

BEST PRACTICES FOR YOUR CONSERVATION DISTRICT TO AID IN STAFF TRANSITION

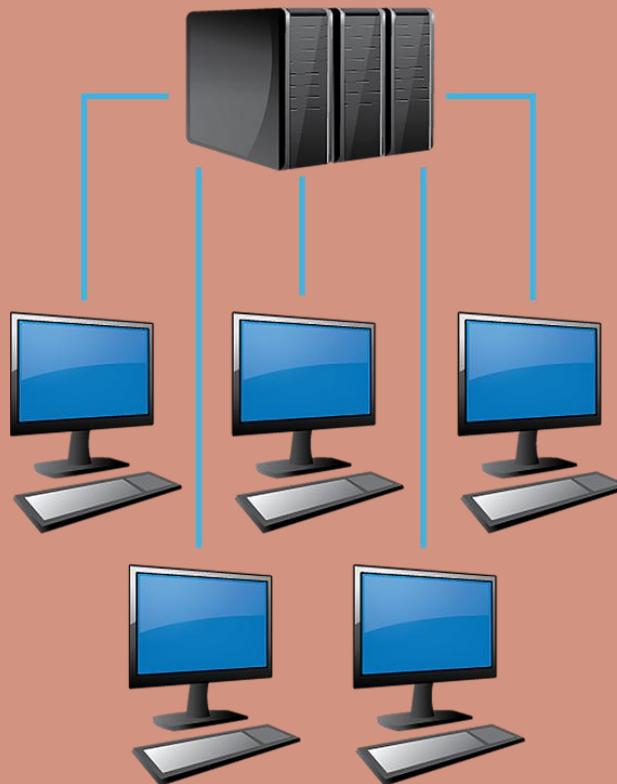


PREPARING FOR CD TRANSITIONS

- Why?
 - Staff turnover statewide
 - Loss of continuity within CD programs and activities
 - Loss of critical historical information
 - Missing deadlines



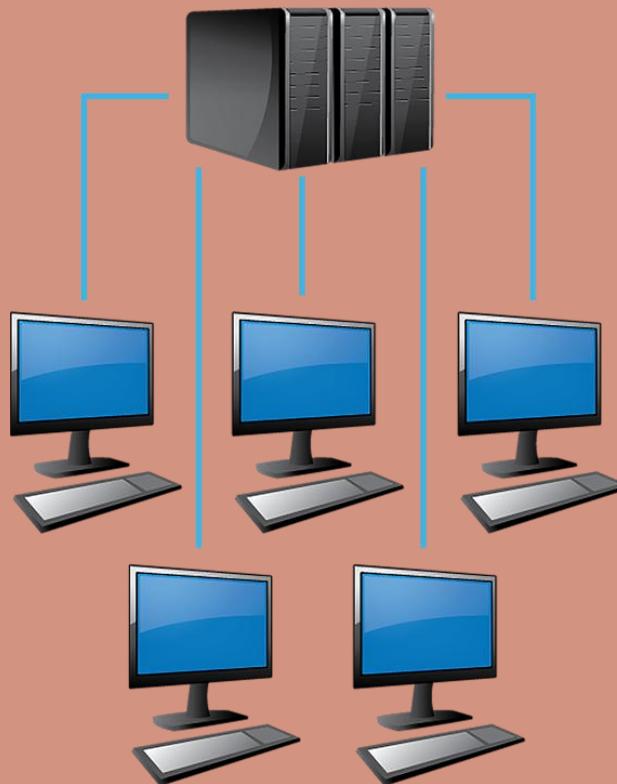
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Access to System for New CD Employees

- LincPass
- Background Check
- SAAR
- ~~30 Day LincPass Exemptions~~
- Windows Hello for Business & Job Aid

