

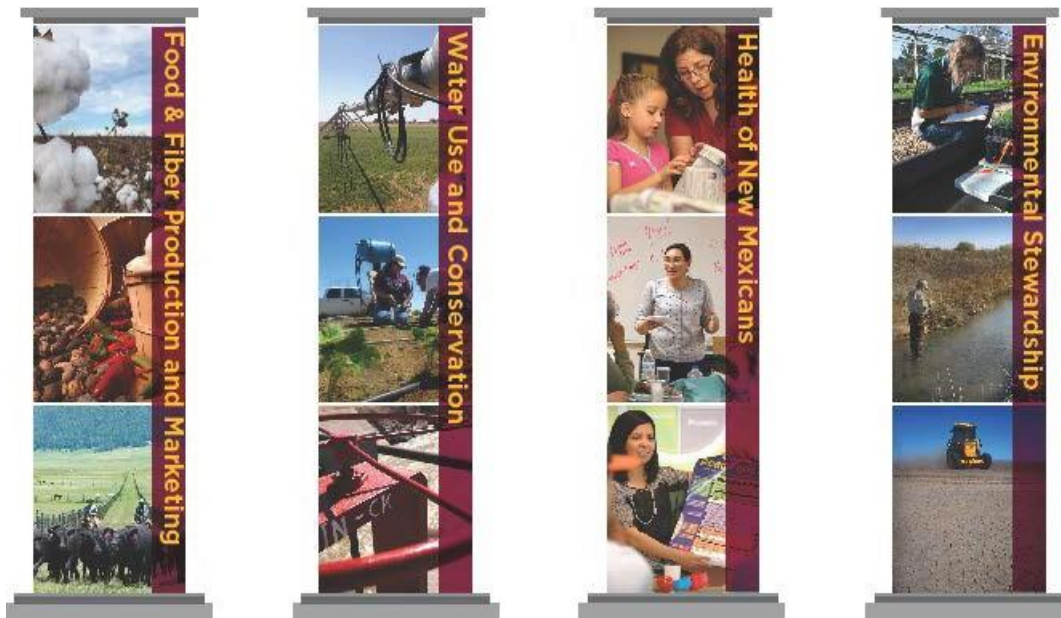


BE BOLD. Shape the Future.
College of ACES
Cooperative Extension Service

County Director's Manual

Revised 10/2018

ECONOMIC AND COMMUNITY DEVELOPMENT



Welcome County Director

Welcome and thank you for taking on the role of County Director. You will be taking on the lead role in the extension office and must lead by example and execute your leadership and team building skills with in the County office.

The role of County Director is a diverse and complex roll. As county director, you will be required to make sure that the extension office runs efficiently and smoothly.

- Staff (Exempt & Non-exempt)
- Personnel Issues
- Programs and Events
- Hours of operation (**Holiday's**)
- Policies and Procedures/ Union Contract
- Budget

Staff:

Communication amongst the staff starts with the county director. Communicating with each agent in the office as well as the administrative staff will be an effective way of keeping everyone engaged in the day-to-day office activities. Being aware of what the team is doing and allowing them to share their project and program schedules with others will instill the sense of respect for the individual as well as building a team like atmosphere. With effective communication, the admin staff will be able to wait on clientele more efficiently and effectively if they know the agents schedule and responsibilities.

Personnel Issues:

The county director will need to set and share the expectations of the office staff for their work schedules, programs and leave requests. The county director will need to address any personnel related disputes/conflicts. Familiarization with the NMSU Policy Manual would be beneficial to the county director. <http://af.nmsu.edu/policy-procedures/>
Union Contract: <https://hr.nmsu.edu/wp-content/uploads/2016/10/ASFCME-2016-MOU-and-Contract-searchable-for-website.pdf>

Agents Programs and Events:

County Directors should make themselves familiar with what each of the staffs' job expectations and duties are. This will allow the office to better assist the clientele and other staff with the day- to- day operations of the office.

Hours of Operation:

In order to assist the clientele that call or walk in, hours of operation must be set and followed by all office staff. Should, for any reason the office need to close. Follow the direction handed down from the Director/Dept. Head.

***Note:** County Extension Agents will follow the county holiday schedule while office staff will follow NMSU holiday schedule. They may choose to take off when the county is off but will have to use annual leave.

****Note:** NMSU closes for an extended period during the Christmas break, which includes the office staff.

Policies and Procedures:

Familiarize yourself with the NMSU Policy Manual as well as the Business Procedure Manual. Most, if not all items will be addressed in these two manuals.

Budget:

One of the most important tasks that a county director will be responsible for is the budget. It will be the County Directors responsibility to track and maintain the budget as well as sharing the expectations of the budgetary process and expectations with the rest of the extension office staff. Each office is allocated a dollar amount for their county O&M (Operations & Maintenance) to be utilized for that fiscal year. Some suggestions for those with limited O&M are:

- Per Diem vs. Actuals
 - *If the county director puts this into place, they need to be sure that it is across the board. Each staff member must follow the expectation including the County Director.*
- SWBFS&EPC Grant, etc.
 - Familiarize yourself with what programs are out there that may supplement your programs by making them a part of your presentations.

****County Directors should practice the same expectations set forth for staff.**

County Director Manual

As a County Director you have a major responsibility for the day-to-day supervision and training of new county Extension agents. Your performance in this leadership role may be the single most important influence in the process of inducting and training the new employee. This County Director Manual is designed to help you fulfill this critical role.

