**Directions**

Onboarding serves as a bridge between the promise of a new hire and the fulfillment of their potential. It integrates new employees into the organization, prepares them to succeed at their jobs, and supports them in becoming fully engaged members of the MU Extension and Engagement team.

This checklist is designed to assist supervisors with the onboarding of new employees. It is organized chronologically with suggestions on creating and implementing a customized onboarding experience for new employees. ***It is the responsibility of each supervisor to develop an onboarding plan and schedule for each new hire.*** Supervisors may want to identify additional mentors who will serve as guides through the process. In this case, supervisors and/or assigned mentors may consider working in partnership to build a strategic and robust plan.

The onboarding plan and schedule should be customized to fit the needs of the new hire, relative to the needs of the position. ***Not all items on this list need to be addressed.*** Conversely, supervisors and/or mentors may want to add additional activities that are relevant to the new employee’s position. As a supervisor, be intentional and thoughtful about how you bring your new employees onboard by creating a customized plan and schedule. This checklist offers many suggestions, resources and tools to help you create a robust onboarding process for new employees.

* Use MU Extension and Engagement’s *Onboarding Checklist* and *Competency-Based Individual Development Plan* *(IDP)* as the foundation for your planning.
* Review and incorporate UM system Onboarding Series into your plans: <https://www.umsystem.edu/ums/hr/tmr/virtual_onboarding>
* MU Extension New Employee Orientation occurs two times a year in April and October. Ensure new hires attend this session as soon as possible.
* Customize your plan to fit the needs of the organization and team and the needs of the new hire. Ensure the plan addresses the 4 C’s of onboarding: Compliance, Clarification, Culture, and Connection.
* Assign primary and secondary mentor(s). Supervisors and mentors should collaborate to develop a structured mentoring experience for new hires. Identify goals of the mentor/mentee relationship and specific learning objectives new hires need to achieve through the mentoring process.
* Include specific action steps new hires will take to implement their onboarding plan.
* Schedule frequent meetings with the new employee, their supervisors and/or mentors to discuss their progress, what they have learned, areas of improvement, and offer feedback, advice and redirection when needed. Consider the following questions as you begin to meet with new hires to discuss their progress against their onboarding plan:
	+ What have you learned so far?
	+ How might you apply what you learned to your performance expectations?
	+ What successes have you had?
	+ Who have you met with? What did you learn from them?
	+ What further connections might be useful?
	+ Where might you still struggle?
	+ What further questions do you have?
	+ What clarification, resources, or support can I offer?

**Prior to Start Date**

Outcomes: Supervisors develop a customized onboarding plan and schedule to welcome and integrate new employees into their jobs. The onboarding plan should account for the first six months to a year of employment.

* As soon as Form 54 (Personnel Action Form) is finalized and a criminal background check is completed, UM System Human Resources will send an automated email to each new hire. This email will provide the new employee with their Employee Identification Number (EIN), username login credentials, instructions for creating their password, and information on completing required new hire forms.
* The employee will receive an email from Extension HR with instructions on completing HR paperwork.
* For Field Faculty, Regional Director should email Extension Technology and Computer Services (ETCS) at etcs@missouri.edu and order necessary technology hardware and software, and arrange for access to necessary teams’ drives and administrative systems like PeopleSoft, myExtension, myHR, etc.
* For Field Faculty, Regional Director should contact employee’s building coordinator to order office or work area keys.
* Regional Directors should order business cards: <http://ps.missouri.edu/onlineProducts/stationery/stationeryMUExtension/>
* Regional Directors should order MU Extension name tag: <https://muextensionway.missouri.edu/support-units/human-resources/nametags>
* Regional Directors should arrange for phone installation.
* If applicable, instruct new employee to create a parking account with Parking and Transportation Services: <http://parking.missouri.edu>
* Regional Directors need to ensure new employee workspace/office is clean and stocked with necessary office supplies.
* If applicable, Program Supervisor should order any needed apparel or logo items.
* Identify mentor(s) for new hire. Consider using several mentors. Program area mentors can offer assistance with program specific subject matter expertise. Regional mentors can provide assistance to new hires with regional issues and introductions to local partners and community groups. Process mentors can aid new hires in understanding internal administrative workflows. Consider using Extension Council members as mentors or others based on the unique needs of the new employee. Education Directors and Regional Directors should work together to identify appropriate mentors.
* For Field Faculty, Regional Directors should call new employee before their first day:
	+ Warmly welcome them to MU Extension and Engagement.
	+ Confirm start date, work times, place, parking, dress code, etc.
	+ Relay information about meeting with MU HR to complete all necessary paperwork and remind them to bring proper identification to complete I-9 form.
	+ If eligible, instruct new employee to enroll in benefit programs by logging into myHR (<http://myhr.umsystem.edu>) Note: new employees only have 31 days from their date of hire or date of eligibility to enroll in benefits.
	+ Answer any questions they may have.

