

County Department Head Checklist for Orienting New Colleagues

| Date Done | Orientation Action | Notes/Key Points to Emphasize |
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| | BEFORE THE FIRST DAY ON THE JOB | |
| | Inform office staff of who has been hired; meet with staff 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 suggestions for how to find housing, school and community information, 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 to facilitate process of integrating new colleague | |
| | Write and send news release announcing appointment | |
| | As needed, contact program area, mentor (if applicable), and District Director to schedule initial orientation visits; download orientation materials from the New Colleague web site and make them available on the individual's first day | http://www.uwex.edu/ces/nco/resources.cfm |
| | 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, or someone you've asked to assist, can readily orient the new colleague to these key relationships | |
| | Other: | |

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| | 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 | Contact CE Tech Services for assistance. |
| | 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 New Colleague Information and assist as needed in completing the various new colleague paperwork; assist the colleague in posting background introductory information on the New Colleague website; notify Mary Detra so she can invite colleague to new colleague orientation Wisline and Madison Workshop | Available on line at http://www.uwex.edu/ces/nco/resources.cfm . Some items need immediate attention such as completing I-9 and W-4 forms and scheduling a benefits counseling session with the Staff Benefits Office (608.262.4857) if such a meeting has not yet occurred. |
| | Other: | |

| Date | | |
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| Done | Orientation Action | Notes/Key Points to Emphasize |
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| | FIRST WEEK ON THE JOB | |
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| | 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), Orientation Wisline Webs, 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 | |
| | 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 protocol and procedures for using e-mail, regular mail, phone service, Wislines, etc. | |
| | Inform the new colleague of relevant internal communications venues, including how and when to participate in events, e.g., Dean's Wisline, 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 depending on the colleague's level of familiarity with Extension. |

| Date | | |
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| Done | Orientation Action | Notes/Key Points to Emphasize |
| | FIRST WEEK ON THE JOB (continued) | |
| | Meet with the new colleague to review his or her preferences in culturally sensitive areas such as religious observances, sharing of personal and family information, etc. and how to share this info with office | |
| | 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. | |
| | 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., location of DVD, polycom, office handouts and brochures, fax, calling cards, toll-free phone numbers, etc. | Emphasize polycom etiquette, i.e., introduce self before speaking, use mute button |
| | Other: | |

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| | FIRST FEW WEEKS ON THE JOB | |
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| | Meet with the new colleague to review relevant organizational information and policies | Refer to the "Administration" section of the Resources for Extension Colleagues 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 | Info available at HR Reference Information and Resources |
| | Introduce principles of responsibility-based culture; | DiSC and Team Profiles are taken as part of NCO |
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| | Other: | |
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| | FIRST SEVERAL MONTHS ON THE JOB | |
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| | 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 | |