

Executive On Boarding

Executive Assistant:
Prepare Work Essentials:
<input type="checkbox"/> Gabe Moreno (914-773-3549) will be the point of contact for questions concerning technical issues.
<input type="checkbox"/> Assign a phone extension and ensure voice mail set up.
<input type="checkbox"/> Contact ITS Help Desk (https://help.pace.edu/helpdesk/WebObjects/Helpdesk.woa): (before 1 st day or on first day) <ul style="list-style-type: none">○ Ensure Executive's computer is wiped clean○ Map Network Drive ○ Map printer○ Ensure all needed software is loaded and configured
<input type="checkbox"/> Notify Security (NY x11800; Westchester x33605) about access on first day – assist in acquiring Pace ID and gaining access to Frankfort lot.
<input type="checkbox"/> Order office supplies, keys, name plate, business cards, and corporate phone or credit cards
<input type="checkbox"/> Order a Blackberry or Smartphone place a service request at https://help.pace.edu/helpdesk/WebObjects/Helpdesk.woa . (For inquiries please contact Maureen Doddy, 914-923-2692)
<input type="checkbox"/> Ensure announcement is being prepared to go out to University Community
<input type="checkbox"/> Gather vital reference materials for transition notebook : (Office of VP of HR to give you a template and direction) <ul style="list-style-type: none">○ Staff Directory of entire Division (by department) with names and phone numbers○ Voice mail instructions○ Phone extension instructions (add "3" to last for digits of PLV phone number to dial to another campus; add "4" for WP; add "2" for Valhalla; and "1" for NY).○ Organizational chart for Division (with titles)○ Current list of staff addresses/telephone numbers for emergency use○ Job Descriptions of all in Division○ Division and Department goals for current year and status○ Administrative Responsibilities – Board Committees; Advisory Committees; Councils, etc.
<input type="checkbox"/> Gather other important materials: <ul style="list-style-type: none">○ Current Emergency Action Plan for Division○ Pace Annual report and related marketing materials
Schedule Training and Meetings
<input type="checkbox"/> Arrange one-on-one training with User Services (extension 11737) or register for training at (http://www.pace.edu/information-technology-services/getting-help/it-training for: Overview of Pace Systems; Blackberry/Smartphone/iPad; Outlook; how to set up VPN; Portal
<input type="checkbox"/> Arrange Executive Finance training with Financial Services (Shuana Thompson, x22751) for overview and training on Chart of Accounts; Finance Budget Management; Financial Reporting; Kronos; Financial forms; Capital Assets; RFPs; Contracts.
<input type="checkbox"/> Contact Cindy Heilberger (x11098) to arrange basic orientation about the Board of Trustees and Board committee structure, including any committee(s) that the executive may be required to staff.

<input type="checkbox"/> Arrange a meeting with your organization's Budget Director (or with the Budget and Planning Office) for a budget overview and strategic conversation.
<input type="checkbox"/> Contact Provost's office to arrange a meeting about the Faculty Councils; Deans Councils, etc.
<input type="checkbox"/> Arrange for training on PeopleAdmin with Talent Acquisition (x22771)
<input type="checkbox"/> Arrange overview of Performance Management and Development Process with the Director of Talent Development (x22746). S/He also will discuss overview of Pace's Professional and Management training curriculum and the Institute of Management Studies workshop opportunities.
<input type="checkbox"/> Schedule meetings with direct reports during first week, if possible.
<input type="checkbox"/> Schedule meetings with Operations Committee members and key stakeholders, during 2 nd or 3 rd week
<input type="checkbox"/> Confirm schedule for meetings with the President – contact the President's Office at x 11098