DEA / CED

First Step Month (Within First Week of First Step Experience)
Agenda “A” for New County Extension Agent Onboarding
Revised 8/1/09

Overall Guiding Expectations of DEAs and CEDs throughout the two year onboarding experience:

- Teamwork at all levels
- Be honest, caring, sincere, and offer suggestions
- Be flexible whenever possible
- Set meeting dates as far in advance as possible; send agendas
- Include Agent involvement whenever possible in decisions affecting the county/district
- Have a supportive role in helping agents to become successful

New Agent Information:
Name: __________________________
County: __________________________
Position: __________________________
Start Date: ________________________
Date of this meeting: ________________

DEA / CED Agent Onboarding Agenda, First Step Month

<table>
<thead>
<tr>
<th>Intended Outcomes</th>
<th>DEA/CED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>Welcome the new Agent in their First Step county; preferably on the first day of employment. This would be done face-to-face ideally; however, it is acceptable to complete this meeting by teleconference or Centra. The focus of this conversation should be to make the new Agent feel welcomed to Extension, as well as to let them know that you are available for any assistance as they begin a new career with Extension.</td>
</tr>
</tbody>
</table>
| First Step Policies, Procedures and Goals | Conduct First Step Orientation with Host County and New Agent, covering the following items (the expectation is that all county agents will participate):
Review First Step Guidelines Manual with First Step Hosts and New Agent
Discuss dates of activities and opportunities in the First Step county for the month
Determine what other opportunities need to be provided for the new Agent in other counties
Determine a day for new Agent to come to District Extension Center. This day will include: time with District Office Manager, District 4-H Secretary, DEA, and if available, RPDs. This is also a time for new Agent to meet specialists in the building.
Review procedures for travel reimbursement
Have District Office Manager contact Extension’s County Programs office to ensure Travel Authorization and any other necessary paperwork regarding travel is complete
Help arrange lodging for new Agent if necessary
Provide Agent with First Step Journal and New Agent Study Guide, and get them started working on these onboarding tools.
Answer questions or concerns   |
<table>
<thead>
<tr>
<th>First Step Policies, Procedures and Goals Continued</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <strong>During the First Step Month, cover these items:</strong></td>
</tr>
<tr>
<td>• Contact new Agent and host Agents once a week if possible to field questions and determine if the training is on track.</td>
</tr>
<tr>
<td>• Encourage new agent to submit travel voucher every two weeks. Encourage them to submit it to the District Office Manager for review first.</td>
</tr>
<tr>
<td>• <strong>End of FIRST STEP Month or Immediately Following:</strong></td>
</tr>
<tr>
<td>• Conduct exit conference involving new agent and host agents. Review FIRST STEP experience. Assist new agent in developing a plan of action for first month on the job in county of hire.</td>
</tr>
<tr>
<td>• Determine if further assistance is needed with new agent.</td>
</tr>
<tr>
<td>• Provide one day of administrative leave for each agent in host county.</td>
</tr>
<tr>
<td>• Express appreciation in writing to host county agents and support staff.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Introduction to Extension History and Programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Provide New Agent Newsletter #1, <em>Our Legacy, Dr. Seaman Knapp</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dates for Next Conference</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Date set for follow-up conference- First Step Exit Conference (face to face or by phone), this should be held the end of month 1.</td>
</tr>
</tbody>
</table>

**Notes:**
Overall Guiding Expectations of DEAs and CEDs throughout the two year onboarding experience:

- Teamwork at all levels
- Be honest, caring, sincere, and offer suggestions
- Be flexible whenever possible
- Set meeting dates as far in advance as possible; send agendas
- Include Agent involvement whenever possible in decisions affecting the county/district
- Have a supportive role in helping agents to become successful

**New Agent Information:**

Name: __________________________
County: _________________________
Position: ________________________
Start Date: ______________________
Date of this meeting: ______________

This first formal meeting with the new Agent is a face-to-face meeting that takes place in the Agent’s home county office or at a central location if multiple agents are included in conference. This meeting should be during the agents first week in their home county, but scheduling may make this difficult. In some cases, it would be good to include the new Agent’s assigned Mentor in this meeting; however, that will be left up to the discretion of the DEA/CED.

