



Southern Region Middle Managers News

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On Boarding Issue

North Carolina Extension Orientation System: A Summary

The Extension Orientation System in North Carolina is divided into four components which include:

- Personnel orientation
- District Development
- Campus orientation
- County professional development

During Personnel Orientation, new extension professionals will meet for nearly a day for an introduction into the Extension Personnel System focused predominantly on personnel benefits with an overview of campus and county responsibilities and policies. An introduction into the Extension Organizational System is included with an overview of the mission and vision of



the organization, a presentation of the organizational chart and orientation timeline for staff development. A self-study guide, intended to be accomplished during the year, is presented to the new extension professional as a way to become familiar with county based personnel, programming and operations, and campus support, particularly with specialists.

During the initial year of the extension professional, a 2-day campus orientation workshop is orchestrated around a standard curriculum and serves to introduce new professionals to county and campus based personnel. There are four main topical areas:

1) individual development and self-awareness; 2) organizational introduction and development (including development of organizational knowledge, the culture of extension and ethics for the extension professional); 3) essentials in communication and technology, working with the media, and volunteer management, and 4) introduction of the programming framework including sharing and marketing of success stories. The orientation training benefits new professionals with foundational knowledge and the development of competencies necessary for job performance and career development. As professionals' mature within the organization, learning becomes more self-directed to maintain one's subject matter expertise as well as develop and meet long-term career goals.

In addition to the self-study guide and the 2 day campus orientation, each District Director meets with their new extension professionals during the first year to discuss organizational and district level expectations, the importance of the reporting process, the value of county and district teamwork, networking and the importance of programming to their overall success in the counties.

County Extension Directors (CEDs) are the main source of professional development for county professionals including the newly hired. The CEDs provide all county professionals with performance reviews and assistance with annual work plan development. Each professional is assigned a seasoned professional (or professionals) to continue developing a familiarity with expectations, policies and procedures, programs, advisory councils, and other networks within the Extension system.

A new Extension Organizational Development web page is under development, to assist all Extension Professionals in transitioning into their new role and ensuring ongoing development. A new programming model is also being developed between NCSU and NCAT University that incorporates face to face training and online modules which includes program assessment, design, and evaluation. **Mary Lou Addor**, mary_addor@ncsu.edu

CEADS – Kentucky's On-Boarding System

The County Extension Agent Development System is divided into three major phases. These phases are orientation, core training and professional development. The nature of these professional learning experiences changes in accordance with the

tenure of the agent for which the experience is planned. The orientation phase of an agent's development involves:

- participating in a Lexington based orientation session with other new agents
- visits with the District Director
- the mentor program, and
- visits with more experienced agents, becoming more familiar with ongoing programs and office procedures, and available technology.

In the core training phase, all agents participate in the same standard curriculum. Over the first year of employment, agents will participate in three core curriculum training sessions, each focusing on a different theme. The sessions are held at various locations across the state and range from two to three days in length. The topics for the five sessions are individual and organizational development, management skills, and program development. The order in which new agents participate in these three sessions will vary according to the date of initial appointment.



The purpose of these training is to help agents acquire the base level knowledge and skills needed on the job. As tenure with the organization increases, learning becomes more self-directed and can select the learning experiences that help them remain current in subject matter, the profession and meet long-term career goals, or respond to emerging local programming needs.

In addition to formal new agent orientation and training, District Directors meet with the new agent during the first week to discuss expectations, reporting, teamwork, networking. Periodic Progress Reviews with new agents are conducted after 3, 6 and 12 months to ensure adequate professional development.

There is also a formal Mentoring Program in which the new agent is paired with one or more tenured agents who can serve as a source of immediate support. A web page has also been created to help agents transition into their new role. The web page outlines some general job related duties and functions that agents should be addressing during their first six months on the job. This helps keep new agents on the right track.

In an effort to reduce the amount of time new agents spend out of the county in training, some of our more general New Agent Orientation topics have been integrated into Online Modules that agents complete while at their work location. All agents who supervise must also attend "Supervision" Training.

