

**SR-PLN VIRTUAL PRE-EVENT**

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# **BECOMING AN EMPLOYER OF CHOICE**

**ATTRACTING & KEEPING TOP TALENT  
IN EXTENSION**

Tearney Woodruff, Ph.D., Assistant Professor &  
Extension Specialist

Hannah Gerken, Extension Program Specialist

*August 7, 2024*

TEXAS A&M  
**AGRILIFE**  
EXTENSION



# RETENTION FROM RECRUITMENT TO RETIREMENT

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## WHY IT MATTERS

One of the foundational values of Texas A&M AgriLife Extension Service is **people**. This speaks mostly to the value we place in each of our employees as those who work day in and day out to make a difference in the lives of Texans. If we value our people, our actions should demonstrate that through efforts to retain them.

To carry out this value and enhance retention, we must continue to prioritize and champion the employee experience and improve employee engagement.

We begin this from recruitment to their first day and throughout their entire career with Extension.

- **Employer of Choice:** An organization that attracts and retains the best candidates with a desirable work culture and environment.

# STATEWIDE RECRUITMENT | CONSISTENCY & COLLABORATION

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## ATTRACTING TOP TALENT

Our goal is to provide consistent messaging across the state for both what it means to be part of the Texas A&M AgriLife Extension Service family and what we are looking for in future employees.

### Points of Emphasis:

- Show what people want to be part of it:
  - Flexibility & Autonomy
  - Value Alignment
  - Geographic Element
- Clarity of Organization and Roles
- Recruitment Language
- Aesthetic Appeal
- Statewide consistency, collaboration, and communication

# STATEWIDE RECRUITMENT | CONSISTENCY & COLLABORATION

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## HOW WE DO IT

Resources were developed and provided to hiring supervisors/managers from the state level. The following tools were redesigned or developed to better reflect the Extension brand and values, while intentionally highlighting the reasons why people choose to work with Extension and clarifying the wide variety of roles and opportunities across the state.

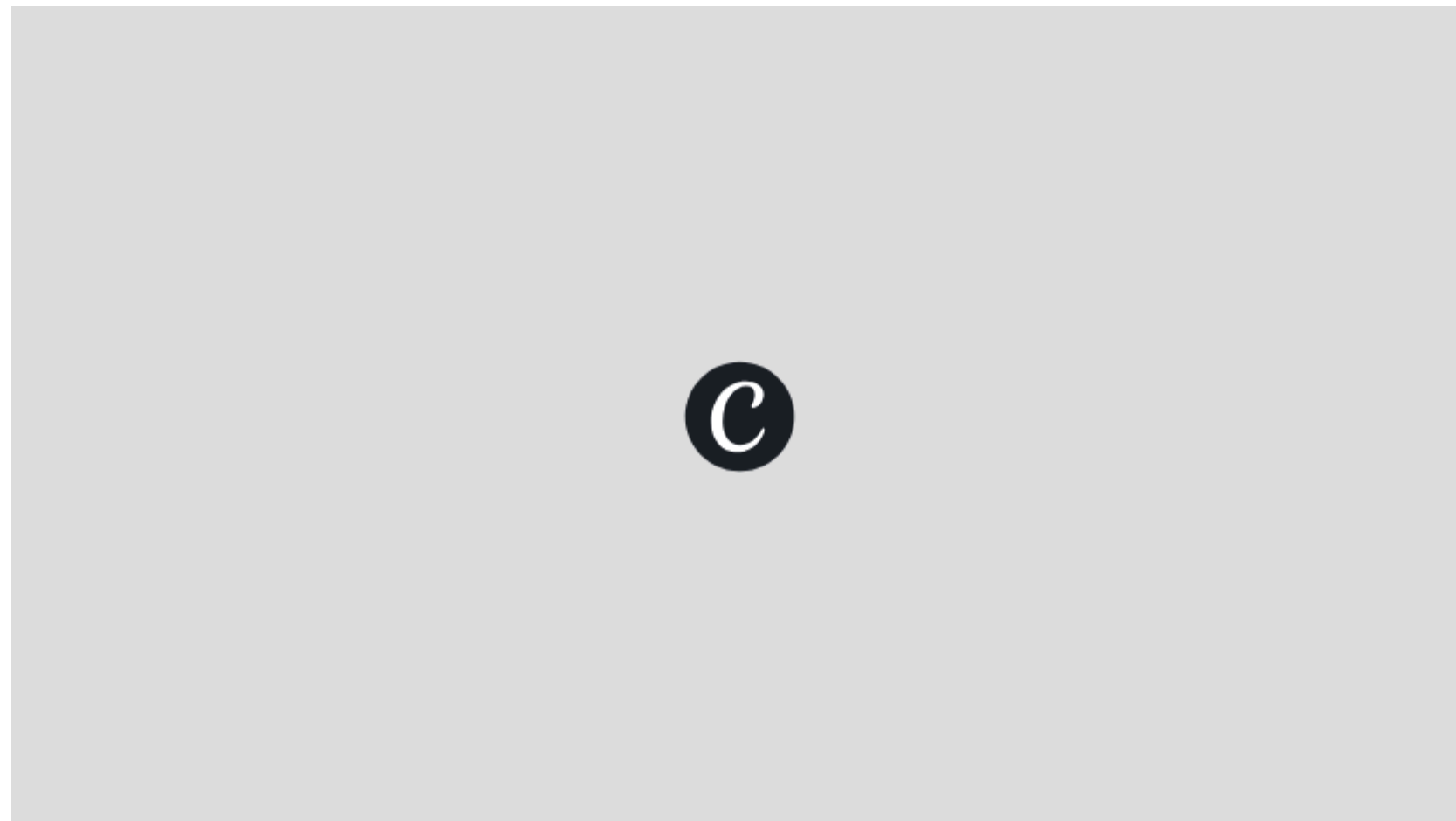
These resources include:

- Interactive Statewide Vacancy Map
- Recruitment / Agency Overview Presentation with Talking Points
- Recruitment Booklet for Highly Interested Candidates
- One-Pagers and Postcards for Career Fairs
- Interest Form for Internships, Positions, etc.
- Revamp Internship Program (timeline and engagement)

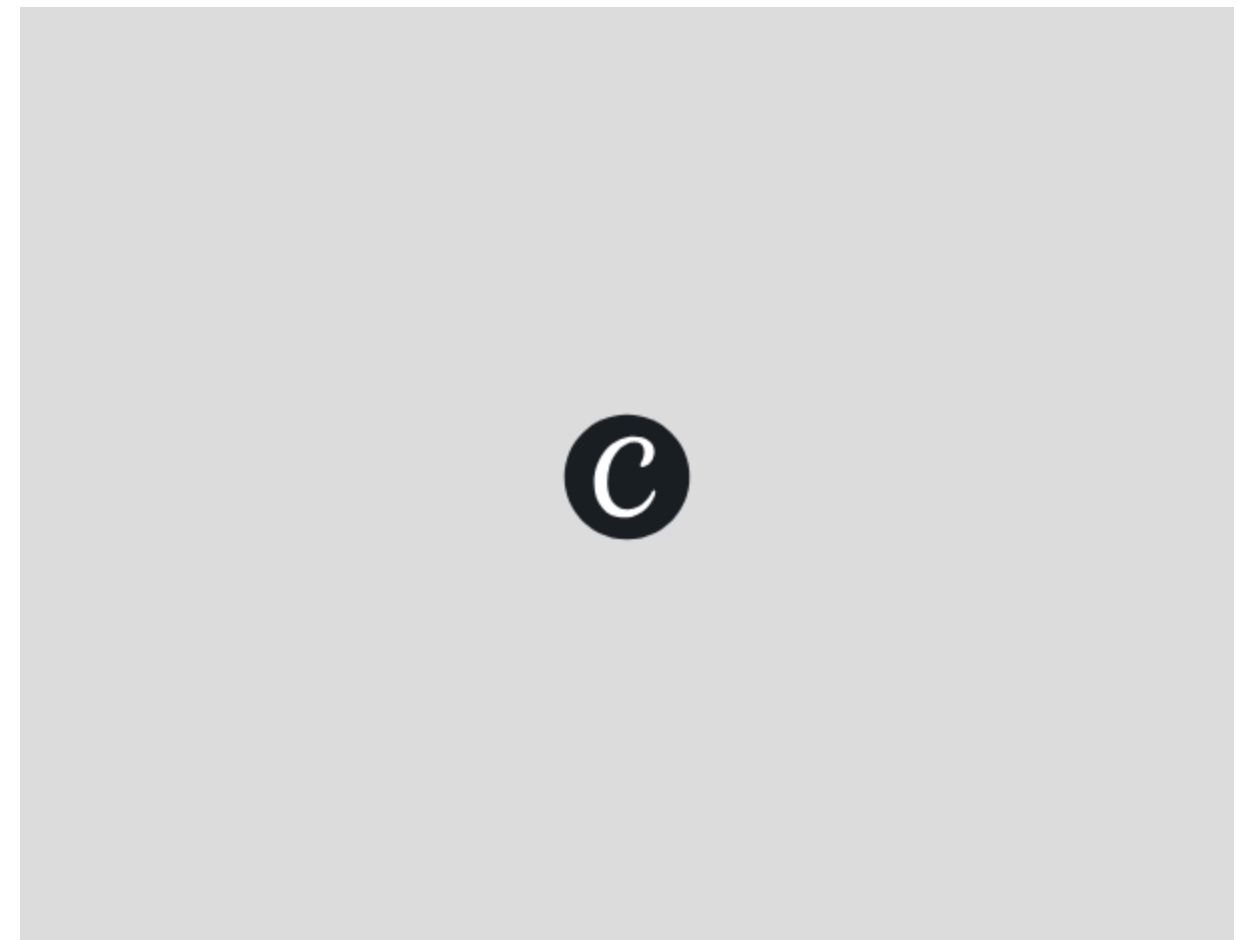
# STATEWIDE RECRUITMENT RESOURCES

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**Recruitment / Agency Overview Presentation  
with Talking Points**



**Customizable Recruitment Postcard  
for Career Fairs**

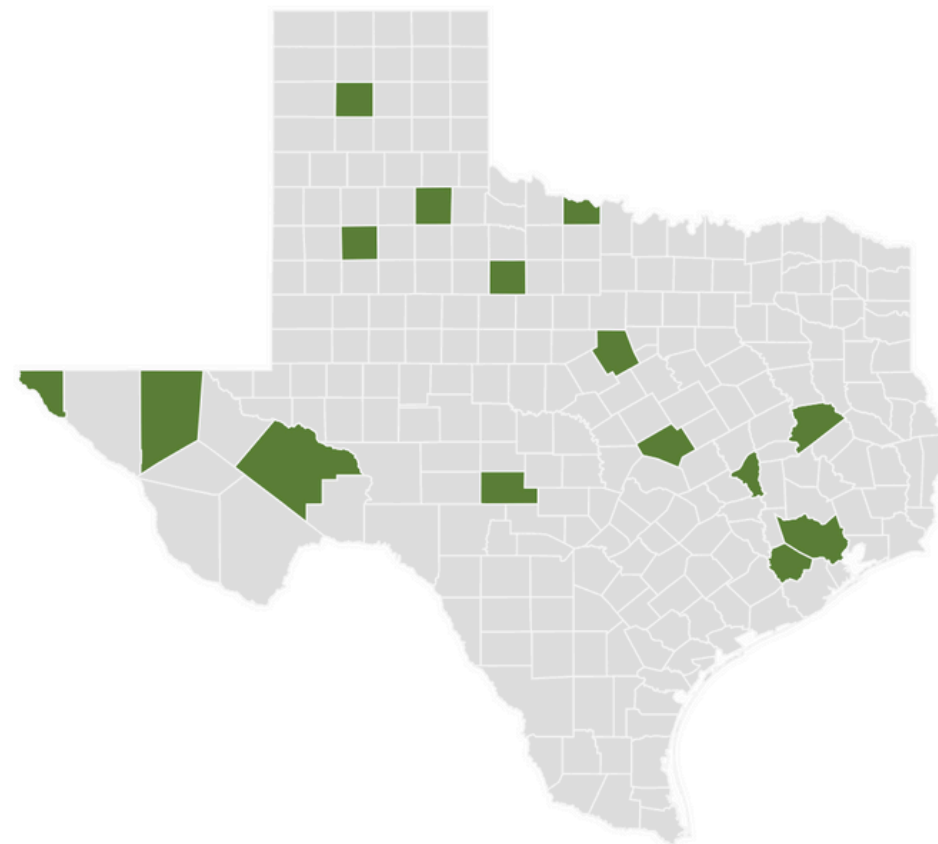


# STATEWIDE RECRUITMENT RESOURCES

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## Interactive Statewide Vacancy Map & Interest Form

### Explore Extension Job Opportunities



#### Work Where You Want to Live

- Hover over the map to view current job openings in AgriLife Extension across the state.
- Counties that are highlighted in green have open positions.
- Click on a county to view a list of local open positions.
- Follow each job link for additional details and steps to apply for that position.

