

**Words of Wisdom from Middle Managers....
....for Middle Managers**

A Publication of the Southern Region Middle Managers

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Introduction

Being an Extension District Director, or middle manager, has often been described as the most difficult job in the organization. Extension middle managers are often charged with supervising a large number of employees with diverse personalities that are dispersed over a broad geographic region. Extension middle managers maintain partnerships with numerous local government entities, and work to maintain positive stakeholder relationships as well. Managing complex, cyclical budgets are part of the job, as is hiring, training, and evaluating employees. These challenges and opportunities require middle managers to be strong yet compassionate leaders, motivators, facilitators, and negotiators, among many other talents.

Recognizing the importance of knowledge sharing and mutual support, *Words of Wisdom from Middle Managers...for Middle Managers* is a project that the Southern Region Middle Managers undertook as part of their Plan of Work for 2011 - 2012. A committee was charged with developing this resource during the Middle Manager's Committee sessions at the 2011 Southern Region Program Leadership Network Meeting in Fort Worth, Texas. Committee members developed nine open-ended questions, as follows:

- Please share your thoughts regarding successful hiring practices.
- How about words of wisdom regarding new agent training?
- Any recommendations that will help other Middle Managers conduct successful performance appraisals are welcome.
- Please share your tips for remote supervision of faculty here.
- Stakeholder relationships (i.e., local government, partner agencies, trade organizations, state government, etc.) are critical. What thoughts do you have for maintaining strong stakeholder relationships?
- Please share best practices in leadership. In other words, what can a Middle Manager do to be viewed as a strong leader?
- Please share words of wisdom for successful financial management.
- Have you learned lessons about marketing Extension from the Middle Management position? If so, please share your observations.
- If you have other pieces of advice that do not fall into one of the above categories, please share your thoughts in this section.

Questions were routed to all Southern Region Middle Managers for input, with 14 responses received by the end of June 2012. Responses were organized by topic and compiled with minor editing to correct typographical errors and reduce duplicate information. The resulting draft publication was peer reviewed by Middle Management Program Committee members during the August 2012 PLN Meeting in Orlando, FL and reflects their input. The survey questions were also re-distributed to the Southern Region Middle Managers listserv, with an additional 13 middle managers responding. Overall, approximately 40% of Southern Region Middle Managers provided input on the survey.

In summary, whether you are a new or experienced middle manager, there is something we can all learn from each other. It is our hope that the following pages provide some useful tips, or serve to reinforce your current thinking.

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Successful Hiring Practices

Recruiting

Form a search committee with competent members.

It is important to determine what skill set(s) are required to fill and accomplish the responsibilities of the desired position.

Prepare a position announcement that is vetted by the locality and university that clearly explains expectations. Get maximum exposure for the announcement.

Actively recruit applicants. Always be on the looking for individuals that would make excellent Extension agents, and when the opportunity arises, encourage them to apply for positions.

There are ways to ensure success at hiring the right person for a job. An up-to-date job description should be in place that uses general terms to convey the type of person for the job.

Getting out and letting potential applicants know about your vacancy is an important step. Often the job is advertised via online process without the footwork/networking to get it out to a wider applicant pool.

Advertise in the *Journal of Extension*, particularly now that other Extension Services are downsizing!

Hiring is always tricky. Identifying people who have long term aspirations for the position is crucial. A lot of time and effort can be wasted in the development of employees that are not motivated to grow into an Extension position. Identifying candidates that are committed up front is both rare and all important.

Using online resources and considering current customers that we would like to have on our team, or people we know at other companies in the same business looking for something new. Another great way to find candidates is asking friends and employees for referrals. Also, advertising in the business journals or local newspapers.

Market the position announcements through all available venues, especially electronic based media.

Advertise in the local paper to keep the locality in the loop.

It would be nice to have a strong recruitment team for on campus Job Fairs.

Second or third career candidates that have learned what they want out of life, and that happiness is not always directly proportional to the size of a paycheck, have turned into good long term employees for us...as long as they are trainable!

Do not be afraid to re-advertise if need be.

Interviewing

Hire on what you see and hear not what you want to see and hear.

Make sure the individual is aware of the roles and responsibilities of an extension educator.

Have an informative discussion. When inviting applicants to the interview, build in time for them to ask questions also. Briefly discuss the position. This will allow the applicant to better determine continued interest.