**Prior to Start Date (Con’t)**

* For Field Faculty, Regional Directors should create a *Welcome Packet* and onboarding schedule. Include the following:
	+ Welcome letter (under “On or before the first day of employment” dropdown): <https://muextensionway.missouri.edu/support-units/human-resources/processing-new-employees>
	+ Job description.
	+ MU Extension and Engagement’s mission, vision, and value statements:
	+ <https://extension.missouri.edu/about-us/mission-vision-and-values>
	+ MU Extension and Engagement organizational chart: <https://extension.missouri.edu/media/wysiwyg/Extensiondata/ExtensionWay/Docs/MUExtensionOrgChart.pdf>
	+ Information regarding MU Extension Equity, Diversity, and inclusion Council (EDIC): <https://muextensionway.missouri.edu/inclusive/>
	+ Program specific mission, vision, and organizational chart.
	+ Map of Extension regions in the State <https://extension.missouri.edu/media/wysiwyg/Extensiondata/ExtensionWay/Docs/noc-MapMoRegionsOverview.pdf>
	+ List of core competencies and *Individual Development Plan* (IDP).
	+ Include a list of mentors and/or important first day/week contacts.
	+ Contact information for key team members or other important numbers, email addresses, etc.
	+ Information on Professional Extension Associations: <https://muextensionway.missouri.edu/support-units/professional-associations>
	+ Acronym Guide: <https://muextensionway.missouri.edu/network-of-councils/council-training/acronyms-guide>
	+ List of current local council members.
	+ Regional staff directory.
	+ List of commonly used websites (MU Extension Way, Extension home page, etc.)
	+ Schedule of activities, tours, trainings, and introductory meetings with Regional Directors, Education Directors, Council Members, County Commissioners, mentors, teammates, or other critical constituents for the first 6 – 9 months.
	+ Regional Directors should work collaboratively with the new employee’s Education Director to include any program specific items for the *Welcome Packet*.
* Plan introduction of new employee to existing team:
	+ Email department area and/or regional team members to introduce the new hire. Include start date, employee’s role on the team, and bio.
	+ Arrange for a department celebration to welcome new employee.
	+ Arrange for lunch with new employee to meet with supervisors, mentors, or other key constituents during the first week of employment.
	+ Arrange for county or campus tours.

**First Day**

Outcomes: New employee feels welcomed by the team and begins to understand their role in MU Extension and Engagement’s mission of serving Missourians. Employee begins to understand workplace rules, policies, procedures, and technology resources.

* Greet employee on their first day. Please identify a designated greeter for new employee, especially for first day of employment. Consider county administrative staff, council members, or other dedicated personnel to greet new hires on their first day and to be available to them to answer questions.
* Off campus employees need to have their I-9 certified on the first day of employment. This is normally arranged by Diane Dews in Extension HR with an Extension employee who is in the location of the new employee.
* Introduce employee to others in the workplace (Regional Directors for off-campus employees, Direct Supervisor for Campus employees.)
* Arrange for a phone, Zoom, or in person welcome from Regional Director, and Education Director.
* Present and discuss *Welcome Packet* including onboarding schedule with the employee.
* Arrange for a lunch or welcome celebration.
* Issue any keys for building access.
* Provide office, department, and building tour while discussing policies regarding parking, building access, restrooms, water fountains, vending machines, kitchens, refrigerator, emergency kits, etc.
* Discuss department or building-specific safety plans including fire, tornado, earthquake, COVID-19 protocols, active shooter, etc.
* Regional Directors for off-campus employees and Direct Supervisors for campus employees should complete the following:
* Encourage employee to sign up for MU Alerts at <https://mualert.missouri.edu>
* Arrange for an employee photo to be taken and uploaded for the website.
* Arrange for employee to obtain their MU Faculty/Staff Identification card: <https://doit.missouri.edu/about/policies-procedures/id-card-policies/>
* Explain policies and procedures for overtime, use of paid time off, holidays, call-outs, weather cancellations, etc.
* Explain any flexible work policies or telework arrangements and procedures.
* Offer new staff a basic computer orientation at their desk. Include computer sign-in, frequently visited websites, Outlook, listserv subscriptions or email distribution lists, remote access, or other program specific technology resources.
* Encourage new employee to enter onboarding schedule into their Outlook calendar.
* Encourage new employee to ask questions.
* Suggest new hire contact their mentors to introduce themselves and confirm first mentor/mentee meetings.

**First Week**

Outcomes: New employee begins to feel settled into their new working environment. Employee gains a better understanding of internal processes, team culture, and performance expectations.