A searchable list of all open positions within the AgriLife agencies can be reviewed at the links below.

# CHAMPIONING THE EMPLOYEE EXPERIENCE

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## STARTING STRONG

We want each employee to start in their role with a sense of support in both resources and community.

To achieve this, we have implemented many different initiatives around onboarding including:

- Standard Start Dates
- Make Day 1 Great
- PEER | Personal Extension Educator Resource
- Onboarding as a Cohort
- Highly Effective Orientation
- 1.5 Years of Structured & Coordinated Training & Support

# ENHANCING EMPLOYEE ENGAGEMENT

## CONTINUOUS LEARNING OPPORTUNITIES

A key part of retention is offering opportunities for employees to continue learning and growing, especially towards roles of leadership and advancement. Through the development and launch of an internal learning management system, AgriLife Aspire, we are able to offer trainings in supervision, management, subject-matter expertise, and more. This helps to provide more opportunity for learners that may be limited by the costs of in-person trainings.

The screenshot displays the AgriLife Aspire Course Catalog interface. At the top, a dark red navigation bar contains the AgriLife Aspire logo and links for Home, Course Catalog, My Training Dashboard, Site Guide, Mobile App, Upcoming Events, Create a Training on Aspire, and Aspire Ambassador. Below this is a blue header with the text 'AGRILIFE ASPIRE Course Catalog'. The main content area features a search bar, a filter sidebar on the left, and a list of training courses. The sidebar includes a 'Reset' button and categories such as Interpersonal Development (172), Technology (143), Business (112), Creative (65), and AgriLife-Specific Employee Resources (50), which is currently selected. The 'Training Type' section shows e-Learning (41) and Instructor Led. The main list shows 'Highest Ranked Training' with two items: 'Office Management and Professionalism' and 'Pest Management: CEUs'.

AgriLife Aspire  
Home Course Catalog My Training Dashboard Site Guide Mobile App Upcoming Events Create a Training on Aspire Aspire Ambassador

AGRILIFE ASPIRE  
Course Catalog

Search Course Catalog AgriLife-Specific Employee Resources X Reset all

Categories Reset

- Interpersonal Development (172)
- Technology (143)
- Business (112)
- Creative (65)
- AgriLife-Specific Employee Resources (50)

Show more +

Training Type

- e-Learning (41)
- Instructor Led

Highest Ranked Training

- Office Management and Professionalism  
This course will introduce lessons that provide general information on professionalism and career management to ensure success.
- Pest Management: CEUs  
This training covers pesticide continuing education units (CEUs) and procedures for agents to provide CEU programs.



# CELEBRATING WHAT WE WANT TO RETAIN

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## RECOGNITION

- Timely recognition
- Meaningful recognition
- Peer-to-peer recognition
- Lower barrier or effort to recognize
- Early career recognition
- Combat the “wait your turn” recognition culture
- Connect recognition to culture and qualities want modeled

**RECOGNITION MATTERS EVEN MORE IN EXTENSION.**

# THE SYMBIOTIC RELATIONSHIP OF RETENTION & RECRUITMENT

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**What are your employees saying about their employment experience?**



## THANK YOU!

### QUESTIONS?

**Tearney Woodruff, Ph.D.**  
tearney.woodruff@ag.tamu.edu

**Hannah Gerken**  
hannah.gerken@ag.tamu.edu

TEXAS A&M  
**AGRI LIFE**  
EXTENSION



Attracting Talent to  
**Oklahoma State  
University Extension**

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Lyndall Stout and Jami Mattox

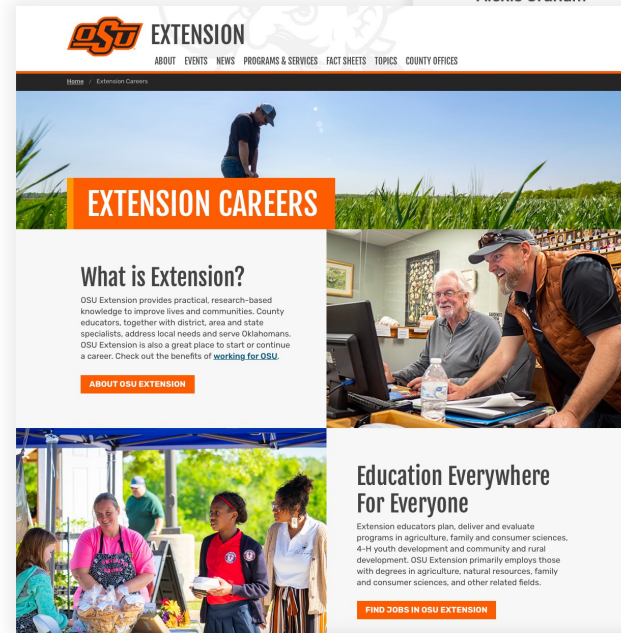


# Help Wanted!

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# Extension Careers Website

- Launched October 2022
- 6,219 visits to date
- Testimonials switched out quarterly



## Why should you choose Extension?



Alexis Graham



Paul Beck

Beef Nutrition Extension Specialist

Extension is a very rewarding career for people that have a service mentality and find fulfillment in helping others. I have made connections across all walks of life in my Extension career and many of those connections have become friends.



JJ Jones

Extension Area Economics Specialist

Extension will be one of the most fulfilling, gratifying, and frustrating jobs you will ever have. You get to work with a myriad of different people and producers. You will have opportunities to go places and see things that other jobs can't offer. Extension will take you as far as you want to go as long as you are willing to put in the effort.



Heather Winn

Extension Educator

I enjoy teaching people life skills that will help them now and in the future. Do what you love and love what you do. I have worked for extension for 28 years and wouldn't change my career if I could do it over again.

## Extension Employee Benefits

Extension means being a part of OSU. Take advantage of the many benefits and opportunities that are offered to OSU employees.

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ork.

### Paid Leave

OSU employees receive 13 paid holidays annually and accumulate paid sick and annual leave on a monthly basis.

[Holiday & Leave Benefits](#)

### Retirement Benefits

OSU offers a variety of retirement benefits that are available immediately upon hire.

[Retirement Benefits](#)

### Employee Tuition & Fee Waiver

Full-time faculty and staff may receive a waiver of half the tuition on courses and a waiver of specified fees if they enroll in OSU courses.

[Tuition & Fee Waiver](#)

### Dependent Tuition Waiver

The dependent children of OSU employees are eligible to receive a 100% undergraduate student resident tuition waiver for courses.

[Dependent Tuition Waiver](#)

### Public Service Loan Forgiveness




If you are employed by OSU, you might be eligible for the Public Service Loan Forgiveness Program.

[Public Service Loan Forgiveness Program](#)


# Social Media Campaign

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- Launched October 2023
- Ad spend: \$300 for 3 weeks
- Click-through rate: 1.12% (0.73% average in the education industry)

 **Oklahoma State University Extension** Sponsored ·  

"You really feel like you are impacting individuals and their operations." – Rosslyn Biggs, DVM, beef cattle Extension specialist



extension.okstate.edu  
**Find Your Future in Extension** [Learn more](#)

 **Oklahoma State University Extension** Sponsored ·  

"If you enjoy helping others, Extension is unique in that you can have an impact in a variety of ways." - Brian Whitacre, Extension Ag Econ Specialist



extension.okstate.edu  
**Find Your Future in Extension** [Learn more](#)



# Words of Wisdom for Extension Middle Managers

A compilation of Survey Responses from SRPLN Middle Managers

Danny Peak – Virginia Tech

Jeff Young – University of Kentucky





# Words of Wisdom for Extension Middle Managers

A compilation of Survey Responses from SRPLN Middle Managers

By: Blake Lanford (Clemson), Brenda Rogers (UF), & Judy Ashley (GA)

2016

# Ice Breaker

What are the biggest Extension Workforce  
Challenges you are facing?

List in chat



# Table of Contents

## 9 Chapters

1. Hiring
2. New Agent Training
3. Performance Appraisal
4. Supervision
5. Stakeholder Relationships
6. Leadership Resources
7. Financial
8. Marketing Extension
9. Technology



# Focus for Today

- Hiring
- New Agent Orientation and Training
- Performance Appraisal
- Supervision / Development

**HUMAN  
RESOURCES  
PLAN**

# Focus for Today

- **Hiring**

\*Describe any traditional and/or non-traditional strategies your institution has used for recruitment of Extension staff.

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PLAN**

# Focus for Today

- **Hiring**

- Career Fair

- Online Job Sites (InDeed or LinkedIn)

- Summer Intern Program

- Open period for Internal Transfers

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PLAN**

# Focus for Today

- **New Agent Training**

\*Describe any formal or informal new agent training techniques that exist within your organization. Link to resources.



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# Focus for Today

- **New Agent Training**

- Orientation – in districts or in statewide cohorts

- Mentoring

- Shadowing

- Access to catalog of in-service training options

**HUMAN  
RESOURCES  
PLAN**



# Focus for Today

- Performance Appraisal

- \*What methods are used to reward excellent performance through your institutions performance appraisal process?

- \*What are some strategies for dealing with difficult or unsatisfactory performance appraisals?

**HUMAN  
RESOURCES  
PLAN**

# Focus for Today

- Performance Appraisal

\*What methods are used to reward excellent performance through your institutions performance appraisal process?

- Promotion and Tenure
- Merit (consistent statewide/ district)
- Career Ladder

**HUMAN  
RESOURCES  
PLAN**

# Focus for Today

- Performance Appraisal

\*What are some strategies for dealing with difficult or unsatisfactory performance appraisals?

- Progressive Discipline
- Document
- Be honest and fair
- Communicate often
- Performance improvement plan

**HUMAN  
RESOURCES  
PLAN**

# Focus for Today

- Supervision

- \*What strategies must middle managers deploy to ensure staff accountability on a regional and/or mobile basis?

- \*What communication techniques must middle managers use to ensure organized engagement?

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PLAN**

# Focus for Today

- **Supervision**

\*What strategies must middle managers deploy to ensure staff accountability on a regional and/or mobile basis?

- Hire well
- Regular check-ins
- Communicate often
- Depends on the individual

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RESOURCES  
PLAN**

# Focus for Today

- Supervision

\*What communication techniques must middle managers use to ensure organized engagement?

- Regular check-ins (in person, virtual)
- Newsletters
- Conference Calls
- State Conferences

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PLAN**

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**Thank You**

# Onboarding:

## *The good, the bad, and the ugly*

Bethany Eigel, Associate Specialist - VCE Learning & Organizational Development  
Sarah Sharpe, Extension Agent - Agriculture and Natural Resources  
Alyssa Walden, Deputy State 4-H Leader  
Sarah Baughman, Associate Director - VCE Learning & Organizational Development  
Dan Goerlich, Associate Director - VCE Economy, Community & Foods



# Where we've been

## VCE onboarding in the past

2021 Organizational Effectiveness Plan  
Internal review of VCE Onboarding  
Inconsistent levels of onboarding & delivery  
Gaps in communication  
Unstructured approach as a system  
Transitions with regard to onboarding responsibilities

# Where we've been

## The mission of onboarding

### Satisfying the Extension “Balancing Act”

Too little info **vs.** Too much info  
Personal life **vs.** Professional demands  
State expectations **vs.** Unit expectations  
Learning your role **vs.** Learning your community

### What do we want to accomplish with onboarding

Bigger than retention  
Relationships  
Unified system of support

# Where we are

## The good!

- Cohort model
- New position November 2023
- Concentrated onboarding responsibilities
- Onboarding toolkit
- Intentional focus on unified approach
- Communication improvements
- Emphasis on POV of the new hire

## The bad!

- Significant travel & unit absence
- Overlapping training dates, topics
- Mediocre mentorship program
- Information overload!