Make sure the interview isn't with just one person. Involving a few other employees to get more perspectives and aggregate their feedback is an excellent practice.

Virginia conducts a two stage process with a preliminary telephone interview attended by the Associate Director, Director of Human Resources, and District Director, and then a local interview panel with the District Director, Unit Coordinator, local government representative, Extension client, and an Extension agent. This process has usually resulted in only bringing the best candidates to the local interview and selecting the most qualified applicant for the position.

Conduct two rounds of interviews, the first with a committee and the second by middle manager and regional coordinator.

Look for candidates that demonstrate the "Extension gene." In other words look for candidates that have a passion for helping others succeed. Even with new graduates, this attitude can present itself in volunteer work.

Good screening processes on campus!

Involve all applicable parties in the hiring process (Extension Dean, Program leader, District Director, County Extension Director, local government, stakeholders).

When hiring we should always take action and ask challenging questions and take note on how the candidate develops his or her solutions.

An Extension agent is not a run-of-the-mill position. As a result, asking run-of-the-mill questions will not give you the insight into candidates that you need, and will not separate candidates that are very close. Ask fair but challenging questions that allow candidates to get at both the philosophical and technical aspects of the position.

In Kentucky we currently meet with the county councils where the vacancy exists and gather their input as to what they desire in programming and characteristics of the new agent. This gives them some voice in the process. However, we are currently exploring giving them more voice at the local level by including council reps during the interview stage.

Revise your questions with each interview as needed to reflect differences in agent positions, and the type of person you are looking for to fill each position.

In the interview, provide candidates with an opportunity to ask their own questions. Be honest with your responses.

Tell interview candidates that they will be expected to give a short presentation during their interview on a topic chosen by you.

Give applicants a clear picture of time commitment, etc. If there are funders associated with the position, please be sure to be apprised of requirements and determine when to share. For example, some county governments required drug testing, etc. This should be shared early on.

Buy-in from clientele, if necessary, can be achieved by involving them in the interview process.

Knowing how to interview is important. Many interviewers do not have a planned, thought out interview schedule and often lead candidates in how they want the question answered.

Select for those "essential" competencies. A solid extension professional with proper basic values can be trained in subject matter.

Reference Checking

Talk with previous employers and be honest.

Hiring is the most important responsibility I have as a middle manager. Taking the time to check and recheck references, past work history, etc. is so important.

Thoroughly check references. Use a phone interview in addition to a written list of questions for references to respond to, or request a letter of recommendation.

Use reference forms asking their opinions about several qualifications of candidate. Use the telephone to follow-up with references if flags or questions are raised on the submitted forms. Call previous employers.

If input is collected, use it in making the decision. This implies staff, colleagues and those who were solicited. This adds value to the selection process.

Making an Offer

Do not settle for mediocrity. It is best to have an open position than one that will bring future issues.

Being an advocate for your employees begins with the offer. Do not low ball candidates. Be their advocate when negotiating the salary with HR, and make the best offer to the candidate that circumstances will allow.

Do not leave money on the table when hiring.

Hire the best candidate with both the social and technical skills to do the job.

NEVER fill a position with a non-qualified individual.

Employ the best faculty and start salaries as high as you can.

Be patient and wait for the best fit to come along. It isn't wise to just fill a position for the sake of having it done. A good applicant may not be the best fit for a particular county. Every county has its own personality.

Concluding Thoughts

Have a set process for hiring.

Have clear expectations for position success.

After you hire a few people your gut feeling on future hires is usually your best.

Cut your losses with hires that do not work out.

Making good hiring decisions is the most important responsibility of a middle manager. The hiring decision will either make your job much easier, or very difficult!

New Extension Agent Training

In General

Be involved with your new faculty.

Once we have found the person whom we think is the best fit for our organization and for a position, we must be sure to provide proper training to expedite the new hire's learning period. The more a new employee knows in a shorter time, the sooner he or she can make valuable contributions to the organization.

Balancing the training new agents with the pressures of the community on a new agent is important. It is best to do as much training as possible in the first six months of employment.

New Agent Training should focus on the success of the new employee. It should be continuous (not just after hire).

Insure that a Unit orientation takes place as part of the process. For example, conduct a welcome event at the local level providing a dedicated time period for clients and stakeholders to come meet the new agent.