Jeff Young, jeffery.young@uky.edu

Oklahoma Extension Educator Orientation and On-boarding Summary

The Oklahoma Cooperative Extension Service hires Extension Educators with the understanding that while they may have a general knowledge of Extension, many of them lack a working knowledge of the Extension system and its intricacies. In an effort to better prepare the new hires to be successful in their jobs, the following on-boarding processes have been implemented:

- New Educator Orientation sessions (3) are held on campus in Stillwater as soon as six new educators enter the system. The orientation includes a variety of topics, including sessions on OSU Cowboy history, Philosophy of the Land Grant System and Cooperative Extension, Civil Rights, Affirmative Action and Gender Discrimination, Program Planning (Logic Model), Marketing, Professional Development, Advisory Committees, Policy and Procedures, Working with Diverse Audiences and People, Addressing Controversial Public Issues, Extension Finance and Travel Resources, Human Resources & Technology Services
- Recently, OCES has added departmental visits to better acquaint Agriculture Educators with specialist resources offered from the state level. Educators travel in groups to campus for the departmental visits. Typically, two departments are visited in one day.
- Extension Area and District Specialists spend extended time with new hires during the first year of employment to make them aware of the resources available to them from the district and area level. The specialists typically visit the new Educators in the county offices; however, it is also common practice for the new Educators to visit the district and area specialists in the district office at least one time in their first year.



Extension Educators with the understanding that while they may have a general knowledge of Extension, many of them lack a working knowledge

- New Educators are assigned to Mentors very soon after they are hired in the system. Mentors are selected based on program area, expected compatibility, distance between offices, performance, etc. The formal mentoring process lasts for one year; however, it is desirable for the mentor and mentee to develop long lasting relationships that are of mutual benefit.
- District Ext. Directors and District Program Specialists work together to develop a schedule for new Educators to visit other counties of similar demographics and programs. Typically, a new educator will visit at least three other counties for a half day each. The District Extension Directors and District Program Specialists develop specific topics of discussion for each county visit.

Discussion is ongoing on developing online modules to replace some of the on-campus orientation sessions in order to make more efficient use of time and travel resources. **Claude Bess**, claud.bess@okstate.edu

Clemson's New Agent Training Program

Clemson CES utilizes a three part new agent training program built around three main components: mentoring, online orientation and formal orientation training. All new agents are exposed to each part of the program in their 1st year of employment.



Online Orientation

Immediately upon their official start date, each new employee is required to complete an online orientation program. Designed as a self-study tool, the orientation's 14 lessons are intended to strengthen the agent's skills in basic competency areas. These lessons include topics such as program development, evaluation, working with advisory committees, time management and communication. The on-line orientation is found at www.clemson.edu/staffdev under "New Employee Orientation." Additional on-line educational modules and distance training will be available focusing on the professional development competency areas through the Staff Development Department website and office.

Mentoring

As a follow-up to initial self-study orientation procedures, each new agent is placed under the

direction of an experienced, highly qualified agent called a mentor or lead agent. Mentors are available to answer questions, check on the agent's progress periodically, and encourage good performance. The new agents also meet regularly with their supervisor to plan programs and check progress. The new agent will be expected to take full responsibility for following through with the mentoring process. Help is also available from administrators, Extension Specialists, subject matter program coordinators, staff development personnel, and county office staff.

The new agent will receive a letter of welcome from the Extension Field Operations Office, along with a packet of suggested activities for the new employee. During the first month of employment, the new agent is assigned to two agents in different parts of the state. The agent will set up a visit with these agents to observe and discuss program planning and implementation. During visits with mentors and others, topics such as roles, relationships, introduction to on-line orientation, planning stages and evaluations, time and office management, etc. should be covered.

Formal Orientation Training

When there is a sufficient number of people to merit a face-to-face orientation, new employees are invited to campus for a session to introduce them to Cooperative Extension. If the group includes office support staff, the program is tailored to meet the needs of the two groups and provide separate sessions that will be meaningful and appropriate for each. Topics included in this program are: history of Extension Service, program development and evaluation, management of county technology (equipment), Civil Rights, program accountability, applying for and processing of grants. In lieu of face-to-face training, Staff Development will offer training via electronic conferencing. Additional training is offered through professional associations, graduate and certificate courses, and through continuing education.

In addition to the new agent training activities, numerous additional resources on topics relevant to all Extension work including, but not limited to: communication (public speaking, working with the media, emergency risk communication) and interpersonal/human relationship effectiveness (professional ethics, conflict management, effective facilitation, volunteer recruitment and management) are available through web based training modules.