## The ugly!

- Never a perfect time or date
- Gap for FCS
- Inconsistencies within the system
- Communication challenges

# What we've learned

**Connections over content**

**Details matter**

**Engagement**

**Recognizing the talent in the room**

**Value of formative evaluation in addition to survey feedback**

# Where we're going

## Expand the good!

- Two Cohorts/year + subject cohorts (4-H, ANR & SNAP)
- Continued streamlining & unification for VCE onboarding process
- Toolkit expansion to address ongoing needs, provide consistency
- Use feedback from participants to inform future decisions

## Eliminate the bad!

- More up-front & transparent training expectations during the hiring process
- Aligned training schedules & shared calendar
- Refinement of topics
- Mentoring curriculum & training
- Onboarding roadmap to prevent overlapping & overwhelming

## Examine the ugly!

- FCS subject-specific onboarding is in development for 2025
- Regular, cross-programmatic meetings for onboarding leads
- Employee Development: POC to improve consistency, accountability

# Questions? Please reach out!

4-H subject-specific onboarding: Alyssa Walden, [waldenaw@vt.edu](mailto:waldenaw@vt.edu)

ANR subject-specific onboarding:

Dan Goerlich, [dalego@vt.edu](mailto:dalego@vt.edu)

Sarah Sharpe, [seweaver@vt.edu](mailto:seweaver@vt.edu)

General onboarding for all new agents: Bethany Eigel, [baeigel@vt.edu](mailto:baeigel@vt.edu)

Martin-Gatton College of Agriculture, Food and Environment

# SR-PLN Virtual Event Regional Director Roundtable for New Agents

Natasha Lucas-Central Region Director

Jeremy Teal-West Region Director

Daniel Wilson-East Region Director

## Session with New Agents

- This session gives an informal opportunity for new agents to meet the 3 Regional Directors of University of Kentucky Extension.
- In our system as a new hire, they would have already interviewed with their respective Regional Director and their respective direct supervisor, the Area Director, but most likely not have interacted with the other Regional Directors.
- This session is conducted during our new agent orientation process. Usually within the first 3 months of employment.



# Goals for the Roundtable

Strengthen

- Strengthen thought process/problem solving for new Agents.

Prepare

- Prepare new agents on how to think through tough situations.

Provide

- Provide information to new Agents in a unique interactive way.

Help

- Help our Area Extension Directors on topics needing addressed at initial employment.

Set

- Set the standard at the beginning on where you go for support.

# Situational Discussions

## New Agent Luncheon

- We post a scenario and give agents a couple of minutes to think about it and then we discuss as a group.
- We are there to learn, so we encourage agents to take a shot at the answer even if they don't know for sure being new hires.
- Some of the scenarios might be not in everyone's specific program area but all can be situationally related.





# Scenario #1

- Your county is planning to take producers to the KY Beef Bash, currently you have 10 farmers wanting to go. A full office van load that one agent can drive them to.
  - How do you plan for this trip?
  - What forms do you fill out?
  - Do you need to take out Excess Medical Insurance as precautionary?

# Scenario #1 Answer

You would need to complete a Risk Management Plan.

**Make sure you do a county itinerary.**



Excess Medical would be required if the event was strenuous or had an added risk to it. Example Chute Side BQA Training, hands on activities.

# Risk Management Plan

- Link that takes you to the plan:
- [https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/risk\\_mgmt%20fillable\\_plan\\_template\\_final.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/risk_mgmt%20fillable_plan_template_final.pdf)



University of Kentucky  
College of Agriculture,  
Food and Environment  
Cooperative Extension Service


## RISK MANAGEMENT PLAN TEMPLATE FOR PROGRAMS, EVENTS AND ACTIVITIES

*The following is to be used when planning an event to ensure that all necessary steps and precautions to manage risks have been taken.*

1. **Name of group** \_\_\_\_\_
2. **Date and Location of event** \_\_\_\_\_
3. **List the learning objectives and opportunities** that will take place with this program.  
\_\_\_\_\_  
\_\_\_\_\_
4. **Name and contact information for each person (staff and volunteer)** providing leadership for the program, event or activity. \_\_\_\_\_
5. **Name and contact information of specialist** involved with this event. \_\_\_\_\_
6. **List all volunteers** that will be involved in the program, event or activity, along with their **contact information** and indicate that they have **completed the entire screening protocol** and have **been accepted** if applicable. \_\_\_\_\_
7. **List steps** that will be followed prior to program, event or activity to **ensure a safe learning environment**. \_\_\_\_\_
8. **Determine the medical accessibility** (medical facilities) and **protocol** in case of **medical emergency**. \_\_\_\_\_
9. **First Aid Kit**. Name the designated person responsible for the First Aid Kit. \_\_\_\_\_
10. Identify the **mode of travel** and considerations. \_\_\_\_\_
11. **Supporting Documents:**
  - a. Attach an **Emergency Action Plan**, detailing emergency telephone numbers for participants to call in case of emergency and designate a location for the group to meet in case group gets separated.
  - b. Attach **itinerary** or program outline.
  - c. Attach a copy of the **lease, rental agreement** or copies of the tickets.
  - d. Attach an **Out-of-state travel** request if applicable.
12. Obtain accident and other insurance for the event. Insurance information can be found at <http://ces-manuals.ca.uky.edu/content/office-procedures-insurance>
  - a. Take copies of the Insurance Claims Forms for the event while in travel status.
  - b. Take copy of the carrier's insurance policy.
  - c. Take copies if the incident forms for the event.
13. Secure **participation information** and take copies to the event.
14. Follow all travel policies.
  - a. Extension guidelines are located at <http://ces-manuals.ca.uky.edu/content/travel>
  - b. University policies are located at <http://www.uky.edu/EVPPFA/Controller/BPM.htm>

# Excess Accident Medical Insurance

- <https://www.uky.edu/administrativeservices/insurance>
- UK Version is for Youth only.



Customer Service : 1-866-838-9536

## EXCESS ACCIDENT MEDICAL INSURANCE

### ELIGIBILITY GUIDELINES

You are eligible to apply for the Excess Accident Medical Insurance if you meet the Activity/Camp Eligibility Guidelines below:

1. The Activity/Camp must be sponsored by the University and supervised by University personnel. Essentially, a University department must take responsibility for the organization, hosting, and (usually) funding of the activity.
2. The Activity/Camp must be one of the following: summer camp, sports activity, field trip, activity involving participants under age 18, or an activity involving more risk than would typically be expected in an academic learning setting (i.e. rock climbing, snow skiing, workshops with power tools, youth livestock show).
3. Ineligible Activities/Camps:
  - a. University of Kentucky Athletics Department Activity/Camp insurance is managed through a separate policy.
  - b. Student organization activities.
  - c. Activities held on University property but operated by an outside organization.

Click here if you satisfy the eligibility guidelines above.

[Continue](#)

Quick Links  
Policy Highlights

# Excess Medical Insurance for Adults – Example

- American Income Life
- <https://www.ailife.com/Pdfs/documents/Extension%20Group%20Policy%20Application.pdf>



AMERICAN INCOME LIFE  
insurance company

SPECIAL RISK  
DIVISION

PO BOX 50158 • INDIANAPOLIS, IN • 46250

Phone: 800-849-4820

[www.AILspecialrisk.com](http://www.AILspecialrisk.com)

Fax: 317-849-2793

## Application for Extension Group Annual Accident Coverage

Name of Group \_\_\_\_\_

Name of Leader \_\_\_\_\_

List Projects \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ County \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Desired Effective Date \_\_\_\_\_

Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

Has this group had one of our annual policies within the last year? Yes  No

# of Regular Members \_\_\_\_\_ X \$1.00 = \$ \_\_\_\_\_

# of Regular Leaders \_\_\_\_\_ X \$1.00 = \$ \_\_\_\_\_

# of Horse\* Members \_\_\_\_\_ X \$2.00 = \$ \_\_\_\_\_

# of Horse\* Leaders \_\_\_\_\_ X \$2.00 = \$ \_\_\_\_\_

TOTAL ENCLOSED: \$ \_\_\_\_\_  
*(\$10.00 minimum)*

As authorized leader of the above group I request that a Master Policy be issued on the effective date requested, or on the date this application is received, whichever is later. We are enclosing a check or money order payable to the American Income Life Insurance Company, PO Box 50158, Indianapolis, IN 46250, calculated at the rate of \$1.00. \*(\$2.00 – horse, motorcycle/ATV & team sports) for each person to be covered.

SIGNED \_\_\_\_\_

Are Leaders to be insured? Yes  No

If "Yes," list names (attach additional pages if needed):

\_\_\_\_\_



FOR HOME OFFICE USE ONLY

Policy # \_\_\_\_\_

Issue Date \_\_\_\_\_

Date Received \_\_\_\_\_


Form 103-86 Revised 6/2019



## Situation #2

- Your county office is having their monthly homemaker meeting, there are 20 members present at this program. As the homemakers start to leave, the last one out the door trips and falls and cannot get up.
- What do you do?
- Who do you call?
- Are there any forms to fill out?





# Scenario #2 Response

First thing is to contact  
the local emergency  
authorities,  
ambulance, etc.

Then contact your  
direct supervisor.

Forms to Fill out=?

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# Employee, Volunteer and Youth Accident/Incident Report Form

[https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident\\_report\\_form\\_oct\\_2017.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident_report_form_oct_2017.pdf)

## Employee, Volunteer & Youth Accident/Incident Report Form

**This incident report form is intended to record accident/ incidents of employees, volunteers and campers.**

This incident report is required for serious illnesses; significant behavioral problems; or incidents involving injuries such as fractured bones, chipped or broken teeth, extensive lacerations involving sutures, falls involving unconsciousness, dislocations, incidents involving water which require resuscitation, or any injury requiring a hospital stay. This incident report is **NOT** required for incidents such as scrapes, bruises, sprains, etc.

**Volunteers and campers are not employees of the University of Kentucky and volunteering for Cooperative Extension Service is not a contract for employment.**

**Attention: Employees injured during the course and scope of employment should report accidents/injuries to UK Workers Care, 1-800-440-6285 in addition to completing this form. These notes will provide a useful history of events.**

County Extension Service office \_\_\_\_\_ Date of report \_\_\_\_\_

Extension employee \_\_\_\_\_

Address of office \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name of injured or involved person(s) \_\_\_\_\_ Age \_\_\_\_\_ Sex \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name of injured or involved person(s) \_\_\_\_\_ Age \_\_\_\_\_ Sex \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name of Parent or Guardian (if minor) \_\_\_\_\_ Sex \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name/Addresses of witnesses (Each witness should attach a signed statement of what happened.)

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

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

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

Type of incident:  Behavioral  Accident  Illness  Other

Date of incident: Time \_\_\_\_\_ (a.m. or p.m.) Date \_\_\_\_\_ Month \_\_\_\_\_ Year \_\_\_\_\_

Describe the incident in detail (use additional pages; if necessary)

\_\_\_\_\_

# Employee, Volunteer and Youth Accident/Incident Report Form

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[https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident\\_report\\_form\\_oct\\_2017.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident_report_form_oct_2017.pdf)

Location of incident and diagram showing objects and persons

What activity was the injured participating in at the time of the incident?

Describe any equipment involved in the incident

Describe emergency procedures followed as a result of this incident

---

Medical Report of Incident

Were the parent(s) or guardian notified? Yes No How? \_\_\_\_\_

By whom? \_\_\_\_\_ Title \_\_\_\_\_ When \_\_\_\_\_

Response of individual notified: \_\_\_\_\_

Where was treatment given? ON site Doctor's office/clinic Hospital Rescue squad

Describe treatment given: \_\_\_\_\_

Treatment given by whom? \_\_\_\_\_ Date of treatment: \_\_\_\_\_

Was injured retained overnight in hospital? Yes No If yes, where? \_\_\_\_\_

# Employee, Volunteer and Youth Accident/Incident Report Form

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[https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident\\_report\\_form\\_oct\\_2017.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident_report_form_oct_2017.pdf)

Name of attending physician \_\_\_\_\_

Physician's recommendation at the time of report  
\_\_\_\_\_

Comments  
\_\_\_\_\_

Other persons notified: (county agent, district director, camping specialist, Ass't. Director of 4-H)

Name	Position	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____

Person completing report:

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_



## Scenario #3

- You are in the office and a community member walks in asking for printed financial records for the past 5 years for the County Extension District Board (bank statements, reconciliations, and budgets).
- Is this an Open Records request situation? If so, what do you do?
- Can you give them the documents or would that come through UK?

# Scenario #3 Answer

---

This would definitely be an Open Records request situation.

---

Request must be given in writing to make it official.

---

Send the request to [ukopenrecords@uky.edu](mailto:ukopenrecords@uky.edu)

---

Contact Direct Supervisor immediately, Stacy Miller and Tim West.

---

Please know that we have a very short period to respond.

# Wrap Up



Plans to expand this session to include even more relatable situations.



The Roundtable is consistently the highest rated evaluation topic presented at New Agent Orientation.



This is a practical approach to helping our New Agents.



Questions??

