# All Aboard the Crazy Train

## *Onboarding & Offboarding of Conservation District Employees*



# WHY DID WE TAKE THIS JOURNEY?

The lack of procedures was driving us all CRAZY!

*State Agency Staff*

*Area Coordinators*

*District Directors*

*Newly Hired Employees*

*Exiting Employees*

# Stops Along the Way

01 Basic Agency Checklist

02 Added District Specific Items

03 Included Broad Topics & Tasks

04 Left Room for Notes

05 Hyperlinks to Information

06 Updated as Needed



# ONBOARDING CHECKLIST

*Vacancy Volume*

*Efficiency/Productivity*

*Ease of Use*

*Consistency/Continuity*

*Sets a Positive Tone*

*Firm Expectations*

*Builds Confidence*

*Clear Documentation*

*Checklists make weirdos like us happy!*

# BASIC INFORMATION

- Employee
- District

# PHASES & TASKS

- Hiring
- Onboarding
- Training

## DISTRICT EMPLOYEE ONBOARDING & TRAINING

EMPLOYEE NAME
DISTRICT NAME
POSITION & STARTING SALARY
START DATE

| TASK | COMPLETED BY | DATE |
|---|---|---|
| **HIRING** | | |
| Permission to Fill letter from OCC is received by the District establishing: start date, job title, and salary rate | | |
| District Board takes action on:<br>• advertisement of position<br>• applicant selection process<br>• board meeting or interview committee<br>• establishing interview date/time | | |
| Interviews held, new hire selected, employment offer made (initial offer can be verbal, but written offer must be sent via mail or email that includes: starting date, salary, benefits, performance review timeline, timeframe and mode for acceptance) | | |
| Offer Letter signed by candidate and returned to ADC within 7 days (email is acceptable) | | |
| **ONBOARDING** | | |
| Signed Offer Letter and Resume sent to OCC-District Services (with updated contact info if necessary) | | |
| Personnel File started at the District office | | |
| District Services sends welcome e-mail w/ forms to new hire, district and ADC are cc'ed | | |
| ADC reaches out (e-mail or call) to the new hire to establish a plan for first day of work; discusses dress code and any questions the new hire has that need to be addressed prior to starting work | | |
| OCC sends email access instructions | | |
| Office tour/co-worker introductions | | |
| Office safety- evacuation routes, tornado plans, location of first aid supplies, etc. | | |

ADC Use 2024.06

| | | |
|---|---|---|
| 1st Month's Payroll completed (actual hours unless start date was the first working day of the month)<br>*no benefits or retirement deductions in more cases* | | |
| COB generated and provided to District by OCC | | |
| Preclaim competed with benefits information included (2nd month of employment in most cases) | | |
| Timesheet with full leave (if applicable) completed (2nd month of employment in most cases) | | |
| Payroll with benefits included completed (2nd month of employment in most cases) | | |
| Handbook Acknowledgement Form completed | | |
| Notary application/Information | | |
| **TRAINING - General** | | |
| Office 365/e-mail (including district vs. firstname.lastname account usage)/TEAMS features, including chat, meetings, training recording (TEAMS-district employees-meetings-files-recordings) | | |
| Payroll Process<br>• Timesheet (leave accruals, LWoP, etc.)<br>• Payroll Worksheet<br>• Accounting software (if applicable)<br>• Quarterly tax reconciliation form | | |
| OCC allocations, allocation register, and claims (claim form, item codes, claim checklist) | | |
| Board meetings<br>• Regular Meeting Schedule (Form 4A)<br>• Changing or adding a meeting (Form 4B)<br>• Agenda<br>• Minutes<br>• Executive session<br>• Pre-meeting information sent to directors<br>• Board meeting packets/books (including minutes, financials, time records, and other items on the agenda)<br>• Director Attendance Roster<br>• District Minutes Submission Checklist | | |
| Watershed Operation & Maintenance | | |
| Land legals and plat map reading | | |

ADC Use 2024.06

# TRAINING

- General
- Taxes
- Educational Resources

| TRAINING – Education Resources | | |
|---|---|---|
| Oklahoma Conservation Commission website<br>(particularly employee resources page, guidance & training page, forms, send To list, important district items, 10-minute-guide series Calendar of Yearly Work | | |
| History and the Conservation District Act | | |
| OCC divisions | | |
| Conservation District Handbook | | |
| Employees Team and recordings of previous trainings | | |
| OCC YouTube and social media | | |
| NOTES: | | |

# OFFBOARDING CHECKLIST

Smoother Process

Transfer of Assets & Knowledge

Reduces Security Risk

Establish Interim Work Processes

Clean Break, Firm End & Closure

Final Documentation for File

# BASIC INFORMATION
# TASKS
# COMPLETION DATES
# NOTES

## DISTRICT EMPLOYEE OFFBOARDING

EMPLOYEE NAME |
DISTRICT NAME |
POSITION & ENDING SALARY |
DEPARTURE DATE |

| TASK | COMPLETED BY | DATE COMPLETED |
|---|---|---|
| Resignation letter provided to board/OCC or retirement date confirmed | | |
| Watershed documents are up-to-date, status of any bids, projects, or claims has been discussed and communicated with the Conservation Programs Division | | |
| District Files are up-to-date & organized/arranged in an easy to locate and use manner; electronic files have been saved to a location others have access to; location and passwords have been provided | | |
| District minutes are up-to-date and submitted to OCC; location of printed and electronic minute records has been provided | | |
| Cost share allocation reports are up-to-date, status of any pending projects or claims has been communicated | | |
| All tax accounts are current; all payments and reports have been submitted; logins and passwords have been provided; and each account is functional | | |
| Location of W4s and W9s and list of W2/1099 recipients has been provided | | |
| Social media accounts have been addressed and administration has been updated (should already have a board member in addition to the employee) | | |

| TASK | COMPLETED BY | DATE COMPLETED |
|---|---|---|
| OCC 6B Form Notice of Personnel Action form has been completed & signed by the employee | | |
| Final 6B form has been approved by the board of directors and submitted to the OCC | | |
| NOTES: | | |

# WHERE ARE WE NOW?

- ✓ *Implemented Statewide*
- ✓ *Template is a Living Document*
- ✓ *Completed Forms are Retained*
- ✓ *Digital Reference Source*
- ✓ *Continue to Question our Sanity Occasionally*

**FINAL DESTINATION:** *Training Manual*

Questions?

# THANK YOU