Additional staff development and training resources are maintained on the Staff Development homepage at www.clemson.edu/extension/staffdev. **Blake Lanford**, blakel@clemson.edu

FL New Agent Training

UF/IFAS Extension is currently revising its onboarding process for new faculty. Prior to 2015, new county faculty participated face-to-face on teaching program and



in two, 1.5 day sessions focused and learning, development evaluation, and county operations. Our revised model is inclusive of county and state faculty and county program assistants. All are invited to attend two, 2.5 day face-to-face sessions. There will be a continued emphasis on the topics traditionally covered, but a new focus on developing a faculty cohort through purposeful team-building activities and another on working with different personalities. The 2015 sessions will continue to require new faculty to complete preparatory work prior to the face-to-face sessions, a component which was added in Fall 2014. Participants must complete modules within the online Extension Teaching and Learning Certificate, bring copies of lesson and program plans, and review various articles and EDIS publications. The required readings and supplemental resources are hosted for new faculty using UF's eLearning platform, Sakai. The goal is for new faculty to arrive ready to apply the principles they've reviewed, with guidance from the IST instructors. Evaluation feedback from the Fall cohort indicates new faculty are amenable to completing preparatory work but have varying levels of comfort navigating the online learning environment. **Amy Harder**, amharder@ufl.edu

District Directors continually reinforce the lessons learned during new agent training but also employ complimentary efforts. Typically, the DED will meet with the new agent during the first two weeks of employment and discuss expectations etc. using our Guidebook for Socializing and Orienting New Extension Faculty. Discussion may include:

- online modules
- office procedures
- shadowing other agents at program events
- introduction to our teaching evaluation tool
- annual reporting and evaluation processes

- programmatic Specialists
- professional development Specialists & plan
- introduction of a mentor
- district procedures and resources
- best way to communicate with DED
- overview 3yr progress assessment, promotion and permanent status processes
- timeline for submitting a draft Plan Of Work
- recommendations to attend
 - ROA discussion sessions
 - All Faculty meetings
 - subject matter working groups

This is a continuing process that generally spans the 1st full year (with frequent refreshers) of the agent's tenure. **Joe Schaefer**, natres@ufl.edu

Foundations Program for Newly Hired Agents in Georgia

Cooperative Extension at the University of Georgia provides a multi-tiered approach to training and developing newly hired County Extension Agents. "Foundations" is the formal title for the development program for new agents. The Foundations program is a combination of institutional-directed and agent-directed activities. The objectives of the Foundations program are to:



- provide info on policies, procedures, & benefits
- expose agents to the vision, mission and philosophy of Cooperative Extension and the College of Agricultural and Environmental Sciences
- identify the agent's role in fulfilling Extension's mission
- establish a sense of professionalism and pride
- provide basic program area content information
- introduce agents to available resources to assist with county programing
- build a personal professional development plan

The *Foundations* program consists of an average of 13 days of out-of-county training, an online learning module, the assignment of a mentor, completion of in-county orientation checklists, and creation of a staff development plan.

During the first 45 days of employment the agent is expected to complete an online *Introduction to UGA Extension* module, attend *Policies, Procedures and Protocol* statewide training and participate in a district directed new agent training. During the first 18 months of employment, all agents complete the required formal, out-of-county, *Foundations* trainings. There are four general topic sessions – program planning (2 days), skills & tools (3 days), basics of youth development (1.5 days), and communications (3 days). In addition to the four general topics a program area specific training is provided. This training ranges from 3 to 5 days.

The in-county orientation process is guided by a series of checklists, the assignment of a mentor, and guidance by the Program Development Coordinator. The new agent navigates the in-county orientation through structured meetings with the County Extension Coordinator (CEC), County Extension Secretary (CES), District Extension Director (DED), and Program Development Coordinator (PDC). Checklists are provided to assist the agent in navigating the details of each conversation (<http://www.caes.uga.edu/intranet/foundations/agentorientation.html>).

In addition to the training opportunities, there is a formal process for the assignment of a mentor for new agents. The District Extension Director assigns a mentor to work with the new agent during the first year of employment. The expectation is that the mentor initiates contact with the agent within the first week of employment, meets within the first month and a minimum of three visits are held. An observation visit to a county which is demographically and programmatically different from the agent's base county is scheduled. There is a formal training and minimum employment requirement for individuals to serve as a mentor.