- Thank you for joining us today.
- If anyone would like a copy of our full presentation for your own modification and use, or you have further questions feel free to contact any of us:

Daniel Wilson – [daniel.wilson@uky.edu](mailto:daniel.wilson@uky.edu)

Natasha Lucas – [nlucas@uky.edu](mailto:nlucas@uky.edu)

Jeremy Teal – [jteal@uky.edu](mailto:jteal@uky.edu)



# AND JUSTICE FOR ALL

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Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, and American Sign Language) should contact the responsible State or local Agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form, which can be obtained online, at [www.usda.gov/sites/default/files/documents/usda-program-discrimination-complaint-form.pdf](http://www.usda.gov/sites/default/files/documents/usda-program-discrimination-complaint-form.pdf), from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

**mail:**  
U.S. Department of Agriculture  
Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410; or

**fax:**  
(833) 256-1665 or (202) 690-7442;

**email:**  
[program.intake@usda.gov](mailto:program.intake@usda.gov).

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La información del programa puede estar disponible en otros idiomas además del inglés. Las personas con discapacidades que requieran medios de comunicación alternativos para obtener información sobre el programa (por ejemplo, Braille, letra agrandada, grabación de audio y lenguaje de señas americano) deben comunicarse con la agencia estatal o local responsable que administra el programa o con el TARGET Center del USDA al (202) 720-2600 (voz y TTY) o comunicarse con el USDA a través del Servicio Federal de Transmisión de Información al (800) 877-8339.

Para presentar una queja por discriminación en el programa, el reclamante debe completar un formulario AD-3027, Formulario de queja por discriminación del programa del USDA, que se puede obtener en línea, en [www.usda.gov/sites/default/files/documents/usda-program-discrimination-complaint-form.pdf](http://www.usda.gov/sites/default/files/documents/usda-program-discrimination-complaint-form.pdf), en cualquier oficina del USDA, llamando al (866) 632-9992, o escribiendo una carta dirigida al USDA. La carta debe contener el nombre, la dirección y el número de teléfono del reclamante, y una descripción escrita de la supuesta acción discriminatoria con suficiente detalle para informar al Subsecretario de Derechos Civiles (ASCR, por sus siglas en inglés) sobre la naturaleza y la fecha de la presunta violación de los derechos civiles. La carta o el formulario AD-3027 completado debe enviarse al USDA por medio de:

**correo postal:**  
U.S. Department of Agriculture  
Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410; o'

**fax:**  
(833) 256-1665 o' (202) 690-7442;

**correo electrónico:**  
[program.intake@usda.gov](mailto:program.intake@usda.gov).

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Reasonable accommodation of disability may be available with prior notice.

Program information may be made available in languages other than English.

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- Equal Opportunity Office, Martin-Gatton College of Agriculture, Food and Environment, University of Kentucky, Room S-105, Agriculture Science Building Lexington, Kentucky 40546
- UK Office of Institutional Equity and Equal Opportunity, 13 Main Building, University of Kentucky, Lexington, KY 40506-0032
- US Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410

*Do You Measure Up?*

**How Organizational Health Attracts & Retains Top  
Talent in Extension**



2024 SR-PLN Virtual Pre-Event

**SR-PLN**

Program & Staff Development Committee

**August 7, 2024**

# Introductions



**Brandi Berven**  
Extension Specialist  
Staff Development  
University of Tennessee Extension



**Cindy Canfield**  
Extension Human Resources Manager  
Alabama A&M University



**Dr. Meggan Franks**  
Manager of Reporting  
& Program Impact  
LSU AgCenter



**Hannah Gerken**  
Extension Program Specialist  
Employee Development  
Texas A&M AgriLife Extension Service



**Dr. Lauren Hargrave**  
Program Evaluation &  
Accountability Specialist  
North Carolina A&T Extension



**Dr. Tearney Woodruff**  
Assistant Professor & Extension Specialist  
Employee Development  
Texas A&M AgriLife Extension Service

# Extension & Retention

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## Retention & Turnover Crisis

- Overall, one third of higher ed employees are very likely or likely to look for new employment opportunities in the next year (CUPA-HR 2023 Higher Education Employee Retention Survey).
- Turnover in Extension employees is considerably higher than public workforce (Benge & Harder, 2017).
- Challenges of Extension Employees – Burnout, Unrealistic Expectations (Benge et al., 2015), and Lack of Resources (Feldhues & Tanner, 2017)
- Agent Turnover Cost Estimation: \$80,000 per employee (Kutilek, 2000)

# Origin of the Project

---

## SR-PLN Program & Staff Development Committee

- Discussion of the challenging employment environment in Fall 2022 at the Annual SR-PLN Meeting
- Strategic steps to stay competitive to attract and retain new talent and improve the experience of current employees (Lee, Pasquarella, Diego De La Peza, Lizano, & Santoro, 2022)
- Question Raised: How do you determine what a healthy organization looks like from the perspective of the employees and the leaders?
- Curious about potential overlaps and/or gaps that can be addressed to improve culture & the employee experience
- Sought to create an instrument that could collect both perspectives & mitigate cost as an inhibitive factor for understanding culture of an organization

# Organizational Health Scorecard

## **The Check-Up**

A scorecard/checklist of organizational health standards for leadership to reflect on and to utilize in prioritizing efforts.

## **The Comprehensive Exam**

An evaluation for agencies to gain a better understanding of the employee experience.

## **The Prescription**

Recommendations for best practices and links to resources.

# The Process

---

## Survey Development, Analysis and Validation

- Implemented an 8-step framework for scale development ( DeVellis, 2012)
  - Determined what to measure (Org. Health themes)
  - Developed items
  - Determined Likert-type rating scale
  - Received feedback from experts (peer-reviewed)
  - Validated the items (i.e., content, face, discriminant, convergent validity)
  - Piloted the survey
  - Evaluated the items (i.e., factor analysis (EFA & CFA), reliability and validity analysis)
  - Determined the final structure
    - Final instrument contains 11 themes and 57 items total (down from 116 items)

# What's Next?

---

- Initial article will be submitted to the Journal of Extension (JOE) with information on accessing a downloadable survey.
  - Article focuses on the process of utilizing the Comprehensive Exam tool.
  - As an institution, you can determine what format is best for your workforce (ex. Qualtrics, paper).
- Further research topics/articles include:
  - Deeper analysis of the research and validation method
  - Utilization of the full-suite of the Organizational Health Scorecard (comprehensive exam, leadership check-up, and prescriptions)





# *Questions?*



Please reach out to Tearney Woodruff at  
[tearney.woodruff@ag.tamu.edu](mailto:tearney.woodruff@ag.tamu.edu) with questions.

# Sources

---

- Benge, M. & Harder, A. (2017). The Effects of Leader-Member Exchanges on the Relationships Between Extension Agents and County Extension Directors in Florida. *Journal of Human Sciences and Extension*, 5(1), 35-49.
- Chandler, G. D. (2004). *Organizational and individual factors related to retention of county Extension agents employed by Texas Cooperative Extension*. Texas A&M University.
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- Nikolopoulou, K. (2023). What Is Convergent Validity? | Definition & Examples. Scribbr.  
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# “Welcome to Extension!”

## Tales from the NC State Extension team

Eleanor Baker, Extension Organizational Development Program Associate

Dave Herpy, Extension Organizational Development Coordinator

Susan Kelly, Assistant Extension Director for County Operations

Nikki Kurdys, Assistant Extension Director, HR and Operational Strategy

# Extension By the Numbers



**101**

Local Centers



**1,000+**

Experts



**200+**

Websites

**\$2.1B**

Extension's annual economic  
impact on North Carolina



**27-1 ROI**

Economic return on  
government investments

**1** TRUSTED SOURCE FOR  
NORTH CAROLINIANS

# Finding our People - Recruitment

## Historically

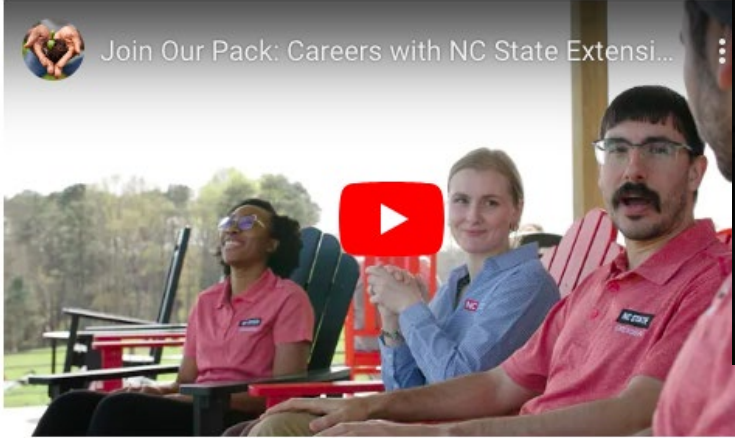
- Large hiring pools
- Employees seeking a career with Extension
- Very little formal recruitment

## Present

- Smaller groups of applicants for positions
- Not necessarily planning to stay entire career
- More intentional recruitment needed

# Recruitment Successes

- Job fairs at universities with related degree paths (ex. talking to students with education majors for 4-H, nutrition and food science for FCS, etc.)
- Building awareness of Extension with high school youth through the state FFA convention
- Attending national conferences - MANRRS, PPA, etc.
- Targeted hiring campaigns with materials from our Marketing and Communications team



Join Our Pack: Careers with NC State Extensi...

**NC STATE**  
EXTENSION

**WE ARE HIRING!**

Help Guide the Leaders of Tomorrow

**APPLY HERE:**  
[go.ncsu.edu/ExtensionJobs](http://go.ncsu.edu/ExtensionJobs)



**NC STATE** EXTENSION

**WE ARE HIRING!**

Become an Agent of Change

**APPLY NOW:**  
[go.ncsu.edu/ExtensionJobs](http://go.ncsu.edu/ExtensionJobs)

**Plant the Seeds for Your Future**

**Summer Internships Statewide**

- > Paid + Full-time
- > 10-Week Sessions
- > College Credit Available
- > Open to Undergrads + Grads

# Onboarding Challenges

Major onboarding challenges we heard consistently during 2023 listening session tour of 12 counties across NC:

- Information overload in the first several months
- Communication breakdown between state and counties
- Inconsistent support from supervisors, mentors - whose role is onboarding?



# Onboarding Successes

- Detailed onboarding process emails sent each month to CEDs with new hires
- Automated emails to new employees on Day 1, Week 1, Week 2-4 to space out onboarding information
- Formal mentor in a similar position/nearby county assigned within first month

# Onboarding Successes

- Self-guided Extension Onboarding Moodle course to meet training needs on demand.
- Two day, in-person general onboarding training offered biannually to reach each new employee within 6 months of hire. Continuation of asynchronous training, opportunity to build relationships with peers and campus-based personnel.

# THANK YOU!

Eleanor Baker, EOD Program Associate

[eafrede2@ncsu.edu](mailto:eafrede2@ncsu.edu)

Office: 919-515-9516

Cell: 828-448-7506

Dave Herpy, EOD Coordinator

[djherpy@ncsu.edu](mailto:djherpy@ncsu.edu)

Office: 919-515-3387

Cell: 440-537-3658



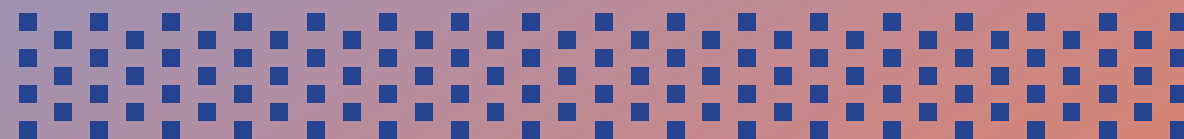
**NC** COOPERATIVE  
EXTENSION



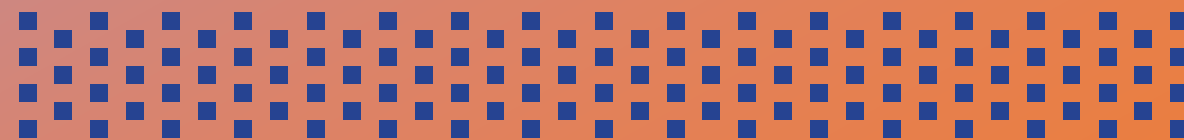
N.C. A&T  
STATE UNIVERSITY

NC STATE  
UNIVERSITY

# Regional Director Roundtable

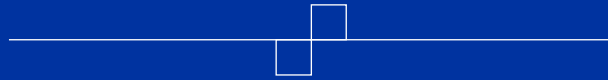


 Cooperative  
Extension Service



**Martin-Gatton College of Agriculture, Food and Environment**

# **Regional Director Roundtable**




**Natasha Lucas-Central Region Director**

**Jeremy Teal-West Region Director**

**Daniel Wilson-East Region Director**



# Situational Discussions during Lunch

- Will post a scenario and we will give you a couple of minutes to think about it then we will discuss as a group.
  - We are here to learn so please take a shot at the answer even if you don't know for sure.
  - Some of these might be not in your program area but can be related.
- 



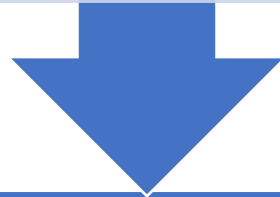
# Scenario #1

- Your county is planning to take producers to the KY Beef Bash, currently you have 10 farmers wanting to go. A full office van load that one agent can drive them to.
  - How do you plan for this trip?
  - What forms do you fill out?
  - Do you need to take out Excess Medical Insurance as precautionary?