**DEA / CED Agent Onboarding Agenda, Month 1 (First month in Home County)**

<table>
<thead>
<tr>
<th>Intended Outcomes</th>
<th>DEA/CED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome (for agents not participating in First Step)</td>
<td>• Welcome the new Agent, who did not participate in First Step, to their county: preferably on the first day of employment. This would be done face-to-face ideally; however, it is acceptable to complete this meeting by teleconference or Centra. The focus of this conversation should be to make the new Agent feel welcomed to Extension, as well as to let them know that you are available for any assistance as they begin a new career with Extension.</td>
</tr>
<tr>
<td>Introduction to Extension History and Programming (for agents not participating in First Step)</td>
<td>• Provide New Agent Newsletter #1, Our Legacy, Dr. Seaman Knap, to any agent that did not participate in First Step</td>
</tr>
</tbody>
</table>
| Extension Philosophy | • Our Legal Basis and Purpose  
• Smith-Lever Act 1914  
• The Land Grant System  
• Our Link to County Government  
• AgriLife Extension Organizational Chart  
• Mission and Scope  
• Core Values  
• Briefly discuss how agents should not handle money and prepare agent for more information to come during this month, via an online Moodle course.  
• Civil Rights/ Affirmative Action/ADA |
| Roles and Responsibilities | • Review Position Description and Job Responsibilities Assignments  
• Calendar of events (county, district, regional and state)  
• Basic overview of roles and responsibilities of agents from all program areas which include:  
  • Agriculture and Natural Resources  
  • Family and Consumer Sciences  
  • 4-H and Youth Development  
  • Community Resources and Economic Development  
• Additional Subject Matter Areas Addressed by Specialty Agents  
• Basic information regarding Extension branding. Agents will receive more information when they attend Extension Foundations |
| Professional Relationships | • Personnel Directory – review key contacts  
• County Extension Director  
• Specialists  
• Organizational Chart  
• Secretarial Staff  
• 1890 Cooperative Extension Program  
• Military Programs  
• County faculty- AG/NR, FCS, 4-H, CRED, CEP, IPM, Hort, BLT, ENP, Marine, etc.  
• County coordinator  
• 4-H coordinator  
• Office manager-support staff  
• County Commissioners’ Court |
| Ethics/Work Habits/Policies | • Keeps informed of rules and checks website- [http://aghr.tamu.edu/policies.htm](http://aghr.tamu.edu/policies.htm)  
• Discuss Cash Management. This will be in conjunction with an online training module.  
• Extension agents are professional educators that are public servants and the public comes to us because they choose to come.  
• Discuss maintaining effective office hours, work habits and office appearance, professional appearance.  
• Understands leave policies regarding jury duty, sick leave, vacation (must work six months), and emergency leave.  
• Understands travel policies regarding travel authorization for out-of-county and out-of-state travel requests (out-of-state travel requests **must** be submitted 30 days in advance of trip).  
• Exhibits a professional image  
• Serves as a good role model and example |
| Performance Expectations/PAS System | • Attends/conducts regular office conferences  
• Assists with district and state contests and events/ activities/committees.  
• Works with county committees  
• 4 month progress review, 7 month progress review and annual performance appraisal |
| Accountability and Reporting Expectations | • Overview of why accountability is important, TExAS Accountability System, and where it is located- [http://texas.tamu.edu](http://texas.tamu.edu)  
• Define outcome and output program plans |
- Assist agent in adopting Individual Development Plan
- Discuss any questions agent may have about Moodle courses
- County Commissioners Court Activity and Travel Report

**Program Development**
- Awareness and overview of program development process- Introduce the Program Development model- Give new agent a copy of the model
- Discuss use of educational programs for disseminating Extension’s information and facilitating change.
- Explanation of Leadership Advisory Board, program area committees, task forces, and coalitions.
- Awareness and exposure to annual program plans and program planning process
- Provide New Agent Newsletter #2, *Extension Program Development*, during Month 1