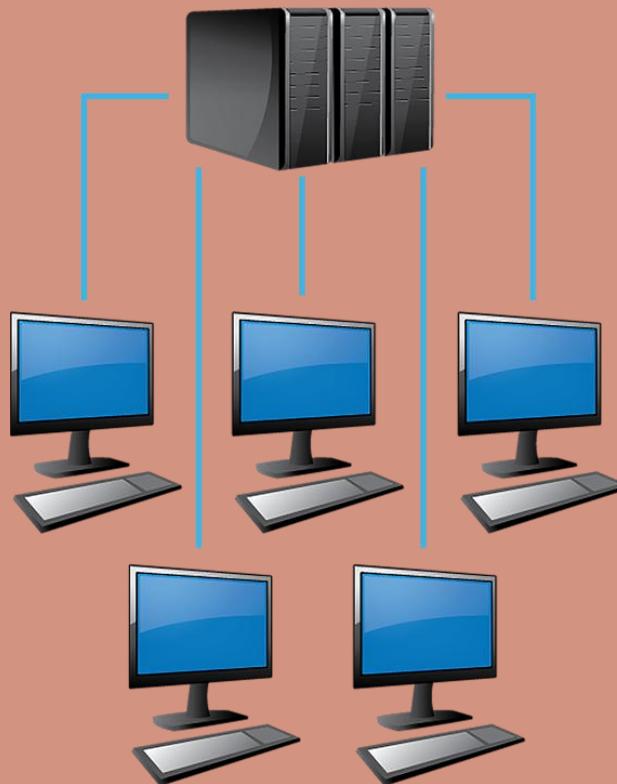
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Data Storage Concerns

- OneDrive
- Shared Drives
- Teams Shared Drive
- PED
- Cloud Storage

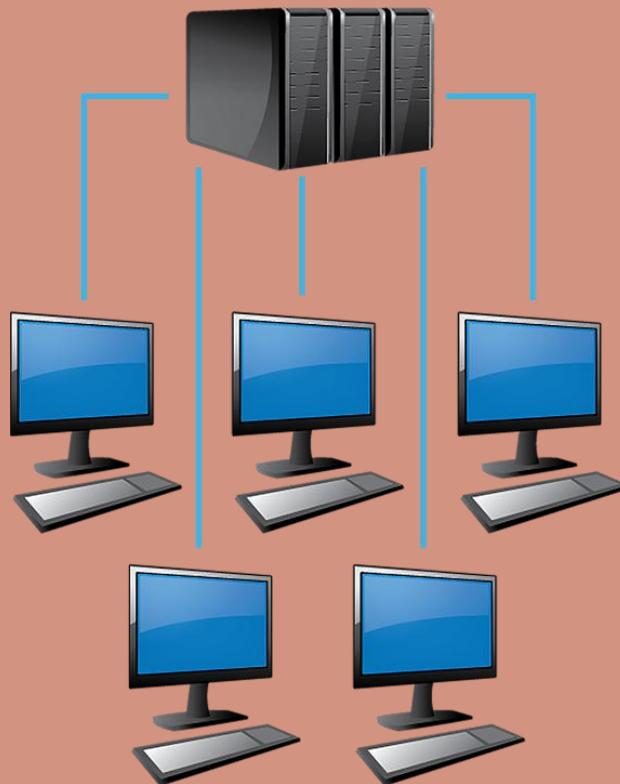
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Other Concerns

- Data Retrieval
- Email
- Employee Transition
- Old Computer Systems
- Government shutdowns or other situations that lock you out

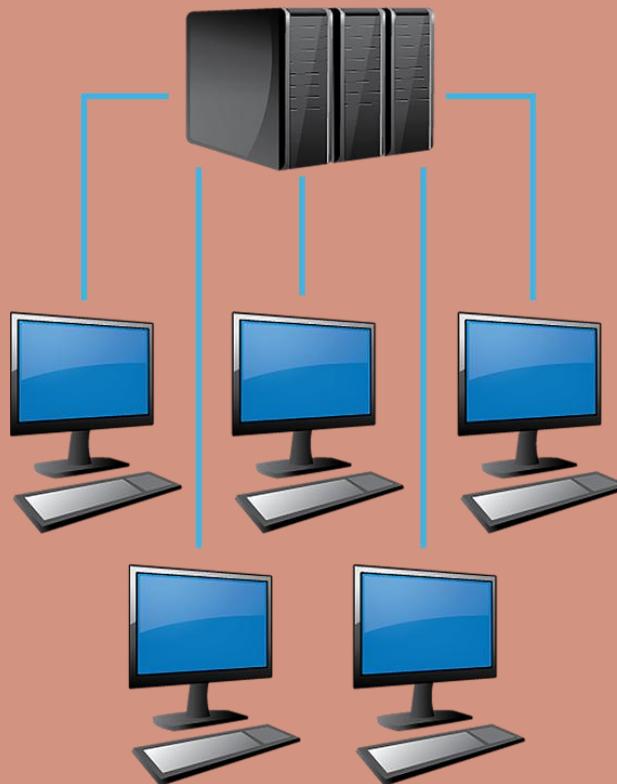
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PERKS