# Scenario #1 Answer

You would need to complete a Risk Management Plan.

**Make sure you do a county itinerary.**



Excess Medical would be required if the event was strenuous or had an added risk to it. Example Chute Side BQA Training, hands on activities.



# Risk Management Plan

- Link that takes you to the plan:
- [https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/risk\\_mgmt%20fillable\\_plan\\_template\\_final.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/risk_mgmt%20fillable_plan_template_final.pdf)



University of Kentucky  
College of Agriculture,  
Food and Environment  
Cooperative Extension Service

## RISK MANAGEMENT PLAN TEMPLATE FOR PROGRAMS, EVENTS AND ACTIVITIES

*The following is to be used when planning an event to ensure that all necessary steps and precautions to manage risks have been taken.*

1. **Name of group** \_\_\_\_\_
2. **Date and Location of event** \_\_\_\_\_
3. **List the learning objectives and opportunities** that will take place with this program.  
\_\_\_\_\_  
\_\_\_\_\_
4. **Name and contact information for each person (staff and volunteer)** providing leadership for the program, event or activity. \_\_\_\_\_
5. **Name and contact information of specialist** involved with this event. \_\_\_\_\_
6. **List all volunteers** that will be involved in the program, event or activity, along with their **contact information** and indicate that they have **completed the entire screening protocol** and have **been accepted** if applicable. \_\_\_\_\_
7. **List steps** that will be followed prior to program, event or activity to **ensure a safe learning environment**. \_\_\_\_\_
8. **Determine the medical accessibility** (medical facilities) and **protocol** in case of **medical emergency**. \_\_\_\_\_
9. **First Aid Kit**. Name the designated person responsible for the First Aid Kit. \_\_\_\_\_
10. Identify the **mode of travel** and considerations. \_\_\_\_\_
11. **Supporting Documents:**
  - a. Attach an **Emergency Action Plan**, detailing emergency telephone numbers for participants to call in case of emergency and designate a location for the group to meet in case group gets separated.
  - b. Attach **itinerary** or program outline.
  - c. Attach a copy of the **lease, rental agreement** or copies of the tickets.
  - d. Attach an **Out-of-state travel** request if applicable.
12. Obtain accident and other insurance for the event. Insurance information can be found at <http://ces-manuals.ca.uky.edu/content/office-procedures-insurance>
  - a. Take copies of the Insurance Claims Forms for the event while in travel status.
  - b. Take copy of the carrier's insurance policy.
  - c. Take copies if the incident forms for the event.
13. Secure **participation information** and take copies to the event.
14. Follow all travel policies.
  - a. Extension guidelines are located at <http://ces-manuals.ca.uky.edu/content/travel>
  - b. University policies are located at <http://www.uky.edu/EVPPFA/Controller/BPM.htm>

# Excess Accident Medical Insurance

- <https://www.uky.edu/administrativeservices/insurance>
- UK Version is for Youth only.

The screenshot displays the CampusConnexions website interface. At the top left is the logo for CampusConnexions with the tagline "Your connection to custom insurance solutions." At the top right, the customer service number "1-866-838-9536" is listed. The main heading is "EXCESS ACCIDENT MEDICAL INSURANCE" followed by the sub-heading "ELIGIBILITY GUIDELINES". The central content area contains a paragraph stating eligibility criteria and a numbered list of three points: 1. Activity/Camp sponsorship by University personnel; 2. Activity/Camp types (summer camp, sports, field trip, etc.); 3. Ineligible Activities/Camps (Athletics Department, student organizations, etc.). A checkbox links to a "Continue" button. On the right side, there is a "Quick Links" section with a "Policy Highlights" link.

**CampusConnexions**  
Your connection to custom insurance solutions.

Customer Service : 1-866-838-9536

## EXCESS ACCIDENT MEDICAL INSURANCE

### ELIGIBILITY GUIDELINES

You are eligible to apply for the Excess Accident Medical Insurance if you meet the Activity/Camp Eligibility Guidelines below:

1. The Activity/Camp must be sponsored by the University and supervised by University personnel. Essentially, a University department must take responsibility for the organization, hosting, and (usually) funding of the activity.
2. The Activity/Camp must be one of the following: summer camp, sports activity, field trip, activity involving participants under age 18, or an activity involving more risk than would typically be expected in an academic learning setting (i.e. rock climbing, snow skiing, workshops with power tools, youth livestock show).
3. Ineligible Activities/Camps:
  - a. University of Kentucky Athletics Department Activity/Camp insurance is managed through a separate policy.
  - b. Student organization activities.
  - c. Activities held on University property but operated by an outside organization.

Click here if you satisfy the eligibility guidelines above.

[Continue](#)

**Quick Links**  
[Policy Highlights](#)

# Excess Medical Insurance for Adults – Example

- American Income Life
- <https://www.ailife.com/Pdfs/documents/Extension%20Group%20Policy%20Application.pdf>



AMERICAN INCOME LIFE  
insurance company

SPECIAL RISK  
DIVISION

PO BOX 50158 • INDIANAPOLIS, IN • 46250

Phone: 800-849-4820

[www.AILspecialrisk.com](http://www.AILspecialrisk.com)

Fax: 317-849-2793

## Application for Extension Group Annual Accident Coverage

Name of Group \_\_\_\_\_

Name of Leader \_\_\_\_\_

List Projects \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ County \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Desired Effective Date \_\_\_\_\_

Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

Has this group had one of our annual policies within the last year? Yes  No

# of Regular Members \_\_\_\_\_ X \$1.00 = \$ \_\_\_\_\_

# of Regular Leaders \_\_\_\_\_ X \$1.00 = \$ \_\_\_\_\_

# of Horse\* Members \_\_\_\_\_ X \$2.00 = \$ \_\_\_\_\_

# of Horse\* Leaders \_\_\_\_\_ X \$2.00 = \$ \_\_\_\_\_

TOTAL ENCLOSED: \$ \_\_\_\_\_  
*(\$10.00 minimum)*

As authorized leader of the above group I request that a Master Policy be issued on the effective date requested, or on the date this application is received, whichever is later. We are enclosing a check or money order payable to the American Income Life Insurance Company, PO Box 50158, Indianapolis, IN 46250, calculated at the rate of \$1.00. \*(\$2.00 – horse, motorcycle/ATV & team sports) for each person to be covered.

SIGNED \_\_\_\_\_

Are Leaders to be insured? Yes  No

If "Yes," list names (attach additional pages if needed):

\_\_\_\_\_



FOR HOME OFFICE USE ONLY

Policy # \_\_\_\_\_

Issue Date \_\_\_\_\_


Date Received \_\_\_\_\_

Form 103-86 Revised 6/2019



## Scenario #2

- You are planning a large program and you go to Wal-Mart to purchase supplies from your Program Support funds using your personal credit card. You used your tax-exempt form at checkout (the supplies totaled \$150.00). You put the receipt in your vehicle, and then went to conduct the program. The next morning you start to complete your office reimbursement forms for the program, and you notice that you cannot find the Wal-Mart receipt for \$150.00, after looking everywhere the entire day the receipt is still missing.
- What do you do?



## Scenario #2 Answer

You have to obtain an actual receipt for reimbursement for all transactions.


So you will have to go to Wal-Mart and get them to reprint the receipt.

---



# Scenario #3

- You are at the grocery store on a Friday night, after work hours with your family. A community resident comes up, introduces himself or herself, and immediately starts asking you about something work related. After 5 minutes, they bring up another topic that is work related.
  - How do you handle this situation?
  - How do you encourage this community member to contact you during work hours and follow up in the appropriate manner?



## Scenario #3 Answer

This will be situational, but you should always encourage them to contact you during your work hours if there is anything that you need to refer.

Also, please note that we need to be receptive to our clientele's needs.

---



## Situation #4

- Your county office is having their monthly homemaker meeting, there are 20 members present at this program. As the homemakers start to leave, the last one out the door trips and falls and cannot get up.
- What do you do?
- Who do you call?
- Are there any forms to fill out?





# Scenario #4 Response

First thing is to contact  
the local emergency  
authorities,  
ambulance, etc.

Then contact your  
direct supervisor.

Forms to Fill out=?

---

# Employee, Volunteer and Youth Accident/Incident Report Form

[https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident\\_report\\_form\\_oct\\_2017.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident_report_form_oct_2017.pdf)

## Employee, Volunteer & Youth Accident/Incident Report Form

**This incident report form is intended to record accident/ incidents of employees, volunteers and campers.**

This incident report is required for serious illnesses; significant behavioral problems; or incidents involving injuries such as fractured bones, chipped or broken teeth, extensive lacerations involving sutures, falls involving unconsciousness, dislocations, incidents involving water which require resuscitation, or any injury requiring a hospital stay. This incident report is **NOT** required for incidents such as scrapes, bruises, sprains, etc.

**Volunteers and campers are not employees of the University of Kentucky and volunteering for Cooperative Extension Service is not a contract for employment.**

**Attention: Employees injured during the course and scope of employment should report accidents/injuries to UK Workers Care, 1-800-440-6285 in addition to completing this form. These notes will provide a useful history of events.**

County Extension Service office \_\_\_\_\_ Date of report \_\_\_\_\_

Extension employee \_\_\_\_\_

Address of office \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name of injured or involved person(s) \_\_\_\_\_ Age \_\_\_\_\_ Sex \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name of injured or involved person(s) \_\_\_\_\_ Age \_\_\_\_\_ Sex \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name of Parent or Guardian (if minor) \_\_\_\_\_ Sex \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Name/Addresses of witnesses (Each witness should attach a signed statement of what happened.)

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

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

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

Type of incident:  Behavioral  Accident  Illness  Other

Date of incident: Time \_\_\_\_\_ (a.m. or p.m.) Date \_\_\_\_\_ Month \_\_\_\_\_ Year \_\_\_\_\_

Describe the incident in detail (use additional pages; if necessary)

\_\_\_\_\_

# Employee, Volunteer and Youth Accident/Incident Report Form

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[https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident\\_report\\_form\\_oct\\_2017.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident_report_form_oct_2017.pdf)

Location of incident and diagram showing objects and persons

What activity was the injured participating in at the time of the incident?

Describe any equipment involved in the incident

Describe emergency procedures followed as a result of this incident

---

Medical Report of Incident

Were the parent(s) or guardian notified? Yes No How? \_\_\_\_\_

By whom? \_\_\_\_\_ Title \_\_\_\_\_ When \_\_\_\_\_

Response of individual notified: \_\_\_\_\_

Where was treatment given? ON site Doctor's office/clinic Hospital Rescue squad

Describe treatment given: \_\_\_\_\_

Treatment given by whom? \_\_\_\_\_ Date of treatment: \_\_\_\_\_

Was injured retained overnight in hospital? Yes No If yes, where? \_\_\_\_\_

# Employee, Volunteer and Youth Accident/Incident Report Form

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[https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident\\_report\\_form\\_oct\\_2017.pdf](https://ces-manuals.ca.uky.edu/sites/ces-manuals.ca.uky.edu/files/incident_report_form_oct_2017.pdf)

Name of attending physician \_\_\_\_\_

Physician's recommendation at the time of report  
\_\_\_\_\_

Comments  
\_\_\_\_\_

Other persons notified: (county agent, district director, camping specialist, Ass't. Director of 4-H)

Name	Position	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____

Person completing report:

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_



# Scenario #5

- You take a picture of a group of children that participated in your 4-H Reality Store program, it was one of the best programs that you have ever presented. In every picture there is a particular youth that you do not have photo release permission on file.
  - What do you do?
  - Could you use the pictures without the photo release form?

# Scenario #5 Answer

You could ask the student/parent to fill out the photo release form.



No, you can never use a photo without a photo release form.



Remember 4-H enrollment forms also have the photo release built in.