Introduce the new agent to the Board of Supervisors or City Council at the first meeting following the agent's hire date.

Time the newspaper advertisement announcing the new agent according to the agent's maturity level and learning curve. In other words, if the agent needs time to get up to speed, delay the article for a few weeks if possible.

Not everyone has a teaching background, so provide insight in this area.

Be honest when reviewing training.

New agent training should focus on practical application and tools for success. Avoid long, theoretical, mind-numbing training sessions. Support hands on training and avoid another "Power Point." Some systems have agents apprentice a few months before actually starting the job.

Get new agents trained as soon as possible so they will be successful. Most new agents are not in the organization for the long haul, thus we need to get the most out of them for the 4-7 years average they stay with us.

A more systemic orientation system may benefit new employees. Training should be broken down by category and spread over a number of weeks allowing for in-depth review and practice of specific procedures.

Don't overwhelm new agents. Experienced agents and middle managers should help create the agenda and be involved as teachers to insure that practical experiences are shared and the training is not solely based on book-learned state faculty.

It should be a well-planned, systematic approach along with informal learning via those in surrounding counties in similar counties. Be careful not to overwhelm them with too much training the first year. There is something to be said for getting out in the field and experiencing the job.

We conduct quarterly agent trainings for 4-H and FCS faculty within the region. I feel this is a good model to get the new hire engaged with their peers as well as begin to incorporate institutional goals and expectations early on. ANR agent training is more ad hoc but middle manager can drive this through working closely with specialists and research counterparts to provide high quality, needed agent training in a more purposeful manner.

Define what the desired outcome for the agents. Line up qualified specialist/researchers to accomplish the tasks. Evaluations of agent performance should be made several months later to assess the effectiveness of the training.

Regardless of what training system is used, in my opinion the success of a new agent ultimately depends on his or her intrinsic motivation, the support he/she gets from fellow agents, and the support of the community.

Allow the new agent time to get the lay of the land, and then provide their own input on what training opportunities will help them better address clientele needs.

Build in programming, evaluation, and orientation to the organization in the process.

New agents like to hear from other agents. Therefore, we have moved away from lots of

"administrators" and incorporated more agents into the process.

Do not overwhelm new professionals at the outset.

Basic mechanics to do the job are more critical than subject matter in most cases.

Really spend time instructing new agents on working with support staff.

Approach the critical things first.

New agent training is very challenging when the audience is so diverse in terms of their educational and work background and the subject matter areas they will be working in. Make sure new employees understand the work culture and what is expected of them. Understanding that their success depends greatly on their intrinsic motivation and self-direction is key.

Develop a handbook for new agents to follow the progress of training and networking from the first week to the end of first year. See http://pdec.ifas.ufl.edu/new_faculty/guidebook.pdf for an example.

Require new hires to successfully complete a graduate level Principles of Extension Education course as soon as possible.

Follow up, follow through, and stay on a course.

Mentoring, in Particular

Assign good mentors; not all faculty can do this.

A mentoring relationship is a win-win for all parties: the employee who seeks a mentor, the mentor, and organizations that employ the mentoring pair. Mentoring is also a powerful form of job training and can contribute experience, skills, and wisdom to a mentored employee to increase and expand employee development. Mentoring, whether with the boss or another experienced employee, is an excellent way to train and develop employees within the organization.

If the mentor assumes that the new agent will call when he/she has a question, and the new agent "does not want to bother" the mentor, then they won't speak and the mentoring partnership will fail. Assign more than one mentor if possible to increase the odds that the new agent will develop a relationship with one of the mentors. This is also an opportunity to fill in gaps in the new agent's training and expertise with mentors that are strong in those areas.

Partnering new agents with a "mentor" agent has proven to be successful. A training team of senior agents has also been established to conduct district wide new agent training. Mentor agents are also welcome to attend these trainings with the new agent. It has created a team of resource agents for our new faculty.

Establish a timeline for completion of necessary items and trainings.

The results of the mentoring process are only as good as the mentor agents themselves and the time that they invest in the new employee. During a time when we had the ability to hire District Program

Leaders, the training component was much more successful and is a good model for states that can afford it.

Performance Appraisals

Maintain “professional” relationships with agents/educators.

Be honest, consistent and complete.

