



# ORIENTATION CHECKLIST

FOR USE  
WITH NEW STAFF

**Also available as a PDF file at:**

**<http://www.cas.psu.edu/docs/casadmin/NSO/NSOMain.html>**

**PENNSSTATE**



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College of Agricultural Sciences • Cooperative Extension



Dear CED:

This Orientation Checklist is written for you to use in the orientation of your new staff member. It is divided into major sections based on the length of time the new staff member has been on the job. The orientation topics which are covered at New Staff Orientation (NSO) and on the NSO web site (<http://www.cas.psu.edu/SDUpdates.html>) are indicated. Additionally, some of the orientation of new staff members is the responsibility of the regional staff. These topics are listed as a separate section. The regional responsibilities are included in the same checklist so that you know what the regional staff will be discussing with your new staff member.

There is space at the end of each section for you to indicate the new staff member's progress to date. Please note both strengths and areas requiring further development. Both you and the new staff member should sign and date each section upon completion.

Shortly after your new staff member is on the job, a letter will be sent from the Staff Development office indicating the dates and location of the next New Staff Orientation.

We hope this is a useful tool to help you with the orientation process. Please contact either your RD or me if you have questions about orientation.

Sincerely,

Bill Devlin, Director  
Human Resource Services

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**For use in the orientation of . . .**

**New Staff Member:**

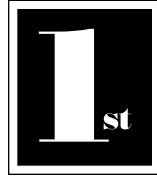
**Date of Hire:**

\_\_\_\_\_

(name)

\_\_\_\_\_

To Be Completed/Discussed During the New Staff Member's:



W E E K  
ON THE JOB

CED RESPONSIBILITY



**Provide information and assistance relating to conditions of employment and employee benefits.** *(Please check when completed.)*

- Extension Agent's Handbook (C Web)
- Penn State Policy Manual (NSO Web)
- Paid time off (NSO Web)
- Educational benefit options (NSO Web)



**Confirm new staff member's attendance at regularly scheduled monthly benefits sessions or consultation with the Human Resource's Office.** *(Please check when completed.)*


- Health benefits
- Retirement plan
- Annuity programs
- Insurances



**Provide information so that new staff member gains an understanding of office procedures, facilities, and resources.** *(Please check when completed.)*


- Interoffice communications (office manager, routing mail, keeping office informed about schedules, weekly itineraries, e-mail)
- Secretarial responsibilities (typing, priorities, filing, newsletters, etc.)
- Purchasing procedures
- Office computer contact
- Travel regulations (county, PSU, travel directory) and expense account filing
- Informal county travel policy (double/single, Penn State rates, etc.)

- Penalty mail requirements (**NSO Web**)
  - Reinforce need to keep mailing lists updated and purged annually
  - Review what can be sent via penalty mail—Cooperative Extension business only
  - Review Chapter IX, Extension Administrative Handbook—outlines policies and procedures relevant to use of extension official mail privilege
  - Review confidentiality of mailing lists
- Mailing lists information/ mailing budget
- County budget
- Publications distribution
- Files in the office
- Office management expectations (maintenance and purchasing)
- Types and functions of office equipment (printing, phone procedures, computers, satellite, audiovisual)
- Status of support staff (county-paid, hours, union, etc.)
- Introductions to key personnel at office site (e.g., building maintenance staff, department heads, staff in adjacent offices)
- Liability insurance/contracts (**NSO Web**)
- Public relations efforts—radio, TV programs, etc.
- Office details (sunshine fund, coffee, lunch, vending, hours, etc.)

 **Discuss programs or activities already planned to determine those in which new staff member should participate.** *(Please check when completed.)*

- Share county time-line or calendar

## REGIONAL RESPONSIBILITY

 **Provide information and assistance relating to conditions of employment and employee benefits.** *(Please check when completed.)*

- Contact new staff member to welcome him/her to the region

 **Arrange for participation in mentoring program.**

- Please check when completed

Follow-Up with CED

1. Consult with CED to review what was covered with new staff member regarding conditions of employment and employee benefits and provide follow-up where needed.