* New employee works through MU Extension and Engagement’s *New Employee Orientation* email.
* Employee begins to implement their onboarding plan by attending meetings, participating in scheduled activities, and engaging with others.
* Regional Directors should review appropriate travel reimbursement processes in the regions. Direct Supervisors should do the same for campus employees.
* Regional Directors ensure new hires have scheduled their first local Extension Council meeting.
* For county or regional faculty, Regional Directors should conduct a driving tour of the county with supervisors, mentors, another employee, council member, or designated person in that county. Consider additional tours of other counties in the employee’s triad.
* Schedule and conduct regularly occurring one-on-one meetings to ensure employee achieves role clarity in understanding their performance expectations. Make connections between their specific job description and the core competencies of *Educate, Create, and Connect*, and by-laws. Ideally, Regional Directors and Education Directors should schedule at least one check-in per year with new hires, together.
* Debrief with new employee often after they attend initial meetings and/or trainings. Ask employee what they have learned and how that information can be used to ensure successful performance.
* Conduct a face-to-face meeting with Regional Director by the end of the first week.
* Check in with Education Director by phone or Zoom by end of the first week.
* Check in with assigned mentors.
* Complete mandatory online compliance training by logging into Percipio: [myLearn | University of Missouri System (umsystem.edu)](https://www.umsystem.edu/ums/hr/mylearn)
	+ Building a Foundation: Discrimination Prevention and Title IX.
	+ Campus Emergency Alert Training.
	+ Global Cybersecurity Basics – Information Security Awareness.
	+ If applicable, required One Card training.
	+ Other job-specific compliance or required training.
* Provide an overview of technology training including myExtension, myVita, muextensionway, and other frequently used software.
* Instruct employee to set up profile and upload a professional picture in myHR: <https://myhr.umsystem.edu> An instructional video to complete this step can be found at: <https://www.youtube.com/watch?v=LmAl6llJa2Y&feature=youtu.be>
* Consider professional development assessments such as True Colors, CliftonStrengths, Emotional Intelligence, etc. as a means for employees to develop respectful and purposeful relationships with other team members. Individually debrief their assessment results and set a time to share results and application with other team members.

**First Month**

Outcomes: New employee recognizes their performance relative to their roles, responsibilities, and job performance expectations. Employee has begun the process of building effective, trusting relationships with team members and key constituents. Employee continues to learn about the organization and has a clear understanding of their developmental needs.

* Continue to meet regularly to provide on-going and meaningful feedback and answer questions.
* Ensure employee has completed all required HR paperwork including benefits, retirement, etc.
* If possible, arrange for employee to participate in Columbia campus New Employee Orientation. These sessions are typically scheduled for the first and third Wednesdays of each month. Employees may register for this session through Percipio: <https://www.umsystem.edu/ums/hr/mylearn>
* Describe and discuss MU Extension and Engagement’s support units and how to access their services. Include Marketing and Communications, Human Resources, Fiscal, Web Services, MU Conference Office, Professional Development, etc.
* Because faculty will be meeting with a variety of people and groups in their position, ask employee to create and deliver a short presentation on who they are, their role in MU Extension, and their focus area. Offer feedback.
* Set specific performance expectations regarding their responsibilities with Educate, Create, and Connect.
* Continue to set specific expectations and standards for reporting outputs, outcomes, and impact.
* Arrange for employee to work with their Education Director to schedule curriculum training sessions.
* Arrange for employee to attend local Extension Council meeting in their headquartered county.
* Schedule and attend any relevant meetings, council planning, chamber, civic, or other community groups, etc.
* Schedule and attend meetings with all Community Engagement Specialist in the employee’s coverage area.
* Arrange a meeting with new employee, mentor(s), and supervisor to review first month’s progress, adjust onboarding schedule as needed, and answer questions. Remind new hires that mentoring relationships are mutual and encourage employee to reach out to mentors when needed.
* Schedule and attend applicable training opportunities for new employee based on their experience and need. Training may be online, or in person. Development could also include self-directed strategies, job shadowing, cross training, etc. Examples of possible training or development topics could include:
	+ Program-specific training.
	+ All Things Missouri, myExtension, myVita, myHR, PeopleSoft, Microsoft Office, Teams, Zoom, or other technology training.
	+ Fiscal training, travel and expense reports, purchasing.
	+ Supervisory or other professional development topics.
	+ Facilitation and presentation skills.

**First Three Months**

Outcomes: Employee is fully aware of their roles, responsibilities, and expectations. New employee begins to work independently and produces meaningful work outputs. New employee feels accustomed to their work environment and has socially developed a sense of community with their teammates.