Give suggestions for success along with issues.

Be timely, they are working on the next year.

Use your local county leader / County Extension Director; they are there every day.

Reward and support teamwork

Using the right tool is critical. A good tool is comprehensive enough to cover the roles and expectations of an educator, but not so complex that it takes too much time to complete. The instrument you use will determine to a large extent the outcome. An open ended instrument can lead to an open ended outcome.

Successful performance appraisals are tied to the definition of success as a county faculty. For me, of course, success is measured in terms of impacts -- but also in terms of the agents' own career management.

Standardized forms help.

I prefer to view "appraisals" as "state of the program discussion."

Prepare written notes prior to the meeting. Allow the agent to tell you his/her successes and failures in person at a one-on-one meeting. Follow up with clear written recommendations to overcome challenges and provide recognition for successes. It helps tremendously if you have had multiple opportunities to interact with the agent throughout the year.

Remain detached.

Offer constructive criticism.

Utilize the "Performance Appraisal Phrase Book" by Sandler and Keefe for meaningful phrases.

Set goals for next year.

Provide examples of successful approaches.

Staggered appraisals based on employee hire date may limit the large volume of effort and time that is required to do all appraisals at once. This method keeps employees on point throughout the year.

Middle managers should view employee appraisals as a two-part process. The first involves regular feedback. On a regular basis, middle managers should make the effort to conduct short and informal meetings with employees. The goal is to convey management's message and to get feedback from employees in a non-threatening way and on a regular basis. This also creates stronger and more open relationships. The second is a formal appraisal meeting. Once or twice a year, a manager should sit with the employee in a more formal setting in order to summarize all of the ongoing feedback and information appraisals that were conveyed through the year.

Middle managers should make the extra effort to add informal and more regular meetings to the traditional formal evaluation process, to enhance communication and offer opportunities to effectively address ongoing performance issues and improved employee morale.

Make sure expectations are clear. Communicating the expectations for success early in the program year is important.

Share examples of different components, e.g., good outcomes for horticulture, 4-H, etc.

There should be consequences for good and poor performance.

Make sure all components are connected: situation, objectives, educational activities and support materials, outcomes and impacts.

Don't wait for a full year, but follow-up within a few months on topics of greatest concern.

Be fair to all which may result in a poor annual evaluation for a typically good performer.

Schedule your calendar to prevent "District Director Burnout" during this time. The number of appraisals can wear you down and reduce your effectiveness.

Ideally, we should let people know how they are doing before the big day of the performance appraisal. It should not be a surprise if you feel their performance is lacking. Do not be afraid to tell the employee what they are doing wrong. Do not try to make them feel better by the end of the visit by praising them for other areas. They get confused and feel that you think overall they have nothing to work on.

Be prepared. Be professional. Always follow up with recommendations for improvements or change.

Spend enough time during the year with faculty by attending major programs, advisory meetings, etc. to have a very good idea of how successful they are being and the quality of work being conducted.

Provide feedback during the year as needed.

Be Honest. Correct perceived problems early.

Performance appraisals on good employees are not a problem. Those who are struggling with their work need regular and consistent communication and feedback from their District Director so that they know

what the expectations are, what resources are available to help them, and ultimately what the consequences are if they do not show improvement. The best scenario is to have "no surprises" at the time of the annual evaluation.

Gather the following information prior to the appraisal session: copy of the evaluation tool, any notes in the files, documented feedback from others, current disciplinary files, copy of previous evaluation comments to include goals to achieve and areas of improvement, and support documentation. Review the employee's self-appraisal ahead of time, if applicable. Make notes of suggestions for development ahead of time. Make notes of successes and point out opportunities for improvement.

During the appraisal discussion: create a comfortable environment for dialogue; discuss the employee's responsibilities for achieving the goals; discuss strengths and opportunities for growth, giving specific examples for both areas; offer suggestions for improvement; discuss goals and development needs for the coming year; open the floor for additional dialogue, and; ask the employee "what can you do to assist with their success?"

Utilize facts to guide your decisions when completing the rating. Give the score earned, and if your score is lower than the employee's self-rating, give the employee an opportunity to explain.

Avoid over-rating and under-rating employees.

Be careful to avoid the "Most Recent Event or Error" effect. In other words, do not let a recent unsatisfactory or outstanding episode immediately prior to the evaluation offset an entire year of work performance.