**CED Comments Regarding Staff Member's Progress to Date:**

**Section 1, *1st Week on the Job*, was successfully completed.**

\_\_\_\_\_  
**County Extension Director**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**New Staff Member**

\_\_\_\_\_  
**Date**

To Be Completed/Discussed During the New Staff Member's:

**F I R S T**



**M O N T H S**  
**O N T H E J O B**

**C E D R E S P O N S I B I L I T Y**



**Provide information about the organization of the college and extension.**

*(Please check when completed.)*

- Review the philosophy and mission of Penn State, the College of Agricultural Sciences, and Cooperative Extension (**NSO Web**)
- Review key values of organization
- Review administrative structure and responsibilities of key positions (**NSO**)
- Review services provided in the College (**NSO Web**)
  - Ag. Information Services
  - Human Resources
  - Computer Services
  - Administrative Services
  - Other (list)
- Provide a copy and review the current State Plan of Work (POW) and county plans of work
- Review video of satellite conference on use of the “4-H Name and Emblem”



**Familiarize new staff member with resources in the county office.**

*(Please check when completed.)*

- Listing of AV materials and publications (state and/or regional)
- Faculty and staff directories
- Handbooks (as appropriate)
  - 4-H/Youth Development Reference and Resource Manual
  - EFNEP Policy and Procedures Manual
  - Disaster Manual
  - Volunteer Screening Manual

- National Zip Code Directory
- 800 Telephone Directory
- Officers of Pennsylvania Agricultural Organizations

Satellite dish operation and use manual

 **Review available resources from the university with new staff member.**

*(Please check when completed.)*

- Review procedure for specialist support
- College newsletters (hard copy and electronic)
- Discuss telecommunications options and how to access (PENpages, Internet, Lias, WWW)

 **Review new staff member's position announcement to help her/him gain an understanding of major roles and responsibilities. Hold an introductory discussion about developing Action Plans.**

- Review statewide Plan of Work and Annual Action Updates
- Review web-based planning and reporting system

 **Discuss first year performance expectations and Staff Review and Development Plan.**

- Please check when completed

 **Provide overview of roles/responsibilities of county extension program staff. Discuss office procedures and organizational structure.** *(Please check when completed.)*

- Participate in office meetings and staff conferences (immediate)
- Plan a team building session for incorporation of new staff into county team
- Discuss required county office reporting (LRT, AA Desk Audits, A-100s, program reports, County Annual Reports) procedures and deadlines

 **Assist new staff member in establishing and maintaining working relationships with county groups that support and enhance extension programming.**


*(Please check when completed.)*

- Discuss with new staff the structure of county and regional extension committees, including election, membership, geographic representation, and length of service and share planned meeting dates (i.e., County Extension Board; program development committees; PCCEA)
- Discuss staff member's role in legislative activities at county, regional, and state levels

 **Review with new staff member the extension programming process in developing county, multi-county, and regional extension education programs.**

*(Please check when completed.)*

- Overview of the Program Development Schema (NSO)
- How to Write and Assess Program Objectives (NSO)
- Overview of extension's Educational Program Development Model (NSO)


 **Discuss the college's Affirmative Action Plan and relevant implementation with new staff member (NSO).** *(Please check when completed.)*

- Review Extension Affirmative Action Plan (Blue Book)
- Provide a conceptual overview of Penn State's commitment to AA and EEO
- Review County Civil Rights Assessment materials and County Plan of Action
- Have new staff member establish a "Personal Affirmative Action File" and review contents that are appropriate to include in the annual desk audit

 **Review and share county demographic information with new staff member.**

*(Please check when completed.)*

- Uniqueness of county situation
- Issues about which programs should be developed
- Share census information and Minority Population Maps

 **Help new staff member locate the web-based NSO Learning Modules (<http://www.cas.psu.edu/docs/casadmin/NSO/NSOMain.html>). New staff member should review the information found in the New Staff Orientation web site and indicate that he/she reviewed and understands the information. New staff member should place an X on the line after he/she reviews the information listed below.**

