



## Welcome to the University of Maryland Extension Faculty Orientation Checklist

We welcome you as a part of our UME team. We are glad you have chosen to join us in our mission to bring educational opportunities to the residents of Maryland!

UME is built upon a foundation of dedicated professionals working in local communities to provide education and leadership to the residents of Maryland. Your success as a faculty member contributes to the success of our organization as a whole. Your Program Leader (PL) and Area Extension Director (AED) want you to be successful in your role as a faculty member for UME. If you are based in Baltimore City, please replace AED with City Extension Director and county with city when referenced in this checklist.

This orientation checklist has been designed to further your success as a faculty member. It will help you to understand UME and your role as well as prepare you for the critical points along the way. It will be your responsibility, with the help of your PL and AED, to review and complete the tasks on the checklist within the timelines set forth. We also suggest that you seek the advice and assistance of other faculty members and brainstorm about how you can collaborate and share resources.

In order to begin your UME orientation, you will meet with your AED, PL, and local administrative assistant at various times over the next few months to gain the necessary competencies. As you complete each task on the orientation checklist, please note the date in which it was completed. For tenure-track faculty, you will have a mentoring timeline to follow as well.

At the **end of each month**, please scan and email the entire checklist to your AED and PL for review of your progress.

Please meet with the following individuals according to the established timelines included in the checklist:

Area Extension Director.....	Page 2
Program Leader.....	Page 8
Administrative Assistant.....	Page 11

The University of Maryland, College of Agriculture and Natural Resources programs are open to all and will not discriminate against anyone because of race, age, sex, color, sexual orientation, physical or mental disability, religion, ancestry, or national origin, marital status, genetic information, or political affiliation, or gender identity and expression.

## New Faculty Member Checklist for

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### **Area Extension Director will meet in-person**

#### **Day One**

*Date Completed*

- Explain orientation checklist and reporting procedures \_\_\_\_\_
- Provide office tour and introductions to co-workers \_\_\_\_\_
- Review and clarify job responsibilities based on position description \_\_\_\_\_
- Review the collaborative supervision system between the PL & AED \_\_\_\_\_
- Explain office procedures (including equipment, supplies, and materials) as well as office standards (including appropriate dress). \_\_\_\_\_
- Review Google Calendar expectations \_\_\_\_\_
- Discuss history of Extension, Mission, philosophy, etc. \_\_\_\_\_
- Discuss College of AGNR August orientation for new faculty members (2.5 day bus tour) \_\_\_\_\_

#### **Week One**

- Explain UME's structure and function
  - o [UME Website](#) \_\_\_\_\_
  - o [UME Plan of Organization](#) \_\_\_\_\_
  - o [UME Cluster Programming](#) \_\_\_\_\_
  - o Review [UME Organizational Charts](#) \_\_\_\_\_
  - o Discuss UME and cluster structure & initiatives. \_\_\_\_\_
  - o Review [UME Answers Website](#) \_\_\_\_\_
- Review [College of AGNR Faculty and Staff Page](#) \_\_\_\_\_
- Schedule [New Employee Orientation](#) on campus (optional) \_\_\_\_\_

- Explain Travel and Expense Statement (TES) Reimbursement Policy
  - [Request Access to ELF](#) \_\_\_\_\_
  - Explain biweekly entry of travel \_\_\_\_\_
  - Explain available county travel funds and provide KFS # \_\_\_\_\_
  - Review [Policies](#) \_\_\_\_\_
  - Review [ELF Help Sheet](#) \_\_\_\_\_
  - Discuss TAR & Group TAR \_\_\_\_\_
    - When it is required
    - Who should complete it (prior approval)
    - What to do after the TAR
  
- Explain Timesheet and Leave procedures
  - Explain biweekly entry of leave in [PHR](#) \_\_\_\_\_
  - Review payroll dates \_\_\_\_\_
  - Review work hour procedures (office hours, comp time, lunch, breaks) \_\_\_\_\_
  - [UMD Faculty Leave Policies](#) \_\_\_\_\_
  - UME Comp Time Policy \_\_\_\_\_
  - Review process for requesting leave and form \_\_\_\_\_
  - Discuss county holiday closures \_\_\_\_\_
  - Review out of office Gmail procedure when on leave or attending workshops and conferences \_\_\_\_\_
  