**Professional Development**
- Individual Development Plan
- Check on and discuss activities completed in *New Agent Study Guide.*
- Discuss mentor/mentee interaction

**Sources of Support**
- Explain the relationship, functions and expectations between new Agent, Mentor and other agents.
- Go and observe programs conducted by mentor and other agents
- Expectations on seeking assistance from specialists, mentor, RPDs, DEA and others

**Date for Next Conference**
- Date set for four-month review

**Notes:**
DEA / CED

Months 2 - 5
Agenda “C” for New County Extension Agent Onboarding
Revised 8/1/09

Overall Guiding Expectations of DEAs and CEDs throughout the two year onboarding experience:

- Teamwork at all levels
- Be honest, caring, sincere, and offer suggestions
- Be flexible whenever possible
- Set meeting dates as far in advance as possible; send agendas
- Include Agent involvement whenever possible in decisions affecting the county/district
- Have a supportive role in helping agents to become successful

New Agent Information:
Name:________________________________
County:_______________________________
Position:______________________________
Start Date:____________________________
Date of this meeting:___________________

<table>
<thead>
<tr>
<th>Intended Outcomes</th>
<th>DEA/CED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Expectations/PAS</td>
<td>• Conduct 4 month evaluation of new CEA (this happens after three months in home county)</td>
</tr>
<tr>
<td>System</td>
<td>• Develops a plan for recruitment and involvement of volunteers</td>
</tr>
<tr>
<td></td>
<td>• Job expectations for current program year</td>
</tr>
<tr>
<td>Accountability and Reporting Expectations</td>
<td>• Submits office conference minutes and support materials with monthly reports by mail or e-mail.</td>
</tr>
<tr>
<td></td>
<td>• Compliance with reporting deadlines.</td>
</tr>
<tr>
<td></td>
<td>• Review agents’ reports with new agent and make suggestions for improvements.</td>
</tr>
<tr>
<td></td>
<td>• Reporting should be timely, accurate and descriptive</td>
</tr>
<tr>
<td></td>
<td>• Submits County Commissioners’ Court report and monthly travel report to court and to DEA</td>
</tr>
<tr>
<td>Program Development</td>
<td>• Program development process (planning, marketing, implementing, evaluating and interpreting programs through involvement of local people on advisory committees and task force) (Show Model for Program Development)</td>
</tr>
<tr>
<td></td>
<td>• Involvement of specialists and other resources</td>
</tr>
<tr>
<td></td>
<td>• Provide New Agent Newsletter #3, Introduction to Adult Learning Theory, during Month 3</td>
</tr>
<tr>
<td></td>
<td>• Provide New Agent Newsletter #4, Learning Styles and Rate of Adoption, during Month 4</td>
</tr>
<tr>
<td>Professional Development</td>
<td>• Check on and discuss activities completed in New Agent Study Guide</td>
</tr>
<tr>
<td></td>
<td>• Prepare agent to attend “Extension Foundations”</td>
</tr>
<tr>
<td></td>
<td>• Discuss mentor/mentee interaction.</td>
</tr>
<tr>
<td>Roles and Responsibilities</td>
<td>• Discuss Emergency Management in conjunction with the two online training modules the agent will complete during this timeframe.</td>
</tr>
</tbody>
</table>
| Professionalism       | • Follows rules in maintaining effective office hours, work habits and office appearance  
|                      | • Follows policies and procedures regarding travel, supplies, reporting, inventory, entry deadlines, etc.  
|                      | • Exhibits a positive professional image and code of conduct  
|                      | • Communicates well, both orally and in writing  
|                      | • Emphasize the importance of a positive attitude and cooperation with other County Extension Agents, secretaries, clients and others  
| Public Relations/Marketing | • Customer service, timely response to clientele  
|                      | • Works with local news media and other media outlets  
|                      | • Networks with key leaders, collaborators, and county agencies and organizations  
|                      | • Interdisciplinary programming  
| Sources of Support   | • Self-study/reads technical journals, research publications, books, periodicals, etc.  
|                      | • Verify that agents are building relationships with Mentor and other agents  
|                      | • Verify that agents are going and observing programs conducted by Mentors and other agents  
|                      | • Discuss professional development opportunities  
|                      | • Encourage Agent to draw on First Step County and networks  
| Next Date for Conference | • Date set for seven-month agent progress review  