# Photo Release Forms

[https://communications.ca.uky.edu/sites/communications.ca.uky.edu/files/photo-image consent form acs%5B89%5D.pdf](https://communications.ca.uky.edu/sites/communications.ca.uky.edu/files/photo-image%20consent%20form%20acs%5B89%5D.pdf)



H-328 Authorization to Obtain/Utilize Image  
College of Agriculture, Food and Environment  
Kentucky Cooperative Extension Service

Name: \_\_\_\_\_  
 Professional Title: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

Send copy of form to:  
University of Kentucky  
Agricultural Communications S  
131 Scovell Hall  
Lexington, KY 40546-0064

### ADULT

General Use  Specific Project: \_\_\_\_\_

I, (print full name) \_\_\_\_\_, being eighteen (18) years of age or over, hereby grant permission to the University of Kentucky and its affiliates and subsidiaries, including but not limited to the UK Alumni Association, UK Athletics Association, and UK Research Foundation, to interview, photograph, and/or videotape me; and/or to supervise any others who may do the interview, photography, and/or videotaping; and/or to use and/or permit others to use information from the aforementioned interview and/or the aforementioned images in educational and promotional activities for the following without compensation:

- Please check all that apply:
- UK Educational Publications/Videos
  - UK Electronics Publishing (e.g., World Wide Web)
  - UK Promotion/Advertising
  - Local/Regional/National News Media (w/permission of UK)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Signature

Witness: \_\_\_\_\_ Date: \_\_\_\_\_  
 Signature

### MINOR CHILD

General Use  Specific Project: \_\_\_\_\_

I, (print full name) \_\_\_\_\_, hereby grant permission to the University of Kentucky and its affiliates and subsidiaries, including but not limited to the UK Alumni Association, UK Athletics Association, and UK Research Foundation to interview, photograph, and/or videotape my minor child, \_\_\_\_\_, and/or to supervise any others who may do the interview, photography, and/or videotaping; and/or to use and/or permit others to use information from the aforementioned interview and/or the aforementioned images in educational and promotional activities for the following without compensation:

- Please check all that apply:
- UK Educational Publications/Videos
  - UK Electronics Publishing (e.g., World Wide Web)
  - UK Promotion/Advertising
  - Local/Regional/National News Media (w/permission of UK)

Signature of Parent or Guardian: \_\_\_\_\_ Date: \_\_\_\_\_  
 Signature

Relationship: \_\_\_\_\_

Witness: \_\_\_\_\_ Date: \_\_\_\_\_  
 Signature



### 4-H Participant Information/Enrollment Form (NOT FOR RESIDENTIAL CAMP)

Note: The form must be completed by the participant and/or parent or guardian in order to participate in the 4-H program. All items be completed, even if the response is not applicable - indicate by using N/A (i.e. no health insurance). Failure to complete this form entirely will result in the person being ineligible to participate in 4-H activities. Please print in blue or black ink to allow for photocopying.

Name: \_\_\_\_\_ County/District: \_\_\_\_\_  
 Last First  
 Address: \_\_\_\_\_ Birth date: \_\_\_\_\_ Age: \_\_\_\_\_ Youth  Adult  Female  Male   
 City: \_\_\_\_\_ State: KY Zip: \_\_\_\_\_ Email: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Farm:  Yes  No  
 Race:  Asian  White  Black  American Indian  Hawaiian & Pacific Islander  Hispanic  Non-Hispanic Grade: \_\_\_\_\_  
 Emergency Contact #1: \_\_\_\_\_ Phone  H  W  C \_\_\_\_\_ Phone  H  W  C \_\_\_\_\_  
 Emergency Contact #2: \_\_\_\_\_ Phone  H  W  C \_\_\_\_\_ Phone  H  W  C \_\_\_\_\_  
 Name of Family Doctor: \_\_\_\_\_ Doctor's Phone: \_\_\_\_\_  
 Health Insurance Company: \_\_\_\_\_ Policy #: \_\_\_\_\_  
 Name of Policy Holder/Relationship to Participant: \_\_\_\_\_ Member ID: \_\_\_\_\_

### HEALTH HISTORY

Does the participant have, or at any time has had, any of the following? Check "Yes" or "No" to each item. Please explain any answers (noting the number of the item) in the space below or on an additional sheet if necessary. Reporting conditions will prevent a person from attending and will be kept confidential.

- Yes/No
- 1) Asthma  Yes  No
  - 2) Bronchitis  Yes  No
  - 3) Convulsions  Yes  No
  - 4) Diabetes  Yes  No
  - 5) Ear infection  Yes  No
  - 6) Fainting  Yes  No
  - 7) Heart Condition  Yes  No
  - 8) Headaches  Yes  No
  - 9) Hypoglycemia  Yes  No
  - 10) Serious Allergy to Insects  Yes  No
  - 11) Wear Glasses/Contacts  Yes  No
  - 12) Other Conditions  Yes  No
  - 13) Drug Allergy (please explain)  Yes  No
  - 14) Food Allergy (please explain)  Yes  No
  - 15) Other Allergy (please explain)  Yes  No

Please Explain Any "Yes" Responses:

List and explain any restrictions (dietary, physical, etc):

The following over the counter medications may be administered to my without contacting me:

- Antihistamine Pill
- Acetaminophen (Tylenol)
- Antacid
- Decongestant
- Ibuprofen (Advil)
- Dramamine
- Laxative
- Painkiller

### MEDICAL TREATMENT

All information provided on this form is correct and complete to the best of my knowledge. This person has permission to engage in all events activities. I hereby give permission to the event designer to provide routine health care, administer prescription and over the counter medication and seek emergency medical treatment if warranted. I agree to the release of all records necessary for medical treatment, billing or insurance. In the event I cannot be reached in an emergency, I give permission to the attending physician to secure and administer treatment, including hospitalization. SIGNATURE OF PARENT/PARTICIPANT: \_\_\_\_\_ DATE: \_\_\_\_\_

### PUBLICITY RELEASE

I hereby grant the 4-H program, University of Kentucky and their agents, the right to use, reproduce, assign and/or distribute still pictures, video sound recordings of myself or my minor child without compensation for use in promotion, advertising, educational publications or online content.

SIGNATURE OF PARENT: \_\_\_\_\_  NO, I do not permit.



# Scenario #6

- You have a fall Field Day planned for October 1st, this is the biggest interoffice program of the year for your county. Once you have the Field Day planned with all guests and guest speakers invited, there is an In-Service Training that is scheduled on the same date. This in-service completes your Core Training requirements as a new agent, and if you miss it you will have to wait another 6 months before it is offered again. This training will take place 3 hours away from your county and from your field day location, and you cannot attend both.
- What do you do?



## Scenario #6 Answer

The main thing is to work with your Director on this situation to gain their approval for any direction.

What does your gut/heart tell you that you should do?



# Scenario #7

- You are the only agent in the office and all of the staff/program assistants are out of the office helping with a program. A prominent community member comes into the office irate about the new Extension Office tax rates. They are visibly upset, with a raised voice tone and they are communicating strongly with their arms.
  - What do you do?
  - How do you handle this situation?

# Scenario #7 Answer

1

First off, if you ever feel threatened or unsafe with anyone you should call the authorities immediately.

2

State that you will take the individuals concerns down and contact your supervisor immediately. You can also give them your Directors contact information as well.

3

You can also give them the contact information of the EDB members who set the tax rates in the county.



# Scenario #8

- You are at a high school volleyball game after work hours in your work county; a parent who works away during the week comes up and tries to turn in Krispy Kreme Doughnut Fundraiser money to you (\$75.00 cash) because they are never in town during the Extension Office hours.
  - How do you handle this request?
  - If you choose to accept the money that night, how would you handle the money and documentation?




# 3 Options if you decide to take the Money

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- 1. Agent keeps a receipt book handy and writes a receipt for that money and gives the receipt to the parent. The agent would then secure the money and bring into the office the next day and have someone verify the amount, initial the receipt and it would go into the safe to be deposited like any other.
- 2. Agent would give the parent an addressed and stamped envelope for the money to be mailed in (suggested to mail a check only) to the office where it will be documented properly when it comes in and deposited like any other.
- 3. Offer to open the office early one morning or to stay late one evening to accept the money from the parent.



## Scenario #9

- You are in the office and a community member walks in asking for printed financial records for the past 5 years for the County Extension District Board (bank statements, reconciliations, and budgets).
  - Is this an Open Records request situation? If so, what do you do?
  - Can you give them the documents or would that come through UK?
- 

# Scenario #9 Answer

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This would definitely be an Open Records request situation.

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Request must be given in writing to make it official.

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Send the request to [ukopenrecords@uky.edu](mailto:ukopenrecords@uky.edu)

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Contact Direct Supervisor immediately, Stacy Miller and Tim West.

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Please know that we have a very short period to respond.



Questions??

- Thank you for your participation today.
  - The link to this PPT will be shared with you after today's session.
- 



# AND JUSTICE FOR ALL

In accordance with Federal law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, disability, and reprisal or retaliation for prior civil rights activity. (Not all prohibited bases apply to all programs.)

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**mail:**

U.S. Department of Agriculture  
Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410; or

**fax:**

(833) 256-1665 or (202) 690-7442;

**email:**

[program.intake@usda.gov](mailto:program.intake@usda.gov).

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**correo postal:**

U.S. Department of Agriculture  
Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410; o'

**fax:**

(833) 256-1665 o' (202) 690-7442;

**correo electrónico:**

[program.intake@usda.gov](mailto:program.intake@usda.gov).

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- UK Office of Institutional Equity and Equal Opportunity, 13 Main Building, University of Kentucky, Lexington, KY 40506-0032
- US Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410



# WORDS OF WISDOM FOR EXTENSION MIDDLE MANAGERS

Second Edition

2016

A Publication of the Southern Region Middle  
Managers Committee

<http://srpln.mstate.edu/pln.html>

# Introduction

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## 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 first took on as part of their Plan of Work for 2011 - 2012.

As part of the 2015-2016 Plan of Work, revisions and updates were planned for the existing document and a committee was charged with updating this resource during the Middle Manager's Committee sessions at the 2015 Southern Region Program Leadership Network Meeting in Orlando, FL.

Questions were routed to all Southern Region Middle Managers for input. 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 2016 PLN Meeting in Nashville, TN and reflects their input.



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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# Table of Contents

Questions on the following topics were routed to all Southern Region Middle Managers for input. Responses are organized by topic and compiled with edits.

## 1 Hiring

Describe any traditional and/or non-traditional strategies your institution has used for recruitment of Extension staff.

## 2 New Agent Training

Describe any formal or informal new agent training techniques that exist within your organization. Link to resources.

## 3 Performance Appraisal

What methods are used to reward excellent performance through your institutions performance appraisal process?

What are some strategies for dealing with difficult or unsatisfactory performance appraisals?

## 4 Supervision

What strategies must middle managers deploy to ensure staff accountability on a regional and/or mobile basis?

What communication techniques must middle managers use to ensure organized engagement?

## 5 Stakeholder Relationships

Describe any Best Management Practices or creative ideas for the cultivation of new and existing stakeholder relationships.



## 6 Leadership Resources

List any helpful resources or programs utilized in support of leadership development.

## 7 Financial

Describe some strategies utilized to enhance local support for Extension operations.

Describe any creative/ non-traditional funding arrangements that may be deployed in support of Extension projects and/or programs.

## 8 Marketing Extension

What creative strategies are used to market Extension programs to non-traditional users?

## 9 Technology

Are there any new technologies that have enabled more effective communication either inside or outside of the organization?  
Are there drawbacks to new or emerging technologies that are being used by Extension personnel and stakeholders?

## Describe any traditional and/or non-traditional strategies your institution uses for recruitment of Extension staff.

- ✓ We use traditional methods and have increased digital recruitment efforts.
- ✓ Attend University career fairs.
- ✓ Candidates are directed to an online application system. Several job search engines are used to advertise - Monster, CareerBuilder, Inside Higher Ed Professional Journals and Professional Organizations.
- ✓ Traditional recruitment strategies such as internships, positions announcements on job boards, advertisement in professional journals and local media sources seem to be the most fruitful when identifying prospective employees.
- ✓ All vacant agent positions are opened for internal transfer for seven days prior to advertising through traditional methods. For the past 5 years Virginia Cooperative Extension has sponsored approximately 30 summer interns and this program has resulted in the hiring of about 5 to 10 new extension agents who participated in the summer intern program.
- ✓ We participate in job fairs, and speak to classes routinely. We also offer approximately 30 paid internships throughout the year, most during the Summer as a recruitment tool. We do involve Agents on District based Recruitment Committees and ask them to help at job fairs and to speak to classes as often as possible.
- ✓ Work with College and Universities with the degree we are looking to hire. Building relationship with the department heads and have them assist you in finding good students for our agency.
- ✓ Job openings are placed on GreatJobs website. Presentations are given at Universities/Colleges on Career Opportunities with Extension Participation in job fairs in urban areas.
- ✓ County Agents are hired by District Directors. County program assistants and



secretaries are hired by the County Staff Chair. No recruitment efforts.

- ✓ We try to attend career days at local Universities in the area. We split up and cover our own area of the state. I've established some key relationships with the deans in FCS and ANR schools in the state. I usually drop them an email when we have positions available. This has been a great source for excellent candidates.
- ✓ Web posting.
- ✓ Kentucky - We make extensive investment in our Extension Summer Intern Program. This gives both potential employee and potential employer a chance to take a look at each other. Approximately 30% of current agents were also Extension Summer Interns.