- Discuss staff meeting and Admin Monday expectations & populate dates on Google Calendar \_\_\_\_\_
  
- Set biweekly meeting dates w/AED for next 3 months on Google Calendar \_\_\_\_\_

**Month One**

*Date Completed*

- Set up cluster meeting (for the specific program area) in collaboration with Program Leader. \_\_\_\_\_
- Review UMD College of AGNR [Strategic Plan](#) \_\_\_\_\_
- Review [UME Strategic Plan](#) \_\_\_\_\_
- [Discuss UMD Policies](#) \_\_\_\_\_
- [Review UMD Faculty Handbook](#) \_\_\_\_\_
- [Review UMD Faculty Benefits](#) \_\_\_\_\_
- [Review ARES website \(ELF, payroll, etc.\)](#) \_\_\_\_\_
- [Review Administrative Services website](#) \_\_\_\_\_
- [Explain UME Forms](#) \_\_\_\_\_
- Train on Affirmative Action
  - Describe the Affirmative Action process and related record-keeping
    - [UME Compliance](#)
  - Show faculty member the Affirmative Action Central File and his/her program area section. Explain its' use \_\_\_\_\_
  - Discuss approaches for reaching diverse audiences and how to document the efforts for the AA file \_\_\_\_\_
  - [Explain Internal Compliance Review](#) (Every 3 years) \_\_\_\_\_
  - Review UME Sexual Harassment Guidelines and UMD Policy and Procedures on Sexual Harassment \_\_\_\_\_
- Explain [Extension Advisory Committee/Board](#) and its function, both fiscal & advisory. Populate upcoming meeting dates on Google Calendar \_\_\_\_\_
- Review ongoing/annual UME county events and expectations for faculty member involvement. \_\_\_\_\_
- Review expectations for county-based UME-Annual Reports \_\_\_\_\_
- Discuss various agencies to begin networking \_\_\_\_\_

*Date Completed*

- Orient faculty member to community and set up meetings with local collaborators \_\_\_\_\_
- Provide email subscription information for relevant county activities (e.g. news and alerts), as appropriate. \_\_\_\_\_
- Explain county government structure and expectations \_\_\_\_\_
- Discuss areas and opportunities for potential staff development during the year
  - Review [UHR training opportunities](#) \_\_\_\_\_
- Write bio/intro w/photo for local newspapers and UME Newslite. \_\_\_\_\_
- [Complete UMD online bio and add photo](#) \_\_\_\_\_

## **Month Two**

Reinforce all reporting procedures reviewed by PL last month:

- [Explain Faculty Reporting Expectations](#) \_\_\_\_\_
- Individual Extension Plan (IEP) (*Due Nov 15*)
  - Assist in developing program priorities within state identified priorities and cluster needs \_\_\_\_\_
  - Assist with development and implementation of one-year plan of action \_\_\_\_\_
  - Review IEP documents \_\_\_\_\_
  - Identify local needs and develop a draft IEP to submit to AED and PL before next month's meeting \_\_\_\_\_
- Teaching Effectiveness (Immediate submission to RED office)  
*Last annual submission due no later than Nov 15*
  - [Describe the teaching effectiveness forms](#)
  - [Teaching Effectiveness Form](#)
  - [Train-the-Trainer Form](#)
  - [Administrative/Peer Form](#)
- UMERS (*Due Dec 15*)
  - Explain [UMERS](#) and expectation of monthly entry \_\_\_\_\_
- Impact Statement (*Due Jan 15*) \_\_\_\_\_
- Curriculum Vitae (*Due Jan 15*) \_\_\_\_\_

- [Self-Evaluation process & form](#) (Due Jan 15) \_\_\_\_\_
- [Lyterati/Outside Professional Activities](#) (Due mid-Feb) \_\_\_\_\_
- Annual Faculty Review (AFR) (Conducted March-April) \_\_\_\_\_
  - Discuss the Annual Faculty Review Process including CV development, UMERS entry, impact statements, etc.

**Month Three**

- Review [UME marketing](#) \_\_\_\_\_
- Review the process for applying for grants \_\_\_\_\_
  - [Office of Research Administration](#) \_\_\_\_\_
  - [AgPAS](#) \_\_\_\_\_

AgPAS is AGNR's Pre-Award Services unit for all proposals going forward. If you intend to submit a proposal, please complete the No I webform. Once received, Contract Administrator will contact you to coordinate the process.
- Discuss IRB procedures and informed consent needs for evaluations \_\_\_\_\_
  - Complete [CITI Human Subjects Research](#) – Social and Behavioral Research training course (3 hours): \_\_\_\_\_
  - Provide Certificate of Completion to AED & PL  
Instructions for setting up an account can be found at:  
<http://citiprogram.desk.com/customer/portal/articles/163300-how-do-i-enroll-in-a-citi-course-for-the-first-time-> \_\_\_\_\_
  - Set monthly meeting dates w/AED for next 6 months on Google Calendar \_\_\_\_\_

## **Please remember to do the following:**

### **Biweekly**

- Meet w/AED for trainings and orientation for at least first 3 months
- Submit PHR time to AED for approval
- Submit travel to AED for approval

### **Monthly**

- Email Orientation checklist to AED & PL
- Email program updates to AED & PL
- Participate in Admin Mondays on 4<sup>th</sup> Monday at 9 am
- Attend county/cluster staff meetings
- Submit UMERS electronically
- Monitor AA compliance & update training log
- Participate in UME impact team meetings

**New Faculty Member Checklist for**

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**Program Leader**

**Day One- Call In**

*Date Completed*

- Welcome and provide an overview of position. \_\_\_\_\_
- Review the collaborative supervision system among the PL & AED \_\_\_\_\_
- Briefly describe statewide initiatives (including UME strategic plan, impact teams, action teams, signature programs, etc.) which relate to position. \_\_\_\_\_
- Make available a written summary of resources such as websites, webinars, etc. for the faculty member to review prior to the in-person meeting \_\_\_\_\_
- Make available program development resources as well as [IEP and CV templates and samples](#). \_\_\_\_\_
- Set in-person meeting for next month  
Date & Times \_\_\_\_\_

**Month One - In Person**

- Review basic program development process including community scans and asset mapping to determine needs to address. \_\_\_\_\_
- Review [Extension Programming Framework](#) \_\_\_\_\_
- Have an in-depth discussion of statewide initiatives (including UME strategic plan, impact teams, action teams, signature programs, etc.) \_\_\_\_\_

**Reporting Procedures**

- [Explain Faculty Reporting Expectations](#) \_\_\_\_\_
- Individual Extension Plan (IEP) (*Due Nov 15*)
  - Assist in developing program priorities within state identified priorities and cluster needs \_\_\_\_\_
  - Assist with development and implementation of one-year plan of action \_\_\_\_\_
  - Review IEP documents \_\_\_\_\_
  - Identify local needs and develop a draft IEP to submit to AED and PL before next month's meeting \_\_\_\_\_



- Teaching Effectiveness (Immediate submission to RED office)  
*Last annual submission due no later than Nov 15*
  - [Describe the teaching effectiveness forms](#)
  - [Teaching Effectiveness Form](#)
  - [Train-the-Trainer Form](#)
  - [Administrative/Peer Form](#)

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- UMERS (*Due Dec 15*)
  - Explain [UMERS](#) and expectation of monthly entry

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- Impact Statement (*Due Jan 15*)

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- Curriculum Vitae (*Due Jan 15*)

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- [Self-Evaluation process & form](#) (*Due Jan 15*)

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- [Lyterati/Outside Professional Activities](#)  
(*Due mid-Feb*)

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- Annual Faculty Review (AFR) (*Conducted March-April*)
  - Discuss the Annual Faculty Review Process including CV development, UMERS entry, impact statements, etc.

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- Discuss P & T process (*tenure-track faculty*).
  - [Policy](#)

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  - [Helpful Documents](#)

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  - [Criteria](#)

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  - View [Recorded training](#)

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- Review mentoring process & begin brainstorming potential experiential and programmatic mentors

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- Discuss areas and opportunities for potential professional development during the year, and available state funding.