Notes:
DEA / CED

Months 6 - 12
Agenda “D” for New County Extension Agent Onboarding
Revised 8/1/09

Overall Guiding Expectations of DEAs and CEDs throughout the two year onboarding experience:
- Teamwork at all levels
- Be honest, caring, sincere, and offer suggestions
- Be flexible whenever possible
- Set meeting dates as far in advance as possible; send agendas
- Include Agent involvement whenever possible in decisions affecting the county/district
- Have a supportive role in helping agents to become successful

New Agent Information:
Name: __________________________________
County: ________________________________
Position: _______________________________
Start Date: ______________________________
Date of this meeting: ______________________

DEA/CED Agent Onboarding Agenda, Months 6 - 12

<table>
<thead>
<tr>
<th>Intended Outcomes</th>
<th>DEA/CED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Expectations/PAS System</td>
<td>• Conduct 7 month evaluation of new CEA</td>
</tr>
<tr>
<td></td>
<td>• Discuss Performance Appraisal/PAS System annual review expectations, if applicable to specific CEA. This will be applicable if the Agent was hired prior to April 1st.</td>
</tr>
<tr>
<td></td>
<td>• Comprehensive: review PAS document and performance domains</td>
</tr>
<tr>
<td></td>
<td>• Program Progress Review: review the program progress review guidelines and questions</td>
</tr>
<tr>
<td></td>
<td>• Markets and interprets Extension programming accomplishments</td>
</tr>
<tr>
<td>Ethics/Work Habits/Policies</td>
<td>• Strives to attain a balance between work and family life; takes time to maintain health; works continually on self-improvement to maximize job effectiveness; prioritizes family and personal needs.</td>
</tr>
<tr>
<td>Program Development (In cooperation with Regional Program Directors)</td>
<td>• Evaluation</td>
</tr>
<tr>
<td></td>
<td>• Prepare for year-end conference/performance appraisal</td>
</tr>
<tr>
<td></td>
<td>• Provide New Agent Newsletter #5, <em>Levels of Client Change &amp; Intended Outcomes</em>, during Month 6</td>
</tr>
<tr>
<td>Accountability and Reporting Expectations</td>
<td>• Review the TExAS system reports</td>
</tr>
<tr>
<td></td>
<td>• Reviews County Commissioner activity, travel reports and support materials</td>
</tr>
<tr>
<td></td>
<td>• Provide New Agent Newsletter # 6, <em>The Basics of Evaluation</em>, during Month 7</td>
</tr>
<tr>
<td></td>
<td>• Provide New Agent Newsletter #7, <em>Taking Evaluation Further</em>, during Month 8</td>
</tr>
<tr>
<td></td>
<td>• Provide New Agent Newsletter #8, <em>Accountability and Interpretation</em>, during Month 10</td>
</tr>
</tbody>
</table>
| Professional Development | • Check on and discuss activities completed in *New Agent Study Guide*
• New agent individual development plan
• Professional Associations- encourage membership in at least one
• Discussion of mentor/mentee interactions |
|--------------------------|----------------------------------------------------------------------------------|
| Interpretation           | • Interprets program to co-workers
• Interprets program to County Commissioners’ Court
• Interprets program to key leaders, collaborators, county agencies and organizations
• Interprets program to Extension volunteers and program participants |
| External Funding for Extension Programs | • Collaborations, Partnerships and Sponsorships |
| Next Date for Conference | • Date set for follow-up conference
• Date set for exit conference with mentor and mentee |

Notes: