New Agent Onboarding Checklist for Local Units

The following checklist is designed to be used by the local unit director and board chair as they determine who among local unit colleagues (other agents, program assistants, and office professionals), along with board and program development committee members, is responsible for each task in orienting the new agent. Modify this checklist to fit the unique needs and situation of the new agent and local unit.

Within one week after acceptance of position…

(If new agent will be moving from a different location)

1. ___ Provide Information about realtors, utilities, banks, schools, day care and other community services.
2. ___ Send information from Chamber of Commerce or other relevant community welcome information.

Before new agent begins working…

3. ___ Develop a plan for announcing the new agent's arrival: news releases, social media, newsletters. Extension Operations will provide a brief news release.
4. ___ Prepare agent's office for his or her arrival. Clean office, replenish supplies, update furniture, update technology.
5. ___ Check with IT support to make sure technology is ready for new agent to log in appropriately.
6. ___ Review *New Agent Professional Development* module on the Board Leadership website with local board.
7. ___ Let agent know when office opens, where to park, and any other information that would be helpful before first day of work.
8. ___ Compile useful information: office policies, action plans, calendar of events, K-State Research and Extension Directory, and other resources.
9. ___ Review the *Local Unit Discovery Tool* and be prepared to answer questions for new agent.
10. ___ Order nameplate for agent's desk.
11. ___ Order office credit card for agent's use.
12. ___ Develop a plan for welcoming the new agent, including a reception or similar event.

First day in the office…

13. ___ Host a morning break or lunch to welcome the new agent.
14. ___ Introduce new agent to coworkers and staff in nearby offices or businesses.
15. ___ Give new agent a key to office.
16. ___ Tour office, including workspaces, meeting rooms, work rooms, restrooms, vending machines, storage, and other important work areas.
17. ___ Review computer access and help new agent get logged into local and K-State network; email account and password will already have been set up by K-State.
18. ___ Have new agent set up voice mail and email signature block.
19. ___ Schedule time to review items from this list and the Local Unit Discovery Tool.
20. ___ Review office emergency procedures.
21. ___ Get agent's emergency contact numbers and ask them to fill out Voluntary Adult Health Form. Place this form in a sealed envelope and file with forms from other office personnel.

22. ___ Get agent's signature for use in pre-printed forms, documents, and electronic signatures.

Within first week…

23. ___ Host a community welcome event for the new agent.
24. ___ Review the Local Unit Discovery Tool with the new agent.
25. ___ Work with new agent to block time on their calendar for new agent onboarding coursework.
26. ___ Arrange for new agent to interview with local media.
27. ___ Review calendar of upcoming events and the new agent's responsibilities for each event.
28. ___ Provide job description for new agent.
29. ___ Introduce new agent to key individuals (including county commissioners) in other offices in the courthouse, office complex or nearby businesses.
30. ___ Facilitate informal meetings for new agent with board members and key volunteers.
31. ___ Review process for reporting work-related injuries in KSU's online reporting portal.

Within first month…

32. ___ Facilitate contact with PDC chair(s) to set a date and agenda for first meeting, which should focus on getting acquainted.
33. ___ Assist new agent in identifying key community collaborators with whom to meet and interview to get to know the community.

34. ___ Review previous years' educational program action plans and reports.
35. ___ Meet with other agents, office professionals, and program assistants to learn about their responsibilities.
36. ___ Give tour of county or district. Encourage board and PDC members to do this task.
37. ___ Check in with new agent to make sure they are receiving information from appropriate listservs.

As appropriate…

38. ___ Review local unit's responsibilities and initiatives to ensure access to educational programming by all county or district residents.
39. ___ Review procedure for processing local program discrimination complaints.
40. ___ Review local budget, including grants, fee-for-service initiatives, and other local unit funding sources.
41. ___ Review agent's role in programming unique to his or her subject matter responsibilities.
42. ___ Prepare new agent for major events, such as K-State Research and Extension Annual Conference, providing an overview of what to expect.

Local Unit Director or Regional Director Responsibilities

In all districts and in counties with four or more agents, the local unit director will cover the following topics during the agent's first year of employment. In a county with fewer than four agents, the regional director will cover these topics or assign another staff member to the responsibility.

1. Representing K-State Research and Extension as a professional.
2. Professional scheduling
3. Working with the executive board and program development committees
4. Working with office professionals, program assistants and other agents
5. Program Focus Teams
6. Program impact reporting
7. Performance review
8. Professional development plan
9. Agent employment agreement (salary, benefits, Annual Conference, etc.)
10. Local policies and procedures
11. Local collaborative relationships with other organizations
12. Conflict resolution

Role of the KSRE Coaching Team

The K-State Research and Extension Coaching Team is responsible for advising, coaching, and facilitating the mentoring of new agents during their first year of employment. A member of the coaching team will make personal contact with the new agent within their first two weeks of employment. Coaches will interact with and support new agents in a variety of ways including one-on-one visits, Microsoft Teams chats, monthly new agent Zoom sessions and other group meetings. Coaches will also help new agents network with other agents and professionals in the organization who can provide additional support.

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