* Take employee out to lunch to discuss their onboarding progress and discuss any roadblocks or obstacles.
* Conduct first GROW session with new employee. GROW stands for *Goals, Results, Opportunities, and Way Forward*. Use the following suggested questions to guide your GROW discussions:
* *Goals:*
	+ What are your onboarding goals?
	+ How have you prioritized your onboarding goals?
	+ How would you define success for each goal?
* *Results:*
* What results/accomplishments have you achieved in relation to your onboarding goals?
* How would you describe your progress? What milestones or benchmarks have you reached?
* How will you know you have successfully reached this goal?
* In thinking about your onboarding plan and schedule, what has worked? What hasn’t?
* *Opportunities:*
* What’s next? Where should your focus be in the coming months?
* What areas of the job do you feel still needs some attention?
* What additional knowledge, skills, information, relationships, or development do you need to move forward with your onboarding plan?
* *Way Forward:*
* What is your next step?
* How will you meet your goals?
* What specific action steps will you take?
* What changes to the onboarding plan should we make to ensure you are meeting your goals?

**First Three Months (con’t)**

* Continue delegating assignments that are challenging and realistic.
* Remind employee to consider joining a professional Extension association(s): <https://muextensionway.missouri.edu/support-units/professional-associations>
* Review MU Extension and Engagement’s *Core Competencies* and *Individual Development Plan (IDP)* documents*.* Instruct employee to self-assess their skills against the competencies and in partnership with supervisors and mentors, create a customized IDP.
* Arrange for employee to work with their Education and/or Regional Directors to begin creating a plan of work.
* Review and discuss Affirmative Action plans.
* Discuss NTT process and short- and long-term career progression and pathways: <https://muextensionway.missouri.edu/support-units/human-resources/ntt>
* Review and discuss Extension Faculty Bylaws: <https://extension.missouri.edu/media/wysiwyg/Extensiondata/ExtensionWay/Docs/oee/ExtFacultyBylaws.pdf>
* Arrange for new employee to shadow mentor or other faculty as they deliver programs and services. Schedule new employee to team teach with experienced faculty members and/or mentors.
* In collaboration with their Education Director and/or Regional Director, identify one program-specific educational event or information session for the new hire to implement on their own. Set the expectation that the new hire will complete this session on their own from beginning to end, including:
* Enter the program into myExtension.
* Market the session.
* Deliver the program or information session
* Conduct evaluation process.
* Report outcomes in myExtension.

**First Six Months**

Outcomes: Employee feels confident and fully engaged in their new role while continuing to learn. Employee is contributing to the team in meaningful ways and has developed trusting relationships with peers.

* Review progress on onboarding plan, make final adjustments.
* Ensure IDP is in place and being implemented.
* Meet with employee and mentor(s) to discuss progress, future plans, and opportunities to improve the mentoring process.
* Review progress on Connect Strategy. Discuss who new hire has met, relationships developed, and additional progress to be made.
* Conduct six month GROW conversation. GROW stands for *Goals, Results, Opportunities, and Way Forward*. Use the following suggested questions to guide your GROW discussions:
* *Goals:*
	+ What are your onboarding goals?
	+ How have you prioritized your onboarding goals?
	+ How would you define success for each goal?
* *Results:*
* What results/accomplishments have you achieved in relation to your onboarding goals?
* How would you describe your progress? What milestones or benchmarks have you reached?
* How will you know you have successfully reached this goal?
* In thinking about your onboarding plan and schedule, what has worked? What hasn’t?
* *Opportunities:*
* What’s next? Where should your focus be in the coming months?
* What areas of the job do you feel still needs some attention?
* What additional knowledge, skills, information, relationships, or development do you need to move forward with your onboarding plan?
* *Way Forward:*
* What is your next step?
* How will you meet your goals?
* What specific action steps will you take?
* What changes to the onboarding plan should we make to ensure you are meeting your goals?

**First Year**

Outcomes: Employee is fully engaged and confident in their role. Working more and more autonomously, the employee applies the knowledge and skills learned to make meaningful contributions to the mission of MU Extension and Engagement. Employee has built effective, trusting working relationships with colleagues and other critical stakeholders, and has a strong understanding of MU Extension and Engagement’s culture.

* Celebrate successes and recognize new employee’s contributions.
* Continue to provide ongoing and meaningful feedback.
* Conduct annual performance review.
* Finalize Year 2, Plan of Work.
* Meet one-on-one to discuss *IDP* progress to date. Encourage employee to identify future career goals including NTT process and plan for future professional development.
* Explore opportunities for employee to participate in MU Extension and Engagement committees, and campus or cross-functional teams.
* Solicit employee’s feedback and suggestions on ways to improve the onboarding experience. This can be done one-on-one or with a small group of new employees.