\_\_\_\_\_ **Working for Penn State**

- Organizational Chart of the College of Agricultural Sciences
- Cooperative Extension Regional Structure
- Workforce Profile for Cooperative Extension
- Employment Policies
  - Staff Exempt Employment at Penn State (HR34)
  - Penn State Policies—SPEC (Guru)
  - Conditions of Employment Specific to Extension Agents  
*provisional period, promotion, vacation, sick leave, holidays, sabbatical leaves, other policies, conflict of interest*
  - HR78—Staff Failure to Meet Acceptable Standards
  - HR79—Staff Grievance

- Benefits, Privileges, and Services Available to County-Paid Staff (for county paid staff only)
- Cooperative Extension Funding Sources

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### **History of Cooperative Extension**

- Brief Historical Perspective of Cooperative Extension
- USDA Web Site
- NASULGC Web Site

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### **College of Agricultural Sciences Academic Departments**

- I reviewed the web sites of at least two departments whose faculty areas of expertise relate to my major programming responsibilities.

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### **College of Agricultural Sciences Administrative and Service Units**

- I reviewed the web site for Computer Services
- I reviewed the web site for Business and Finance
  - Penalty Mail Guidelines
  - Travel Guidelines
- I reviewed the web site for Conferences and Short Courses
- I reviewed the web site for Ag. Information Services

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### **Extension Agent's Employee Handbook**

- Extension Programs/AA Diversity
- Employment Policies
- Policies and Procedures
- Staff Benefits
- Leave-of-Absence Policies
- Staff Development
- Professional Organization Memberships
- University Service Awards/Credit Union

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### **Time Management**

- Time Management Quiz
- Time Management Tips
- “To Do” Form
- Charting a Successful Major Event
- Time Wasters
- The “Stacked-Desk” Syndrome
- Additional Resources

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### **Planning Successful Meetings**

- Meeting Planning
- Meeting Arrangements
- Meeting Set-Up
- Meeting Control
- Meeting Aftermath

\_\_\_\_\_ **Liability Issues in Extension**

- Extension Volunteer Liability Insurance
- Employee Liability
- Contracts
- Reporting Potential Claims Issues
- Sale of Food and Beverages at University Locations
- Approved NON-PSU Caterers
- Introduction to the Pennsylvania 4-H/Youth Development Policy and Resource Manual

\_\_\_\_\_ **Creative Marketing**

- Introduction
- Foundations of a Successful Marketing Program
- Creating a Positive Image
- Office Image Checklist
- Image Analysis Survey
- Relationship Marketing Model
- Creative External Marketing: Putting Relationships to Work
- Targeting Your Efforts
- Benefits and Drawbacks of Selected Media Choices

\_\_\_\_\_ **Sexual Harassment**

\_\_\_\_\_ **Affirmative Action**

## REGIONAL RESPONSIBILITY



**Provide information so that new staff member gains an understanding of regional office procedures, facilities, and resources.** *(Please check when completed.)*


- Schedule new staff visit to regional office to meet regional staff and review responsibilities
- Map of the region outlining staff and program outreach coverage
- List of audiovisuals and equipment lending procedures from regional office
- Review types of mailings that should be sent to the regional office and what should be sent to the regional directors' office at University Park
- Develop personal file for affirmative action documentation
- Review information on copyright materials including the use of disclaimers



**Review new staff member's position announcement to help him/her gain an understanding of major roles and responsibilities.** *(Please check when completed.)*

- Assist new staff in identifying computer training skills—encourage new staff to attend based on skill level

- Identify computer training videos available on loan through Computer Services for new staff member's use
- Assist new staff member in basic time management skills: **(NSO Web)**
  - Allow time to prepare for programs
  - Balance work and family
  - Keep control over one's own schedule
  - Allow for professional development enhancement
  - Don't over-schedule

 **Review with new staff member, the extension programming process in developing county, multi-county, and regional extension education programs.**  
*(Please check when completed.)*