Use the appraisal as an opportunity for your growth as well. Try not to "breathe down the agent's neck".

Be fair and civil while using the appraisal as a tool to increase strengths.

Getting as much information as you can from many different sources provides more validation.

The evaluator is best served by asking probing open ended questions that solicit responses that may not have come out otherwise.

Remote Supervision of Faculty

Recognize that remote supervision is very difficult to do, and sometime very difficult to get to the truth about job performance and staff interactions.

Trust and support your local Extension leader, County Extension Director.

When traveling through the district, build in time to drop by Unit offices and visit with faculty and staff. It has been my experience that this is interpreted as a sign of interest rather than spying.

Develop mentors, peer coaches and teams.

This is the most challenging aspect of the position. You have to make yourself available to all of the agents as much as possible. I attend every quarterly FCS, ANR, and 4-H meeting in the district. I also visit both 4-H centers during every week of summer residential camp and attend as many district field days, programs, etc. as possible. The more you can interact with the agents the easier it is to supervise.

Support teamwork.

Encourage professional development.

Nothing can replace face-to-face visits/conversations with faculty and staff. Of course, the individual you are supervising will make the difference. Some can be remotely supervised, others can't. I feel it is especially important to have face-to-face contact with new hires for at least the first year.

Interactions and testimonies from peers help.

Working with faculty on projects helps.

Monthly video conferencing with County Extension Directors.

Regular contact with subject matter groups via batch emails on new research, grant opportunities, etc.

Attend field days, 4H camps, and an occasional fair or recognition banquet, etc.

We have biannual faculty meetings for professional development, general information sharing and fun.

Remote supervision works only when adequate communication exists. Such supervision is complicated when modes of communication are limited.

Keeping the lines of communication open. Let employees know that you want to keep the lines of communication open. They can call or e-mail you at any time with questions, concerns or just news and updates about what is going on at the office. Find out if their preferred means of communication is telephone or e-mail, or perhaps videoconferencing. Honor these preferences when communicating with staff.

Use technology as much as possible, such as Skype and Polycom, while maintaining that personal touch and observation.

If you have questions about putting in a good 40 hours, call office periodically at different times of day and keep records for future discussion if needed.

Try to get them involved with their peers so they are not isolated.

Identifying and documenting measureable goals is very important to the "remote location" form of supervision in Extension. Many agents work without day-to-day supervision, putting the responsibility on agents to document their work and show you their worth is an important part of the relationship.

Communicate often, try to personalize and ask for pictures in projects.

You may be remote, but with technology you are only a few clicks away. Stay in touch. Keep a list of dates when you have spoken to an employee or made a visit with them. It does not happen by accident, but by prior planning.

Do not hesitate to address behavior issues as they may quickly escalate and then you will regret not acting sooner.

Touch base on a regular time frame. Require regular reports.

Understand each of the people who work under you. Know their character, needs, successes and failures (if any). Let them know that you care about their well-being both in and outside of work.

Interactions in a non-appraisal environment help create a climate of trust.

When it comes to faculty, supervision is a "permanent" process, not a date on the calendar.

Set clear expectations and adhere to them.

I send a weekly update to the entire administrative team in my 20 counties, which includes leadership tips, review of deadlines and what is needed, and my schedule for the week.

Keep staff informed.

Be confidential as appropriate, but also open. This enhances trust and professionalism.

Be very observant visually and listen for hidden messages.

Remote supervision is not an ideal situation, but one many of us deal with. Have trustworthy local leadership including Unit Coordinators or County Directors who can keep you informed of things before they become major problems.

Stakeholder Relationships

Treat the locality with respect. Listen to what they are trying to accomplish and help them get there, rather than discounting their opinion.

Share successes of others.

Make sure faculty members are communicating outcomes and impacts.

Use multiple communication technologies.

Invite stakeholders and leaders to participate.

Encourage Units to do something special for stakeholders and local government partners at all levels, such as hosting a breakfast, lunch, or dinner using Extension recipes and locally grown products.

I continually encourage educators and CEDs to maintain active advisory councils/committees that involve those mentioned above as well as other key leaders in the total extension program.

Showing up is 90% of success - even if only two to three times a year.

Attending events of importance to the stakeholders helps show interest, develop trust, and foster mutual respect.