- Free for CD to use
- Cost for computer itself
- Software Center
- If laptop-portability *

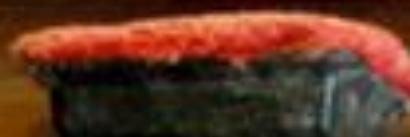
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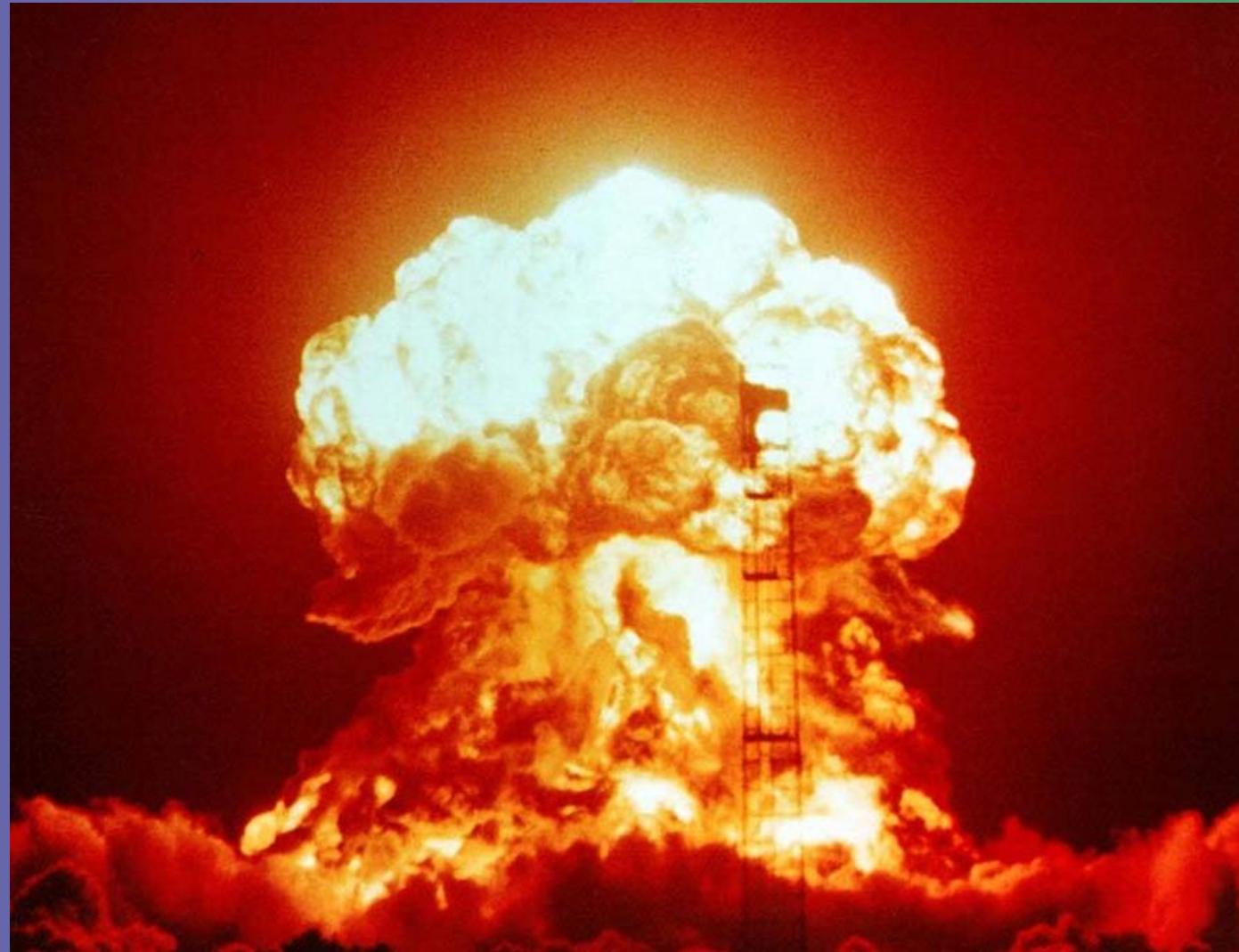
NEEDS IDENTIFIED

- Consistent onboarding to computer network by NRCS
- Plan for Data Transition
 - Email
 - Contacts
 - Historical records
 - Internet links

Any questions?