- Assist new staff in selecting objectives for inclusion in their Action Plans (APs).
  - Review the current State Plan of Work (POW)
  - Provide samples of "exemplary" staff AP for review
  - Provide any follow-up as needed with new staff member after their return from NSO
- Follow-up and provide individual assistance as needed on developing Action Plans
- Review the web-based planning and reporting system

 **Review promotion and review system.**

- Please check when completed

Follow-Up with CED

1. Assist the CED in identifying agents (county, regional, multi-county) with relevant/similar programming responsibilities for new staff to contact.
2. Assist the CED in identifying at least two "exemplary" program or advisory committees in surrounding counties for the new staff member to observe.
3. Reinforce CED discussion regarding first year performance expectations and Staff Review and Development Plan.

**CED Comments Regarding Staff Member's Progress to Date:**

**Section 2, *First 0 to 3 Months on the Job*, was successfully completed.**

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**County Extension Director** **Date**

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**New Staff Member** **Date**

To Be Completed/Discussed During the New Staff Member's:

**F I R S T**



**M O N T H S  
O N T H E J O B**

**CEDED RESPONSIBILITY**



**Help the new staff member establish and maintain good working relationships with other extension staff in the county office.** *(Please check when completed.)*

- Recommend that the new staff member schedule time with each co-worker to become familiar with their programs, areas of expertise, etc.
- Provide copies of all current staff APs for new staff member to review
- Identify location of most recent copies of Annual Accomplishment Reports, County and Regional Strategic Plan, etc.



**Help the new staff member establish and maintain a working relationship with multi-county, regional, and University Park-based personnel.**

*(Please check when completed.)*

- In consultation with other staff, identify agents (county, regional, multi-county) with relevant/similar programming responsibilities for new staff to contact
- Recommend new staff observe a program or advisory committee of at least two agents identified above



**Help new staff member establish and maintain working relationships with county groups related to extension education programming.**

*(Please check when completed.)*

- List committee chairpersons and other key leaders who are involved in extension programming process for follow-up contact by new staff member




**Review purpose/function and identify leadership of the Pennsylvania Council of Cooperative Extension Association (PCCEA) at the regional and state levels.**

- Please check when completed

 **Assist new staff member in developing and maintaining working relationships in the community.** *(Please check when completed.)*

- Identify key external groups, agencies, and organizations—propose visits for the new staff member as appropriate
- As CED, introduce or designate a staff member to introduce new staff to the County Commissioners and other key legitimizers in the county/community

 **CED or designee identify important constituent groups for the new staff member and facilitate introductions.** *(Please check when completed.)*


<u>Title</u>	<u>Name</u>
<input type="checkbox"/> Soil Conservation District Conservationist	_____
<input type="checkbox"/> Ag. Preservation Specialist	_____
<input type="checkbox"/> Farmers Home Administration Supervisor	_____
<input type="checkbox"/> Production Credit Association County Supervisor	_____
<input type="checkbox"/> Farm Organization Heads	_____
<input type="checkbox"/> Dairy Herd Improvement Supervisor	_____
<input type="checkbox"/> School Superintendent(s) or School Enrichment Teachers	_____
<input type="checkbox"/> Juvenile Court Representative	_____
<input type="checkbox"/> Regional Planning Committee Representative	_____
<input type="checkbox"/> Children and Youth Services Representative	_____
<input type="checkbox"/> Grass Roots Minority Organizations	_____
<input type="checkbox"/> County Council of Human Service Agencies	_____
<input type="checkbox"/> County/District Intermediate Unit	_____
<input type="checkbox"/> Representative of “WIC” and Healthy Mothers/Healthy Babies Coalition	_____
<input type="checkbox"/> County Public Housing Authority	_____
<input type="checkbox"/> Council of Churches	_____
<input type="checkbox"/> Key Health Care Representatives (hospital or agency)	_____

Chamber of Commerce \_\_\_\_\_


Local Coalition Chairs (i.e., environment,  
maternal health, nutrition) \_\_\_\_\_

 **Review the Program Development Process using the Program Development Model.** *(Please check when completed.)*

- Review adult learning theory (NSO)
- Discuss how advisory committees are formed and used in the program development process (NSO)
- Share examples of successful educational programs and explain the process (NSO)
- Review techniques for marketing programs and share success stories (NSO Web)
- Review draft of Action Plan