Unit Coordinators are the first contact to our stakeholders. As a middle manager you should make every attempt to meet county officials, partner agency personnel, as well as state agencies. The more you get out into the district the more opportunities you will have to meet with your stakeholders.

I focus my stakeholder relationship building on our county partners who provide > 70% of hard funding. This is done by programming directly to their needs (through annual needs assessments) and utilizing the entire land grant university rather than just the "Ag School." The other stakeholder relationships I leave to my agents.

Having a local presence that maintains the relationships and passes information through the administrative system as needed is critical. Such relationships cannot be maintained from afar.

Arrange for Extension staff and community members to come together and discuss local needs, how Extension can help, and Extension's overall impact on the community. This type of action allows communities to take an active leadership role in preparing for their future.

Visit with partners on a regular basis, not just when you need to address budget cuts.

Get your advocates to contact commissioners, etc. on regular basis to share success stories and values of Extension to their constituents.

It is important for the middle manager to build a relationship with County Government officials and not delegate all of this responsibility to the county director/coordinator. Direct communication even by email is important periodically.

Seek input from county management during review time. This supports the partner relationship and you might get some great insight.

You have to be visible at their events.

Establish a circle of supporters to help. Utilize local agents and leaders. Listen.

Be present at board meetings on a monthly basis, even if you are not on the agenda.

Utilize all faculty at the county level as well as advocates to market program outcomes and impacts.

Meet with stakeholders on a regular basis. Make it your goal that stakeholders know you and you are available to them (open door policy). Get out of the office and into the parish. Collaborate with agents to accomplish this.

Share brief, positive messages with the local governing body at least quarterly during the public comment period. They will likely remember your positive message and look forward to these occasions in public meetings that are otherwise dominated by drama and complaints.

Present an award to the agent in front of City Council or the Board of Supervisors, and always publicly thank the locality for their support.

Never forget the local people. We often leave them out of the loop when decisions are made. They view us differently than we view ourselves. Stay in touch with where the rubber meets the road.

Work through the local Unit Coordinator/County Director in regard to relationships at the county level whether it is local government, state legislators, partners, etc. The local faculty has the best opportunity for building local relationships so let them shine as much as possible. If there are serious relationship problems between local faculty and stakeholders, however, it may be best to intervene to help maintain a strong working relationship.

Get to know the intended stakeholders. Learn their preferences, likes and dislikes related to communication, projects, passion, etc.

Create an environment of sharing.

Clear documented communication that includes expectations of both.

Spend quality time building the relationship. Encourage stakeholder relationship building whenever possible. Support “back home” visits with members of Congress and state legislators.

Continue to tell the story... what Extension means in lives of clients, and the difference it has made. And when at all possible, quote an economic aspect so they can see their tax dollars at work.

Keep them all in front of you and on a partnership level not an adversarial level.

Provide monthly or quarterly brief impact statements with pictures—in a document that can be read in 30 seconds—to county commissioners and elected officials.

Put county commissioners and elected officials on the mailing list for subject matter newsletters.

Make sure county staff is on the county commissioner and county/city board of education agenda at least once a year to provide a presentation detailing impact of extension programs.

Be honest. Be seen. Be fair. Be timely. Be cautious. Be conscientious. Be professional. Be considerate.

Leadership

Lead by example.

The path of least resistance is not always the right path.

Let your employees know that you have their back on issues involving difficult clients. Address problems as they arise and have difficult conversations before things get blown out of proportion. Your employees will respect you for that.

Be willing to admit when you are wrong.

Leadership is either "tell others what to do" or "help others do the most they can with what they have". I prefer the second approach.

Challenge with new ideas.

Celebrate successes.

Treat everyone fairly and equitably. Being in the middle, you must also balance support for agents in the field with support for administration.

Share teamwork.

Work with all program areas.

Be honest.

Fairness and a willingness to pitch in no matter what the task at hand will go a long way toward building leadership skills.

Be known as one who follows the rules/regulations/policies/procedures of the organization.

So much of our job is management, but I look for opportunities to push the envelope and provide leadership for one or two efforts such as a focused educational event shared across my District via video conferencing annually.

Engage in moving the organization forward.

Meeting with faculty to get their points of view and providing a grass roots perspective to administration.

Be organized.