EVERYTHING ELSE



LOGINS & PASSWORDS



- Keep a list
- Share location of list with at least one supervisor
- Write down security questions and answers with your password list for transition purposes

DUAL AUTHENTICATION ISSUES

- Sam.gov
- MailChimp
- Google
- Others???



Where is your personal phone number stored for CD business?

CD SPECIFIC DATES

- Monthly Duties/Governance Calendar
- Department of Administration Report (AFR)
- Quarterly Reports
- Payroll
- MPERA reporting
- Password update requirements
- Permissive Mill Levy hearing/paperwork
- Budget to County
- Approved minutes
- MACD Resolutions



CD SPECIFIC DATES, CONTINUED

- Area Reports for Meetings
- Supervisor Elections
- Swearing in Supervisors
- Officer changes
- Grant Reports
- Meeting Agendas
- Etc.



“MAP” OF OFFICE, FILES AND STORAGE



- Where are the CD Files and other inventory Stored?
 - Hard copies
 - Electronic
- Is there more storage than just the office? Shed? Offsite storage?

BANK ACCOUNTS/OTHER FINANCIAL INSTITUTIONS



- Keep all bank account/investment account information together
- Preferably keep all bank accounts/investment accounts at the same institution

FINANCIAL SOFTWARE

- Change the user information before you leave
- Intuit is a separate account from QuickBooks-keep track of it too!
- Payout of Annual and Sick Leave-Personnel Policy
- Back up the company



BEFORE THE ADMIN LEAVES

Back up your work

- CD files
- CD Calendar
- CD Emails
- Internet bookmarks
- Financial software



BEFORE THE ADMIN LEAVES

- Keys
 - Office
 - File cabinet(s)
 - Offsite storage
 - Any others
- Change Voicemail
- Update inventory
- CD Credit or Debit Card?



BEFORE THE ADMIN LEAVES

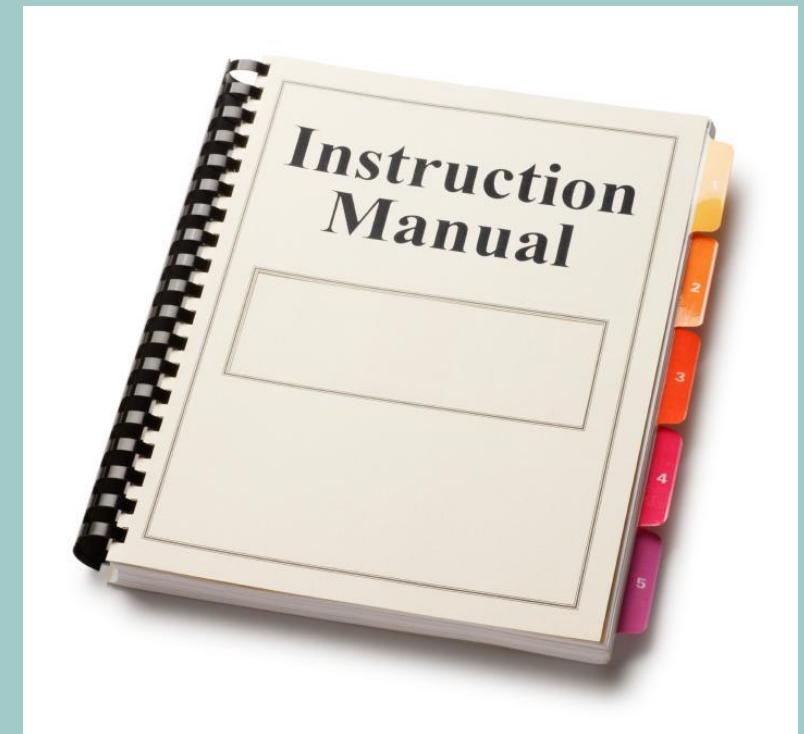
Leave a Procedures
Book/List

How does YOUR CD do
things???



PROCEDURES MANUAL

- Electronic procedures list/instructions
- Hard copy manual for your office



IF NO OVERLAP:

Leave a copy of:

- The New Employee Guide
- Link to EO's handbook
- Orientation list
- Let your EO Directors & CDB Person know that you're leaving

Contact information for:

- Area Directors
- CDB Specialist
- MACD



EXIT INTERVIEWS

- The good
- The bad
- The ugly?



ANY QUESTIONS?