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- Explain purposes, format and responsibilities of annual statewide training conferences including: Workshops, conferences, and regional trainings

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- Set next month's call  
Date & Time \_\_\_\_\_

**Month Two- Call In**

*Date Completed*

- Discuss and provide feedback on draft IEP. \_\_\_\_\_
- Identify an experiential mentor and a programmatic mentor. \_\_\_\_\_
- Review the affirmative action process and discuss approaches for reaching diverse audiences. \_\_\_\_\_
- Facilitate site visits with faculty members during orientation period (e.g. provide contact information to programs in other counties)
  - Explain purpose of site visits \_\_\_\_\_
  - Record site visits on assignment page \_\_\_\_\_
- Set next month's call  
Date & Time \_\_\_\_\_

**Month Three- Call In**

- Review Reporting Procedures and P & T process \_\_\_\_\_
- Review Mentoring Progress w/identified mentor \_\_\_\_\_
- Review the process for applying for grants
  - [Office of Research Administration](#) \_\_\_\_\_
  - [AgPAS](#) \_\_\_\_\_  
AgPAS is AGNR's Pre-Award Services unit for all proposals going forward. If you intend to submit a proposal, please complete the NoI webform. Once received, Contract Administrator will contact you to coordinate the process.
- Discuss IRB procedures and informed consent needs for evaluations
  - Complete [CITI Human Subjects Research](#) – Social and Behavioral Research training course (3 hours) \_\_\_\_\_
  - Provide Certificate of Completion to AED & PL  
[Instructions for setting up an account](#) \_\_\_\_\_
- Set next month's call  
Date & Time \_\_\_\_\_

**Assistant Director, Evaluation & Assessment will meet in-person/Connect**

- [Extension Programming Framework](#) \_\_\_\_\_
- [Discuss Evaluation Resources](#) \_\_\_\_\_
- Review Teaching Effectiveness \_\_\_\_\_
- [Discuss Institutional Review Board](#)
  - [Human Subjects Training](#) \_\_\_\_\_

**Administrative Assistant**

**Day One**

- |  | <i>Date Completed</i> |
|--|-----------------------|
| <input type="checkbox"/> Set up <a href="#">UMD Email Account</a> and provide guidance on setting up email in Gmail  | _____                 |
| <input type="checkbox"/> Review courses on Lynda.com<br>(1-5 hours - UMD login required)   | _____                 |
| <input type="checkbox"/> <a href="#">Gmail Training</a>  | _____                 |
| <input type="checkbox"/> Provide office tour and introductions to co-workers.  | _____                 |
| <input type="checkbox"/> Explain office procedures (including equipment, supplies, and materials) as well as office standards (including appropriate dress). | _____                 |
| <input type="checkbox"/> Review Microsoft Google Calendar usage  | _____                 |

**Week One**

- Assist with setting up and accessing various computer programs \_\_\_\_\_
- [Apply for ELF access](#) and reinforce expense statement policies. \_\_\_\_\_
- Update email address to user ID “@g.umd.edu” in ARES Personal Info \_\_\_\_\_

- Apply for access to UMERS \_\_\_\_\_
- Secure needed office supplies and equipment. \_\_\_\_\_
- Assign a code for the copy machine and demonstrate its' use \_\_\_\_\_
- Provide letterhead, fax, note, etc. templates \_\_\_\_\_
- Order/Print Business cards \_\_\_\_\_
- Order Name tag & shirt from ADO office \_\_\_\_\_
- [Update AGNR directory](#) \_\_\_\_\_
- Request that email address be added to program  
listserv & other appropriate listserves \_\_\_\_\_
- Provide details on getting a University ID card \_\_\_\_\_
  - o Faculty member obtains ID \_\_\_\_\_
- Review support staff responsibilities and procedures (preparing  
documents, affirmative action, program preparation, filing, etc.) \_\_\_\_\_
- Review interoffice communications procedures  
(incoming & outgoing mail, review of documents before  
distribution, informing office changes to schedule, etc.) \_\_\_\_\_
- Explain existing client and grassroots' mailing lists \_\_\_\_\_

**Month One**

- Explain programmatic budget process, EAC/EAB, Pcards, Tcards, etc. \_\_\_\_\_
- Reinforce the Affirmative Action process and provide  
electronic copies of the AA statement, special assistance  
statement, official UME logos, and training log \_\_\_\_\_

**New Faculty member Checklist for** \_\_\_\_\_

Faculty members must sign, date and email a copy of the checklist to the AED and PL **monthly**.

**Faculty member Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Faculty member Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Faculty member Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Faculty member Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**SITE VISITS**

**New faculty member: write site visit locations and dates**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_