Nurture trust.

Be an open communicator.

Leadership means having the ability to influence followers. This ability comes from the ability to lead a group of people in the directions in which the organization is going. This means having the ability to achieve the missions and goals of the organization. However, these two things could not be achieved without vision. Therefore, in order to lead effectively everyone on the team must know where the organization is going and what is needed in order to come up with the end results.

Be motivating.

Treat everyone fairly.

Agents appreciate feedback. You will have too many agents to whom you can send a support note each month, but how often per year do you acknowledge each agent. You have many agents, they have one director. Set a goal to send a set number of positive notes each month! The other option is to become a grumpy old District Director.

Be dependable.

Provide opportunities for shared governance, i.e., input and buy-in to policies and procedures. Act as quickly as possible on issues and delivering information from on-high.

Do not simply serve as a pass through conduit for counterproductive administrative directives. Work to help state level administrators understand the nature of field extension if they don't know already.

Advocate for county educators/agents/faculty to county admin and deans, etc.

Watch your expression of free thinking ideas. As a middle manager, some will take your ideas as directives.

Be approachable.

Be timely in getting back with an employee and other aspects of your responsibilities.

Be a leader, not a micro-manager.

Support all programming (ANR, 4-H, FCS) areas as well as research and teaching aspects of the Land Grant model.

Expect a lot from those you supervise and hold them accountable.

Keep in touch with your superiors, co-workers, and subordinates. It is important that all involved know they are a part of the puzzle (EVERYONE)!!!

Praise in public but discipline in private.

Listen.

Motivate.

Fairly and effectively evaluate...set clear expectations and hold folk accountable.

Share successful examples without singling out individuals.

Often, your problem employees will require a great deal of your time. In spite of that, work to focus your resources and support on your best employees.

Always compliment good work.

Be present as much as possibly throughout the region and be willing to take an active role at events.

Be active in commodity activities.

Surround yourself with good people.

Allow employees to make mistakes without fear of failure.

A good leader understands the work of those that they supervise and has empathy for them. They must see how the organization depends on every part and the importance of each part. By doing this, they will be viewed as a part of the team and not someone in an "ivory tower" just passing out orders. Middle Managers should also take an active part in the programs of their faculty and attend when possible.

Gather facts before making critical decisions.

Inject solutions to problems rather than always complaining about problems.

Always be fair and truthful. Provide praise often for the fine work our staff does. Always respond promptly to requests from the counties.

It helps tremendously when agents know you have walked in their shoes.

The keys to leadership and influence are to do what you say you are going to do, and exercise sympathy and empathy. Essentially, use values based leadership practices and actions.

Take interest in each faculty member. Show employees that you care about them and will work for them to be successful.

Fiscal Management

Keep up to date on expenditures and balances.

Be transparent in the use of the middle managers budget, and fair and consistent with allocation of resources.

Always work from a budget. Building an adequate budget based on priority needs and funds available, then following it, is critical!

Financial management begins with the initial budget preparation to have as a guide for expenditures throughout the year. Consistent monitoring of the budget and expenditures (at least monthly) is crucial to staying on target. In Virginia we allocate money to the units in July and then again in January as this helps the units stay within their budget allocations.

Begin working with Unit Coordinators to make sure travel reimbursement vouchers are caught up and the UC knows the operating account balance several months before the end of the fiscal year. Plan accordingly and stay on top of things to avoid surprises at the end of the fiscal year.

Trust but verify. Reviewing financial reports regularly (monthly) can help avoid tough situations. Holding employees accountable for the stewardship of operating funds is also important.

Always have a growth plan for each county even in bad times.

In an environment of declining real resources, productivity gains are critical if institutions are to avoid stagnation and decline (Peterson, 1997, p. 298). Such gains can be realized whether through changes in production functions or through reallocation of resources to higher-value programs and services (growth by substitution).

A prolonged period of financial stringency affects planning and budgeting and underlying fiscal strategies (Peterson, 1997, p. 298). For example, Massy (1994) hypothesized that as financial stress increases non-profit institutions are likely to behave more like for-profit institutions (Peterson, 1997, p. 298). We have to operate with the same business sense as a for-profit business.

Keep upper administration informed of any potential problems.

Make sure county level administrators are active in that level of funding.

Use a local budget submission form that demonstrates the state side of the investment.