Agents build a staff development plan, with input from your CEC, DED and PDC, identifying classes and trainings beneficial to them and their county program. Agents are also encouraged to consider other professional development opportunities.

The process above is initiated with a letter from the Program and Staff Development specialist to the newly hired agent welcoming them to the organization, directing them to the *Introduction to Extension* module, providing their training schedule and directing them to the *Foundations* web site (www.caes.uga.edu/intranet/foundations/index.html).

The newly hired agent, County Extension Coordinator, Program Development Coordinator, District Extension Director and the Mentor all contribute to making sure the program is worked to its highest potential. The formal outline of expectations provides a road map to make sure newly hired agents have the tools they need to be successful in their county. **Marcie Simpson**, simpson@uga.edu

New Extension Agent On-Boarding in VA

New Extension Agent on-boarding in Virginia is an ongoing process that begins with orientation that can consist of several different opportunities and continues with more formal and informal training and professional development throughout the first several years of employment with Virginia Cooperative Extension. The various aspects of on-boarding, training, and professional development of the new agent is outlined below:

- All new agents are required to visit campus within the first few days of employment to meet with Human Resources regarding benefit selections (Health Insurance, Retirement, Leave Benefits, etc.). This initial visit also includes a brief intro to campus based extension personnel.
- District Directors (sometimes in conjunction with the District Administrative Assistant) will meet individually with new agents.
- District Directors assign a mentor/ mentors to work directly with a new agent.
- All new agents complete an extension skills inventory survey to identify areas of strength and weakness as it relates to extension programming. This provides the District Director, District Program Leadership Team, and the new agent specific information to help tailor the future training experiences.
- Semi-annually an in-depth new agent orientation is conducted at Virginia Tech.
- Annually an in-depth new agent orientation is conducted at Virginia State University.
- District Program Leadership Teams conduct district level trainings on a quarterly basis for new agents on a variety of topics regarding extension programming.



- New agents will attend program specific subject matter training at the state level throughout each year (ex. Pesticide In-service, Master 4-H Camp Training, etc.)
- A Winter In-Service Conference is conducted every year where all extension agents visit campus for a multi-day programmatic and subject matter training.
- A Fall District Conference is conducted in every district where all extension agents meet for administrative and programmatic updates.

The purpose of these trainings and opportunities for personal interaction is to help acclimate and prepare the new agent with the basic skill sets needed to be successful in their new role. Every new agents' on-boarding and training experience can and will be different based on their program area of expertise, specific needs of the individual, expectations of the District Director, and the differences in the district level training opportunities that are offered. A new agents' on-boarding experience is also impacted by the time of the year that they are hired, therefore the order in which they receive certain trainings listed above will be determined by their date of hire.

Lonnie L. Johnson, lojohns2@vt.edu

Orientation for Alabama Cooperative Extension System's New Employees

Prior to March 2014, all ACES onboarding and orientations were conducted by program area, department or unit leaders. In addition, each employee attended a university Human Resources session designed to inform new employees of university benefits, pay periods and direct deposits, and other steps they needed to complete.



Onboarding Online. In 2014, Extension launched an [onboarding section](#) to its website. The Onboarding site is based in part on the results of a survey sent to employees hired within the previous five years and focuses on structure, policies, and other information useful to all employees. The first iteration of online new employee training consists of a series of links to forms, reading materials, recorded webinars, and other resources. In addition, new employees are to meet with their direct supervisors to discuss specific topics and issues related to their job assignments.

Assignments are grouped within the first day, first week, first month and monthly for the first six months. For example, the first two weeks includes basic information about mentoring, forms, history of Extension, our policies, mission and organizational structure, and information about each of our program areas. Also included in the first two weeks and the first month sections are recorded comments from employees that have been with ACES for a while. A checklist reflecting the assignments is provided for download. Upon completion, the checklist is to be signed by the employee's direct supervisor and then submitted to the ACES HR Manager.

Mentoring Each assistant director offers a mentoring program for new employees. The new employee is either matched with another employee or chooses his or her own mentor from a list of colleagues with nearby assignments.

Face-to-face Additional training will be provided twice a year in a workshop setting. The 1 ½-day training focuses on the practical things new employees need to know/do/learn to be successful at their jobs. Topics include *Why Your Work Matters*, *Teaching Youth and Adults*, *Manage Your Time and Build Relationships*, and *Balance Work Life with Personal Life*. The first workshop was held November 2014. Subsequent sessions will occur in May and November. **Virginia Morgan White**, morgamv@auburn.edu

Arkansas New Employee Onboarding for County Agents

- ❖ AK New Employee Online Welcome Center: <http://develop.uaex.edu>; <https://uofaces.wordpress.com/>
Online Welcome Center has videos, links to helpful pages, and lists of resources
- ❖ Arkansas New Employee Onboarding binder: contains guides/checklists for first year of employment (1 guide for new employee, one for direct supervisor, and one for mentor. (Contact Arkansas's Program and Staff Development department head, Dr. Rich Poling for information on acquiring copies)



- ❖ Arkansas offers several online

courses for new employees including the following:

- Southern Extension History
- Program Development with Logic Models
- Evaluation Planning and Management
- Extension 101: Becoming an Extension Professional

- ❖ Arkansas offers face to face trainings for new employees:
 - Check in and Tune Up for New Hires Workshop – 1 day
 - Filling Your Extension Toolbox – 4 days
 - Writing Impact Statements – 1 day
 - Communication College -1 day
- ❖ New county agents hired in Arkansas are assigned a mentor for their first year of employment. The district director makes the mentoring assignment.
- ❖ New employees in Arkansas are encouraged to “shadow” their mentor and other veteran agents.
- ❖ The Arkansas onboarding process is evaluated through a series of confidential interviews with new employees, supervisors, and mentors throughout the first year of employment.

Sharon Reynolds, sreynolds@uaex.edu

Tennessee Onboarding

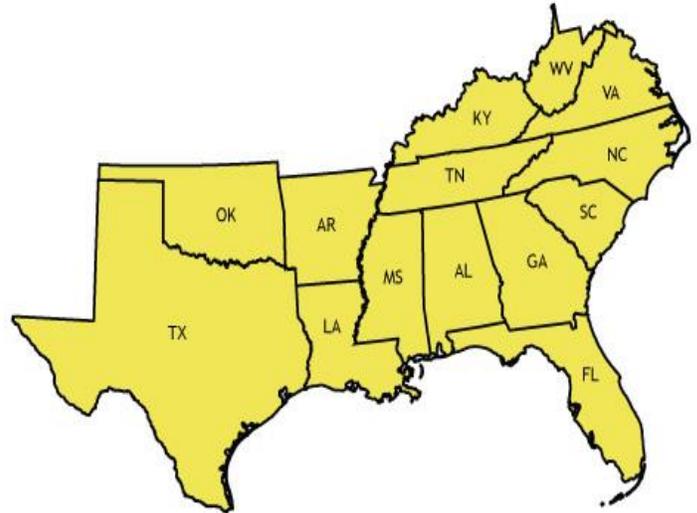
Onboarding for new Extension employees consists of 3 primary components: mentoring, coaching, and a one-week new employee orientation.

- Tennessee Extension has an aggressive and structured mentoring program. When new employees are hired, they are assigned 3 mentors, who typically are agents in their program area(s) in surrounding counties. During the first year of employment, new employees meet with each of these mentors 3 times, for a total of 9 mentoring sessions. Each session has specific goals, and a simple, one-page summary is prepared for each session and submitted to the regional office.
- Tennessee Extension has 2 program leaders at the regional level to provide new employees with coaching in their respective program areas. During the first year of employment,



program leaders typically make at least 2 visits to each new employee to discuss questions, ideas, and challenges.

- Twice a year, UT/TSU Extension holds a new employee orientation where we teach new employees about Extension program planning, reporting, civil rights responsibilities, and the structure of UT and UT Extension. Because we hold this twice a year, a new employee is assured of attending orientation within their first 6 months. **Ben West**, bwest10@utk.edu



So there you have it, a snapshot of Extension on-boarding efforts from across the SE. We hope you've found something in this newsletter that might be useful to you and I'm sure our authors would be glad to correspond with you concerning nuances of the approaches mentioned. I do heartily thank those who contributed to this newsletter, many of whom are new to our newsletter effort, for their steadfast support and excellent reporting. You may wish to share this newsletter with your professional development folks too as it is really right up their alley, and please share with your Deans and Directors.

Thanks everyone!

Respectfully submitted:
Charlie Vavrina, DED, UF