## What method of interviewing applicants has worked well for you?

- ✓ I use a diverse, 5-person search committee with a follow-up phone interview. Prior to the interview and after candidates are screened by HR - the search committee rates the applicants.
- ✓ I ask each applicant to make a 10- minute Power Point presentation on a pre-determined relevant Extension Education program topic, as part of the interview process.
- ✓ Candidates present a 15-minute seminar on the program area they are applying for. We invite internal staff and key stakeholders

(advisory leaders, county partners) to this part. An interview team of the DED, CED, State Program Leader or Extension Specialist, and sometimes someone from the County HR to ask behavior-based questions for 30 minutes.

- ✔ Though our recruitment methods may be considered traditional (i.e. journals, job boards, online posting, etc.), we are utilizing technology to an increasing degree to offer interviews for candidates in other areas of the country. Media platforms such as SKYPE are used to reduce the number of in person interviews that are conducted. In person interviews are expected of local candidates and offered to all out of state candidates in addition to nontraditional web based interviews
- ✔ We have recently begun asking applicants to give a brief presentation on the subject of their choice. This not only gives insight into the applicant's ability to deliver effective presentations, but also how comfortable the applicant will be in an agent role. We have also found that the interview process goes a little quicker as the presentation serves as a good icebreaker.
- ✔ The use of a first-round telephone interview process has nearly eliminated bringing weaker candidates to the face to face local interview. All local interviews are conducted as a panel interview with representatives from VIRGINIA COOPERATIVE EXTENSION and local



government. All candidates prepare and deliver a presentation on a topic requested by the District Director.

- ✔ We try to focus interviews on behavioral questions and place the applicant in scenarios that make he/she think. This sometimes helps to avoid the practiced, canned answers that they are conditioned to give. When possible, we involve the District Administrator as the lead, but also include the Regional Program Leader and the local staff, at least in a second interview.
- ✔ Use a consistent list of questions that causes the applicants to think and process before answering.
- ✔ We use a standard set of questions developed by Extension to conduct in person interviews and Skype interviews.
- ✔ Generally, face to face at the county office - District Director and county staff chair.
- ✔ I prefer conducting personal interviews in the county office where the vacancy is located. I think this is much better than interviewing in the regional/district office. I have found phone interviews to be useful in initial screening but not effective when trying to identify a primary candidate. ZOOM has proved to be excellent for interviewing candidates from far away locations. Much better than phone interviews!
- ✔ I have begun requiring applicants to make a 10-minute power point presentation during the interview, on a relevant topic to their position for which they are applying.
- ✔ We use Go to Meeting. Because writing is so important we request that the candidate be involved in a short writing assignment, giving them an Extension publication and asking them to write a 300-500 word "web post" they have internet access during the 50-minute exercise, most of the time it gives good evidence to confirm selection of top candidates.

- ✓ Kentucky - We use a multi-level interviewing system. Our HR Personnel Director conducts phone interviews and narrow potential candidates (2-4) for face to face interviews. The face to face interviews are conducted with 4-5 people and we have recently added a 5-10 minute presentation/demonstration to the face to face interview, which we really like.



### Any tips on checking references on applicants?

- ✓ It seems that looking for people to call that are not listed has worked well for me; supervisors listed but not on the reference list.
- ✓ Use a University Telephone Reference template to conduct reference checks.
- ✓ There is nothing particularly creative about a "cold call". However, the 5 minutes it takes to do it may help identify an intangible issue that the conventional application and interview process completely overlooks or fails to identify.
- ✓ This remains to be a challenge as most references only provide positive comments and are less likely to identify areas where a candidate could make improvements.
- ✓ Ask as many questions as they will allow. Ask about work ethic, character, timeliness, professionalism, judgement, etc... The subject matter will surface quickly, it's the personal traits that are sometimes hard to uncover in an interview. We also will snowball reference check, asking previous

employers who may not be listed as a reference, and asking listed references if they know anyone else we should talk to. The area where we need to improve is checking social media accounts, this is likely the best way to really see their character and personality.

- ✓ Check the references from past employers that they might not list. Seek individuals that might know something about the applicant.
- ✓ I always ask for another "unlisted" reference I could call. This is helpful. I like to keep reference check info on SharePoint or some kind of share format that the entire search committee can see the data.
- ✓ We always call the most immediate employer; I check for any online information.
- ✓ Kentucky - All references should be checked of course. We have a standard electronic reference form. The reference receives an email with a link to the online form.



## 2 Describe any formal or informal new agent training techniques that exist within your organization.

- ✓ We use an on-boarding process with several steps and mentors are assigned to each new hire unless it is a transfer.
- ✓ Arkansas has a formal mentoring program that lasts one year. Also, there are written guides for the new employee and



supervisor for the first year of employment to guide the supervisor in onboarding the new employee. We have a few online courses for new employees as well as face to face onboarding training.

- ✔ One-day orientation soon after they start, two to three day fundamentals training during first six months. We are developing a new onboarding and mentoring process presently.
- ✔ We have a new agent mentoring system that pairs new agents up with a team of assigned mentors who meet regularly with new agents across the state. Subject matter training is also offered new agents as part of their respective program unit i.e. 4H new agent training. All new agents are provided start-up resources to accommodate costs associated with additional training opportunities pursued in the first two years on the job.
- ✔ A 2-3-day new agent orientation is held on campus. Periodic program reviews are conducted at 3 months, six months and 12 months. Mentors are assigned to each new agent - typically from the same district and same program area. Agents are encouraged to visit with all counties in their district within the first year.
- ✔ Our Region has four new agent training sessions held quarterly that all new agents participate in. After they have worked a year, they will have been through all four sessions. We have BEST **Building Exceptionally Skilled Teachers**, which has two online modules and one face-to-face trainings. Every new agent is required to complete this in the first three years.

- ✔ All new agents attend a new agent orientation on campus immediately following their hire date. All new agents are assigned an agent mentor for at least one year. All new agents work closely with their District Program Leadership Team and attend local training throughout the year. The District Program Leadership Teams coordinate First Fridays which is a WebEx based training that is open to both new and experienced agents on the first Friday of every month.
- ✔ We have a fairly systematic onboarding system for all new agents. In most cases our new hires spend the first 30 days in a shadowing capacity in a neighboring county, prior to starting work in their home county. They also are assigned a mentor for a period of one year. Our training sessions consist of: Program Excellence Academy - 2 sessions, four days each, that focus on Program Development, Delivery and Evaluation. These sessions are conducted centrally, and all new agents come together from across the state. We also conduct Regional Training, called the 4 Ps - People, Programs, Partnerships and Professionalism. This three-part series focuses more on the "Soft Skills" that make an agent successful.
- ✔ On-boarding training, training in district setting and also us of mentors through-out the new agent first couple of years.
- ✔ Onboarding which includes First Step, DEA meetings, Regional Program Leader meetings, 4H specialist meetings. Mentors. Quarterly trainings by the region utilizing experienced agents, speakers, administrative persons Academy of Extension in the fall and spring.
- ✔ Arkansas has a formal Onboarding process. All agents have an assigned mentor. There are specific expectations for the staff chair, mentor and new agent. Monthly Mentionable sessions via Zoom. Conducted by PSD. Filling Your Extension Toolbox training conducted by PSD. 4 days Core curriculum training. This year a Peer to Peer training was conducted for new Ag agents. It was rated as the BEST training for new agents by the participants.



- ✓ We have a statewide organized mentoring program ran by a mentoring team consisting of Extension employees. We do different things from region to region. The Central Region in TN has a new agent cohort that meets quarterly to cover training topics. We also do some online training for new staff. TN is in the process of developing soft skill competencies and develop new hires training programs based on soft skill assessment.
- ✓ We have a formal orientation and mentoring period of 1 year for new county agents with handbooks for (1) New Employee, (2) Supervisor (3) Mentor.
- ✓ Currently two - two-day sessions on campus for all new Extension faculty, very few state faculty attend. One two day sessions with new Extension, Research and Teaching faculty one time a year.
- ✓ We have a combination of face to face and online "on boarding" steps that new agents must complete. New Agent Orientation, New Agent Training, online learning modules.

### Please include any links to resources you use in your new agent training.

<http://ces-personnel.ca.uky.edu/new-agents>

Passwords are required

<http://www.intra.ext.vt.edu/staffdev/onboarding.tamu.edu>

<http://agrilife.org/od/employee-development/extension-onboarding/>

New Employee Welcome Center

<https://uofaces.wordpress.com/>



<http://ces-personnel.ca.uky.edu/>

### 3 What methods are used to reward excellent performance through your institution's performance appraisal process?

- ✓ We have a Career Ladder protocol available (I, II, III level system) with an 8% raise at each level.
- ✓ Merit raises based on rating score and an in-county promotion system through the levels of Agent I, II, III and IV (distinguished agent). Merit raises are usually small. Promotion from Agent I to II is currently \$3,500 to base salary and \$4,500 from Agent II to III.
- ✓ No formal mechanism exists for rewarding performance that is rated as excellent. The priority need related to a formal merit-based award process is a cited in the current strategic plan.
- ✓ Salary improvements based on performance.
- ✓ The merit raise system allows District Directors the opportunity to provide larger raises to the highest performing agents.
- ✓ We have recently tied our performance appraisal system directly to our career ladder promotion system. This was a big step for us, and one that will truly recognize performance and not simply writing ability. In recent years, all of our salary increases have been merit based, tied directly back to the performance appraisal and their final rating.
- ✓ Very little salary increases and some paid time off.
- ✓ Merit raises, Administrative Leave Days, Awards.
- ✓ Some years when raises are given they are performance based, some year cost of living.
- ✓ Kentucky - We have a career ladder with 5 levels to which agents can apply. There are salary increases associated with each level. Merit salary increases, based on

performance are also utilized. We also support agent professional organizations.

### Do you have any successful strategies for dealing with difficult or unsatisfactory performance appraisals?

- ✔ This is a big topic and one that we all could write a book on. By far and away - moving forward with a Performance Management Plan and dealing with the issues quickly and concisely is key to reaching successful conclusions.
- ✔ Verbal and written warnings are used, and have been successful in turning some people around.
- ✔ Start with the positive and gradually build a conversation around the specific areas that you feel the employee can improve upon. Be willing to accept some push back and offer tangible examples of steps that may be taken to improve performance. Have this conversation scripted in your mind prior to the formal appraisal.
- ✔ Good documentation, very specific and focused plan of improvement.
- ✔ All agents are encouraged to provide written responses to their evaluation back to the District Director.
- ✔ There should be no surprises in a performance appraisal conference. If an employee is taken aback by a score or a rating, we have not done our job in coaching throughout the year.



- ✔ Place the individual on administrative review and develop and growth plan for the individual. This takes time and effort of both parties. You must check and follow up often.
- ✔ Work with the agent to develop a performance improvement plan. Meet regularly.
- ✔ Follow through on conducting performance improvement plans. I think it is important to stay on top of these situations. If employees are not showing improvement, procrastinating the exit process hurts everyone involved.
- ✔ We set up a personal improvement plan for all faculty that receive below a "satisfactory" rating.
- ✔ Start early. Don't put problems off, they just become bigger problems. Get help - talk to other District Directors for ideas, HR specialist....

### How do you address the separation of administrative vs programmatic duties in a performance appraisal?

- ✔ Our Performance Evaluation document has these sections broken out nicely and we can discuss each job duty area separately.
- ✔ Most CEDs are required to do administration and have programmatic responsibilities. We have several cases where the CED is responsible for two counties, thus only administrative duties.
- ✔ Percentages are assigned to individual job duties. All employees report to a job duty that is related to their specific position based on their job description.
- ✔ County directors are scored in specific criteria which are in a section of the performance appraisal for county directors only.
- ✔ Virginia Cooperative Extension has an evaluation matrix that includes indicators for both administrative and programmatic duties, therefore agents can be evaluated on both sets of duties.

- ✓ Our system is clearly delineated into programmatic areas and administrative areas. While our scoring system places more weight on programming, areas such as accountability are clearly highlighted as important. Other areas such as volunteer management, office management, fiscal management, etc... have their own sections and allow for a good discussion on the importance of these skills in a total program.
- ✓ I am not sure if you can 100% of the time.
- ✓ Regional Program Leaders provide input for program performance, works with agents to be successful District Administrator does the performance review, assigns ratings for merit raises, works to help agents be successful.
- ✓ In some performance areas staff chairs have different standards than agents.
- ✓ We have PA divided into areas as follows: 1) Program Planning 2) Program implementation and accountability 3) Professionalism 4) Administrative (For county directors).
- ✓ For our County Extension Directors, it is all included in their appraisal.
- ✓ Kentucky - We breakdown the agents job into separate "Major Job Requirements". Some relate to programming and some relate to administrative functions. Each MJR is weighted and evaluated separately.