In regard to local accounts: have clientele sign checks, make sure a financial review is conducted each year, Extension should approve funding requests, and volunteers should only manage the account. Fund-raising is also an expectation of clientele who manage accounts - work with university foundation experts.

Employees that have ample travel and resources to do their jobs are more motivated employees. Work with them and your superiors in assuring there is a way to make this happen through the use of extramural funding or whatever it takes. Funding must be acquired to have the tools needed.

No cash!

If an item is questionable, don't do it.

Use "prevention" to reduce "intervention."

Keep everyone under your supervision informed.

Be good a good steward of local dollars. The locality will recognize and appreciate this.

Help counties set up effective accounting principles and make sure counties understand financial accounting expectations from both university and county government.

Continue to ask.

Be aware of your budget balance, and spend according to the approved budget.

Marketing Extension

People still don't know who and what Cooperative Extension is. We need to market all our programs.

We can all do a better job in marketing extension.

History can be the best or worst influence on local or county Extension marketing. If Extension's history is strong and valued in the county, marketing maintenance is all that's typically needed. When Extension's history indicates there has been a lot of staff turnover with few on-going high quality programs and not particularly good customer service, marketing efforts may be ineffective.

Marketing is an attitude, not just a few things Extension does to be known.

Define what we market, to whom, and for what purpose.

Extension is many times a key player in a major educational effort through a partnership with another organization and yet too often we are not recognized in promotional material for our efforts. It is crucial to get Extension recognized in the beginning as a partner and not wait until the event is over and hope that people know who did the work.

Deliver excellent educational programs. Positive word of mouth is a must in marketing.

Take advantage of the growing trend in social marketing. This helps us reach new audiences.

Marketing Extension, or at least being a public information resource, is at least as important to the job as programming. Very often people just want a connection or link to a credible source of expert assistance.

Target marketing efforts effectively, especially in urban markets.

Utilize communications faculty in developing marketing campaigns.

Utilize F and A funds to market Extension programs.

Cooperative Extension's niche is providing unbiased, quality information to constituents. We need to ensure that this message is shared as there is so much competition in the delivery of information as well as private companies utilizing extension information in their own education endeavors.

Establish and maintain effective communications with Extension retirees and ask them to advocate.

People are relying on television (news) and Internet sources more often for their information. Extension may need to invest in television spots and marketing tools such as Google Ads. Prime billboard locations are available with no rental fees for non-profit, statewide beneficial messages.

Hook up with the local alumni clubs to use their networks and connections.

Send success stories (not just event announcements, but program successes) to media on regular basis.

Extension knows how to market programs but has no clue how to market itself. Be a part of a new generation that does not assume Cooperative Extension will never be replaced just because of our history or land grant connection. We are the best option but we are replaceable if we do not perform.

Utilize an advisory system to carry messages or advocate on behalf of Extension.

Identify people of influence that can and will advocate.

Always be looking for new ideas and better ways of doing things.

Don't discount the little things. They do create huge sums, even when not expected.

The best marketing is having a strong Extension program in the county. It is also the best way to get funding. Counties that have Master Gardeners, large 4-H programs, large homemaker programs, etc. seldom have huge funding issues.

Attend regional and national conferences.

Review the literature - keep up with what is happening in other states.

Be everywhere.

Be engaged with stakeholders and audiences.

Do not be afraid to try new things.

Concluding Thoughts

Seek a mentor and continue to grow professionally.

Encourage innovation, needs assessments, and embracing new technologies. I've seen the most change occur when the "old guard" retires and the new generations take over.

Develop personal relationships and you will develop loyalty. Such loyalty will inevitably be called upon in the future.

Listening is a powerful tool and provides insight that opens the door to understanding and growth in the organization. When people know that someone cares about what they have to say, they are more willing to provide excellent service because they feel that they are an integral part of the organization.

Make sure directors are aware of issues.

Always be training your replacement or you cannot get promoted.

Make time with your family, or live with regrets. Leave issues at the door when you get home.

Your job is never finished.

Communicate.

Continue to learn.

Trust your faculty and invest in them.

Build a strong team, with mentors and coaches. Reward teamwork.

Share successes.

Continue to learn.

Share your expertise.

Listen to others but do not take all the advice offered.

Recommendations for Further Reading

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