 **In assisting individuals, observe new staff member's ability to (as applicable):** *(Please check when completed.)*

- Conduct an educational program
- Work with and interact positively with other extension staff in unit
- Collect, develop, and maintain teaching materials and resources
- Work with agencies and/or program committees
- Comply to Affirmative Action requirements
- Respond appropriately to telephone calls and requests
- Respond appropriately to requests received in mail
- Assist office callers
- Assist a 4-H club or youth group
- Make an individual home or farm visit

 **Conduct mid-probation assessment of new staff member's ability to plan and conduct extension education programs and be a part of county extension team. Forward assessment to RD.**

- Please check when completed

## REGIONAL RESPONSIBILITY

### **Assist new staff member in establishing and maintaining working relationships with county groups related to extension programming.** *(Please check when completed.)*

- Provide an overview of regional and state PCCEA—responsibilities and function
- Assist staff in knowing where to find needs assessment information and review:
  - Regional economic developments and trends
  - Census data from region
  - Other

### **Review the Program Development Process using the Program Development Model.** *(Please check when completed.)*

- Review adult learning theory (NSO)
  - Provide any follow-up needed by new staff member following NSO
- Discuss how advisory committees are formed and used in the program development process (NSO)
  - Share FCL training materials with new staff member
- Discuss group dynamics and team building activities
  - Share resources on conflict management/resolution
- Share examples of successful educational programs and explain the process (NSO)
- Review techniques for marketing programs and share success stories
  - Provide follow-up with new staff member (i.e. Power Point training, Ext. Ed. Communication Course, materials on developing overheads, etc.)

#### Follow-Up with CED

1. Work with CED to prepare him/her to conduct mid-probation assessment of new staff member.

**CED Comments Regarding Staff Member's Progress to Date:**

**Section 3, *First 4 to 6 Months on the Job*, was successfully completed.**

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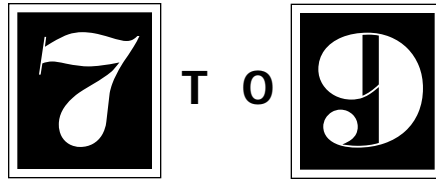
**County Extension Director** **Date**

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**New Staff Member** **Date**

To Be Completed/Discussed During the New Staff Member's:

**F I R S T**



**M O N T H S  
O N T H E J O B**

**C E D R E S P O N S I B I L I T Y**



**Discuss new staff member's responsibilities related to multi-disciplinary programming:** *(Please check when completed.)*

- With county co-workers
- In multi-county area
- In region



**Assess ability, through observation, to plan and conduct extension education programs in workshops or other group situations:** *(Please check when completed.)*

- Prepare a written plan/outline for each topic to be taught
- Locate and arrange for use of resources and facilities in the community
- Motivate participants to meet their needs for learning
- Use appropriate technologies, methods, procedures and techniques in delivering educational programs. For example:
  - Prepare and use appropriate audiovisual aids
  - Conduct group discussions
  - Plan and arrange for use of resource persons
  - Introduce resource persons in appropriate fashion
  - Maintain proper physical environment of heating, lighting, and ventilation
  - Provide for individual learning experiences
- "Marketing" the extension education program: **(NSO Web):**
  - Speak before community groups
  - Prepare an exhibit or display promoting an "issue-oriented" program or extension in general
  - Participate in community awareness days (fairs or other events) to promote the program when appropriate

- Planning and conducting educational programs using a variety of media (as appropriate)
  - Prepare newspaper feature articles on subject matter topics
  - Prepare regular column
  - Develop programs for TV and/or radio
  - Participate in the writing and distribution of county, regional, or multi-county newsletters

 **Discuss appropriate time management techniques and balancing work/family (NSO Web).**

- Please check when completed

 **Discuss working with program advisory committees.**

- Please check when completed

## REGIONAL RESPONSIBILITY

 **Observe new staff member conducting an educational program.**

- Please check when completed

 **Attend at least one program advisory committee.**

- Please check when completed

### Follow-Up with CED

1. Follow-up with CED and new staff member to check on progress made in staff member's responsibilities related to multi-disciplinary programming.
  - Assist with problem solving where and when needed as identified by the new staff member or CED.

