e., primary purpose and focus of position; UWEX and CES structure; mission and vision; role as Extension educator; role and function of Extension oversight committee; relationships to County Government, County Department Head, District Director, Program Area, Academic Department (if faculty), mentors (if applicable), Professional Associations; Review local programming priorities and accountability	See new colleague information packet/web site and department head resources web site for resources; use position description as a reference; The objective of this kind of orientation is to help new colleagues start to build a foundational understanding; more depth will be provided by others involved in orientation, i.e., program areas, District Director, New Colleague Orientation; this content may require several meetings
	Meet with the new colleague to review the new colleague's preferences in culturally sensitive areas such as religious observances, sharing of personal and family information, etc.	
	Other:	
	Other:	
Notes:		

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Date Done	Orientation Action	Notes/Key Points to Emphasize
	FIRST WEEK ON THE JOB (continued)	
	Provide basic information on county/office policies and procedures; discuss available office resources:	
	agreed-upon ground rules for inter-office communications and other office protocol, especially related to taking vacation, sick leave, professional time scheduling, attending professional development activities, etc.	Refer to "Respectful Workplaces" office ground rules
	use of office space and how to reserve	
	tax-exempt status and use of applicable charge accounts and credit cards	
	office/county recycling guidelines	
	ordering business cards	
	updating office databases and documents with the new employee's name, e.g., web site, mail box, fax form, routing slips, etc.	
	adhering to travel regulations, e.g., expense reports, mileage, meals, insurance considerations	
	policies for being out-of-county	
	ordering and using office supplies and equipment	
	locating and utilizing previous county board and committee reports	
	maintaining files and records; including office shared files, past reports and records, correspondence	
	Provide basic information on available communications technology and how to use them, e.g., DVD, polycom, personal computer, PowerPoint, printed handouts and brochures, fax, calling cards, toll-free phone numbers, etc.	Emphasize polycom etiquette, i.e., introduce self before speaking, use mute button
	Other:	
	Other:	

Notes:

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	FIRST FEW WEEKS ON THE JOB	
	Meet with the new colleague to review relevant organizational information and policies	Refer to the Resources section of the Department Head web site
	Meet with the new colleague to introduce him or her to relevant and useful internal and external web sites	
	Meet with the new colleague to provide an overview of the support units that are available, e.g., Program Development and Evaluation, Media Collection, Distance Learning, CE Technical Services, UWEX Employee Assistance, etc.	Adjust the amount of information according to when the individual will be attending NCO since these areas are covered in more depth at this session
	Continue to assist new colleague in getting acquainted with Extension committee, clientele, news media, key business and agency people, community leaders, coalition members, etc.	
	Provide overview of the program planning and reporting process; review reporting responsibilities to the County committee; introduce civil rights reporting and outreach efforts	Adjust the amount of information according to when the individual will be attending NCO since these areas are covered in more depth at this session
	Provide an overview of the county budgeting process as it impacts the new colleague's work	
	Introduce self-initiated performance review process and professional development protocol	Additional information will be provided by District Director
	Other:	
	Other:	
	FIRST SEVERAL MONTHS ON THE JOB	
	Continue to assist new colleague in getting acquainted with Extension committee, clientele, news media, key business and agency people, community leaders, etc.	
	Assist with arrangements for individualized training and orientation	
	Be available for the new colleague when he or she needs additional information, coaching, clarifications, etc.	
	Maintain contact with DD and program area liaisons regarding how the new colleague is "settling in" to the position and any recommendations for areas where extra support, training or orientation may be helpful	
	Other:	

Other Comments/Planning Notes/Dates to Schedule