#### **4 Please share any BMPs on remote supervision of staff to assure accountability?**

- ✓ A difficult task for sure. Best BMP here is to hire good people and let them work. Other than that, meeting privately and in groups, listening to their colleagues, conducting regular training in person and digitally, and seeking client input has worked well for me. Trust is key - they need to trust me and I them - never operate off half of the story and they need to know I have their back. When this happens, they are very up front with their issues. I generally have very few problems.



- ✓ North Central Administrative Team weekly update.
- ✓ A tremendous amount of trust must be placed in agents supervised remotely. A tiered administrative process ensures that a local contact is able to work jointly with the regional supervisor to oversee office operations and individual performance. County Coordinators are asked for individual input during evaluations processes. Inevitably problems arise on rare occasions and should be dealt with promptly.
- ✓ Communication is the key. Look for as many opportunities to interact with agents throughout the year. Attend as many local programs as possible. Attend agent quarterly meetings.
- ✓ This really varies, depending on the individual and how much supervision they might need. In any case, communication is the key to success. Even with the top performers, a consistent plan to communicate is essential. I believe that attending/observing programs should continue to be a top priority for supervisors.
- ✓ Just monitor reports, drop in visits, schedule one on one meeting throughout the year.
- ✓ Review of Texas Data System Reports LYNC meetings when appropriate Emails.
- ✓ Traditional reports and paperwork. Quarterly staff chair Zoom sessions.
- ✓ Regular contact. Regular county director meetings. Organized county visits to meet with staff and address concerns.

- ✓ We have a County Extension Director in each county.

### What communication techniques do you use to ensure organized engagement?

- ✓ Visits, e-mail, webinars, phone calls, regional meetings, and one state meeting per year.
- ✓ I do a weekly district update every Sunday evening. It covers pieces of leadership tips, announcements, deadlines, my schedule, and recognition of staff in the district.
- ✓ We use multiple strategies including County Coordinator conference calls (monthly) regional newsletters (monthly), regional staff conferences (quarterly), Regional Lead Agent / Program Team Leader meetings (quarterly). Typically, regional supervisors do rotational weekly site visits to counties throughout a region and regularly participate in agent programs.
- ✓ Email with all agents through the listserv as well as face to face meetings with Unit Coordinators.
- ✓ Regular e-mail updates, and routine phone calls to individuals are very important. We also have Districts and Regions that meet via webinar bi-monthly or quarterly to provide updates and hear from agents across the area that is supervised.
- ✓ Email, video conferences and other technology.
- ✓ LYNC WebEx.
- ✓ We use ZOOM a lot for video conferencing and meetings. We still conduct county director meetings every other month in person. Obviously email groups are useful. We are currently working in TN to move to a new online learning system. This will be important in engagement as well.



### 5 Please share any BMPs on strengthening new or existing stakeholder relationships.

- ✓ Two of the best are impact reporting and the use of advisory councils.
- ✓ Division administration created "Friends Committees" in each county to assist with communication with legislators and funding bodies.
- ✓ Meet with the County Manager(s) at least annually and attend and speak at all the special functions I can - Report to the People, Report to the Commissioners, Volunteer Appreciation. etc.
- ✓ Traditional public relations methods are essential to the maintenance of support for Extension programs in the community. Active engagement in community meetings, civic organizations (either as a participant or a speaker), and professional groups is helpful with respect to ensuring that people are aware of the services Extension has to offer. As it relates to the connecting with the general public, efforts should be made to take Extension work to venues and/or places (public or private) where the community convenes to do business or recreate. Farmers markets are an ideal venue to engage the general public on topics that are clearly aligned with Extension work. Libraries, schools, parks, home and garden centers or other similar locations may provide additional points of interactions. INTERACTION is key.



- ✔ Spring and Fall meetings with speakers Trainings in person or online Individual meetings if needed.
- ✔ For a limited number of Extension Agents annually we offer a two session 3-day training that includes faculty from research, teaching and extension.

### Please share any resources utilized in support of leadership development.

- ✔ I have used a variety of personality tests, curriculum, etc. The best results have been from highlighting successful colleagues that have demonstrated leadership success; use them as the resource people.
- ✔ I pay for outside presenters and purchase books for all the Administrative Team - County Extension Directors and Administrative Assistants.
- ✔ LEAD 21: lead-21.org Joint Council of Extension Professionals (JCEP): jcep.org Northwest Region Supervisory Training Series:  
<http://extension.missouri.edu/nwregion/supervisorytrainingseries.aspx>
- ✔ We are in the beginning stages of Lead 95, a training developed for new county directors.
- ✔ We will be using established programs such as Myers-Briggs Type Indicators, True Colors, 360 Survey, etc.
- ✔ Part of the Onboarding process.

### 7 Describe any successful strategies utilized to enhance local support for Extension operations.

- ✔ Program impact statements and showing the dollar investment by the University in the local county have worked very well to help in this area of work. Each County is provided information unique to them as to dollar amounts. For example, a County appropriation may be \$75,000.00 and the



- University is investing \$300,000.00 in personnel. This shows our commitment.
- ✔ We have several counties that have secured new facilities or are planning to do so. It is a direct result of the CEDs I have in those counties.
- ✔ Develop an annual report. Include data associated with Farm Gate Value reporting to drive home the economic impact associated with the sector with which Extension is most closely aligned. Participant numbers are great, but not always a good indicator of program impact. Value statements associated with an individual's program can help quantify the value of programs for which little direct economic benefit may be derived. See: LEARN HOW TO ANALYZE COST BENEFITS OF EXTENSION PROGRAMMING  
[https://www.cals.ncsu.edu/agexed/exeval/Evaluation%20Website/Learning%20Resources/Learn\\_How\\_to\\_Analyze\\_Cost\\_Benefits.pdf](https://www.cals.ncsu.edu/agexed/exeval/Evaluation%20Website/Learning%20Resources/Learn_How_to_Analyze_Cost_Benefits.pdf)
- ✔ We will soon be using a system wide on-line registration program that will allow for the acceptance of credit cards. We are also beginning to discuss areas where we could generate revenue from our programs beyond cost recovery.
- ✔ Regular reports to Commissioners' Court Agents serve on local committees.
- ✔ County Friends Committee Interpretive Events with Co. Quorum Courts and other local leaders.
- ✔ Focus has changed to more fee based programming. Each county has endowments and we are working hard to grow endowment funds as well.



- ✓ We have an Extension office in each county, a County Extension Director in each county.

### **Describe any creative or non-traditional funding arrangements that may be deployed in support of Extension projects.**

- ✓ The use of Contract positions has worked well. Example - a person hired for \$5000.00 from a foundation to conduct 4-H activities for a summer period.
- ✓ We have funding agreements with city entities and also one County 4-H Foundation to support county staff.
- ✓ Have some programs funded through our State Agriculture Foundation.
- ✓ Pursue funding where it seems to be available. Depending on specific geographic proximity, funding models may be shifting away from state and even county level support in favor of alternative creative arrangements that exist with municipal governments, school districts, NGO's. Traditional formula funding must be flexible. Agents are encouraged to cover the cost of programming/projects using grants, partnerships, sponsors and revenue.
- ✓ The summer intern program is funded 50/50 between Virginia Cooperative Extension and local dollars.
- ✓ Endowments, Grants, Fundraisers, dances, bake sales (one county brings in over

\$10,000 with its bake sale), BBQ's, hunts, golf tournaments and silent auctions.

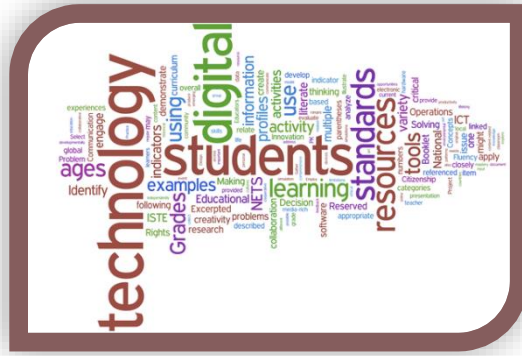
### **8 Please share any BMPs in regards to marketing Extension to non-traditional users?**

- ✓ Video use as well as social media has worked well with this clientele. If we can get them, regular e-mails are successful.
- ✓ Social media is used extensively.
- ✓ Use a great deal of social media to reach out to too many audiences.
- ✓ Marketing strategies should mimic shifts that occur in the private sector away from traditional methods and towards web based / social media. Such strategies will never completely supplant traditional methods, rather they should target audiences that are being missed by current target marketing i.e. youth and minority audiences. Creative ways to identify teachable /visible demonstrations of lessons that Extension programs teach throughout the community (urban and rural) are a good idea for staying in front of the "customer" or stakeholder.
- ✓ Newspapers, Social Media, emails, flyers, radio, Television.
- ✓ Cross marketing is a real potential. We should market all program areas when conducting programs. Obviously social media is important for non-users. Many cities and communities have social media "Hip" pages that you can join and advertise programs to non-users.

### **9 Please share any ways in which technology has assisted you in your role as a Middle Manager.**

- ✓ Essential!!! Webinar training, e-mails, and easy cell phone access have been essential.
- ✓ We regularly use the Zoom app to hold quarterly Staff Chair Conferences.

- ✓ I utilize computers - desk top, laptop, IPAD, and two smart phones, to be accessible most of the time.
- ✓ Web based technology makes it easier to be anywhere at once. Tasks such as signing off on financial documents that previously may have required, time, travel and/or postage can now be performed at the drop of a hat using mobile technology. Meetings that would have only been possible in person, cannot be conducted virtually. Research that would have taken hours previously now can be conducted in minutes.
- ✓ We are utilizing Microsoft OneDrive shared folders for agents to provide supporting documentation for their program accomplishments. Agents are able to share not only newsletters, but also radio programs, photos, videos etc. We are looking at streamlining the folders to match the MJR's listed on the performance evaluation.
- ✓ Polycom and WebEx have provided the opportunity to meet virtually for both agent meetings as well as Unit Coordinator Meetings while alleviating constraints posed by the budget.
- ✓ Quarterly Regional Updates meetings held via webinar. This seems to be a very efficient use of time and resources.
- ✓ Communication - cell, email, Zoom - online line meeting software. Most important still face to face - low tech.
- ✓ I have moved to using tablet for communication when traveling. SharePoint has been great too. I think it's important to have info in a system that is easy to share with colleagues. Online video meetings have been great too.
- ✓ Using the Zoom app for short meetings, trainings, and conferencing has increased efficiency.
- ✓ We use interactive video for administrative use, program planning, agent meetings, and program delivery, using Skype for Business (free to all faculty and staff) All Faculty can use "SharePoint" and "OneDrive" for document sharing, Office 365 Cloud Services University "Drop Box" 20GB availability for all faculty County Faculty in



one Extension District by program area has implemented district-wide information delivery via, integrated social media platforms using "WordPress, Facebook, and Twitter" using a custom developed subscription system,

<http://subscribe.ifas.ufl.edu/>

- ✓ Video conferencing has made it possible for have face to face meeting with agents without the usual travel time.

### Please share any uses of technology that are being used in your organization to assist personnel.

- ✓ I-books, kiosks, webinars, video reporting, YouTube, etc. have all been employed.
- ✓ Zoom training meetings for agents are used in lieu of face to face meetings to increase efficiencies related to time and travel.
- ✓ We use Blackboard Collaborate, Google Hangout and Zoom to reach personnel.
- ✓ All agents receive a mobile phone stipend, laptop and other equipment required to perform their jobs. There is little, if any learning curve associated with the use of this equipment, with the notable exception of applications that may be required for specialized purposes.
- ✓ On-line training modules are currently being used for both agents and staff. The First Fridays training program outlined above utilizes WebEx as the delivery mode.
- ✓ Online trainings keep personnel informed of update in information, of trainings



available, of conferences that may enhance programs.

- ✓ We have a District IT specialist in each extension district that assists in hardware, software and connectivity issues- definite need for application support.

## Please share any other Best Management Practices that might help your fellow Middle Managers.

- ✓ I introduced Strengths Finder to the Administrative Team about five years ago. It has been used in all county offices to have staff understand how to work together. I do a training on this with New and Aspiring CEDs and they find it helpful.
- ✓ Agents are overworked. Provide positive thoughts, encouragement, and sometimes make funny awards to liven up the meetings. If allowed, give administrative leave for jobs well done. We are allowed to give up to 4 days a year. Find ways to let them know what they do is appreciated. I've learned they don't want to read Blogs that are lengthy. Short bits of information: Who, When, Where, What, Why, and How. That's all you need with pictures. Everyone likes pictures.

## Resources

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