**CED Comments Regarding Staff Member's Progress to Date:**

**Section 4, *First 7 to 9 Months on the Job*, was successfully completed.**


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**County Extension Director** **Date**

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**New Staff Member** **Date**


To Be Completed/Discussed During the New Staff Member's:

**F I R S T**  
  
MONTHS                  YEAR  
ON THE JOB

CED RESPONSIBILITY

 **Review appropriate evaluation methodologies with new staff member.** *(Please check when completed.)*

- Discuss different evaluation strategies (NSO)
- Discuss how to select a data collection instrument (NSO)
- Discuss how to select and create an evaluation tool (NSO)
- Discuss how to analyze results and make recommendations based on a program evaluation (NSO)

 **To help new staff member develop as a professional extension educator, review professional development opportunities available. Opportunities to be reviewed might include, but are not limited to:** *(Please check when completed.)*

- In-Service
- Satellite in-Service
- Professional associations (Discuss county/college support for attendance, i.e., time and money)
- Graduate programs
- Seminars (local/national)
- Certification programs (i.e., Certified Financial Planner, etc.)
- Personal development activities (i.e., Toastmasters, Dale Carnegie, etc.)

 **Assist new staff in identifying external funding sources.** *(Please check when completed.)*

- Review the management of soft monies/grants/contracts
  - When to process funds through the county or the University
  - Project management at the county level
  - Project accountability and reporting of funds

 **Prior to one year anniversary, conduct final assessment utilizing Staff Review and Development Plan of new staff member's ability to plan and conduct extension education programs and be part of the county extension team.**

*(Please check when completed.)*

- Review year one Impact and Accomplishment Report and make decision on recommending staff member for regular employment status or termination from provisional status
- Forward assessment to RD

## REGIONAL RESPONSIBILITY

 **Review appropriate evaluation methodologies with new staff member.**

*(Please check when completed.)*

- Discuss different evaluation strategies (NSO)
  - Provide any follow-up needed following NSO participation by new staff member
  - Assist new staff member in identifying ways program advisory committees can assist in evaluating educational program outreach
- Discuss how to select a data collection instrument (NSO)
- Discuss how to select and create an evaluation tool (NSO)
  - Work with new staff member on identifying at least two major programs to evaluate in their APs
- Discuss how to analyze results and make recommendations based on a program evaluation (NSO)

 **Continue to provide a support system for the new staff member in the region.**

*(Please check when completed.)*

- Provide an opportunity (group meeting) for new staff and their mentors to meet. Mentors and new staff interact with one another to assist in problem solving, program enhancement, working with advisory committees, etc.

Follow-Up with CED

1. Work in concert with the CED in helping new staff identify external funding sources.

**CED Comments Regarding Staff Member's Progress to Date:**

**This is to indicate that** \_\_\_\_\_  
(new staff member)

**has completed all sections of the Orientation Checklist.**

\_\_\_\_\_  
**County Extension Director** **Date**

\_\_\_\_\_  
**New Staff Member** **Date**

**Please retain the Orientation Checklist in county personnel files.**

**This publication is available in alternative media on request.**

The Pennsylvania State University is committed to the policy that all persons shall have equal access to programs, facilities, admission, and employment without regard to personal characteristics not related to ability, performance, or qualifications as determined by University policy or by state or federal authorities. The Pennsylvania State University does not discriminate against any person because of age, ancestry, color, disability or handicap, national origin, race, religious creed, sex, sexual orientation, or veteran status. Direct all inquiries regarding the nondiscrimination policy to the Affirmative Action Director, The Pennsylvania State University, 201 Willard Building, University Park, PA 16802-2801: Tel. (814) 865-4700/V, (814) 863-1150/TTY.

**Revised 4/00**