Contents

- On-boarding
- Inducting the New Agent
- Extension Organization
- Role and Responsibilities
- Program Development Process
- Professional Development

Inducting the New Agent

Objectives:

The County Director will:

- Assist the new agent with immediate personal needs
- Prepare for the new agent's first day on the job
- Arrange for the suggested learning activities and experiences during the first 3 months

A new Extension professional is faced with a host of decisions and arrangements to be made almost immediately following appointment. Priority should be given to satisfaction of personal needs which must be met before the new agent will be able to give satisfactory attention to job responsibilities. The County Director and other Extension faculty should assist the new agent with necessary arrangements that come with moving into a new community.

Providing assistance with meeting personal needs and making preparation for the new agent's first day on the job tells the agent, "I have anticipated your arrival". This is an important step toward establishing strong interpersonal relationships between the County Director and the new employee.

The training given to new staff members the first few days on the job should acquaint them with co-workers, office procedures, key individuals and the communities in the county. During the first 3 months of training, new employees will begin to acquire knowledge of the basic philosophy of Extension and become acquainted with the organization and its personnel. Hopefully, learning experiences will cause new agents to feel a part of the organization while providing them with opportunities to perform various aspects of the job for which they were employed.

The following checklist will be useful as an aid in planning and conducting orientation and training during the first 3 months of the new agent's career.

Checklist of Suggested County Director Activities

A. Prior to arrival the County Director should:

1. Contact the new agent regarding travel plans, moving arrangements and arrival schedule by one or more of the following:

_____ Phone call _____ Personal letter _____ Planned meeting

2. Assist with locating housing and associated arrangements as needed by providing information regarding sources for securing and/or locating:

_____ Housing

_____ Newspapers

_____ Utilities

_____ Churches

_____ Telephone

_____ Schools

_____ Mail service

_____ Health care facilities

3. Notify key individuals regarding new agent's expected arrival including:

_____ Co-workers

_____ Advisory Committee Chair and members

_____ Key leaders (County Faculty)

B. Upon arrival the County Director should:

1. Provide a genuine welcome by:

_____ Meeting the new employee when he/she first gets into town

_____ Offering to assist with "moving in" if needed

_____ Offering the first meal

2. Put the new agent at ease by:

_____ Explaining exact location of the office

_____ Explaining when to report for work the first day

_____ Explaining appropriate dress for first day at office

_____ Explaining parking availability

_____ Providing office keys if needed

_____ Providing opportunity for new agent to ask questions

C. The first day the new agent is in the office the County Director should:

1. Help the new employee develop positive perceptions by:

_____ Being at the office when the new agent arrives

_____ Providing the new agent with a neat, orderly office or work area

_____ Providing the new agent with a desk, telephone, computer, basic office supplies and an Extension calendar

_____ Providing nameplate on desk, name badge and business cards

2. Accept the responsibility for conducting orientation and training the first day in the office by:

_____ Showing new agent around office

_____ Introducing new agent to co-workers

_____ Introducing new agent to county commissioners, if possible

_____ Introducing new agent to other employees in same building

_____ Providing a calendar and an overview of Extension programs and job assignments

_____ Complete the "Mobile Communications Device Allowance Authorization Form" only if the Agent desires it.

_____ Complete, if needed the "Procurement Card System Access and Change Form"

_____ Informing new agents about office routines such as:

- | | |
|-------------------------------|-------------------------------|
| ❖ Office hours | ❖ Use of Administrative staff |
| ❖ Office conference schedules | ❖ Office supplies |
| ❖ Handling office visits | ❖ Appropriate dress |
| ❖ Handling telephones | ❖ Salary and travel procedure |
| ❖ Handling mail | ❖ Building security |

D. The first to fourth week the new agent is on the job, the County Director should assume responsibility for training; delegate some aspects of training to other faculty members; and provide some undirected time for new agent to determine own schedule. The County Director should:

- _____ Brief new agent on major programs being conducted in the county
- _____ Inform new agent about backgrounds of key individuals
- _____ Identify county facilities to which Extension has access
- _____ Identify and demonstrate copy machine, computers, audio-visual and other equipment to which Extension has access
- _____ Explain procedure for securing equipment and supplies
- _____ Welcome the new agent at their first office staff meeting
- _____ Arrange for new agent to meet officers/leaders on Advisory Committee
- _____ Arrange for new agent to attend a variety of group meetings to observe regular or special Extension activities
- _____ Schedule conferences of new staff member with other Extension personnel in county to discuss roles, responsibilities and relationships
- _____ Accompany new agent on farm or home visit
- _____ Provide opportunity for new agent (and family) to get to know work associates and families in out-of-office situation
- _____ Arrange for new agent to meet and be interviewed by local newspaper and/or other news media
- _____ Inform new agent about unique local customs/traditions
- _____ Explain reports required of the Extension agent
- _____ Designate specific times to discuss programs for which new agent is responsible
- _____ Attend first meeting for which new agent has responsibility
- _____ Catch the new employee "doing something right" and provide immediate positive feedback on that specific behavior

- _____ Explain procedure for requesting:
 - Sick Leave
 - Annual leave

- _____ Explain procedure for requesting authorization for out-of-county travel

- _____ Explain the budget as it pertains to travel and programs for the agent.

- _____ Demonstrate use of the filing system

- _____ Provide transportation to professional meetings outside county if appropriate

E. The first to third month the new agent is on the job the County Director should assume responsibility for training the new agent, delegate some responsibilities to others, and allow the new agent to increasingly set his/her own pace. The County Director should:

- _____ Read and discuss job description with new agent

- _____ Assist the new agent with completing the *"Self-Study Guide for the New Extension Agent"*

- _____ Evaluate regularly to determine progress made in completing learning experiences suggested in the self-study guide

Extension Organization

Objective:

The County Director will help the new Extension agent become familiar with Extension organization.

It will take time for agents to understand all there is to know about Extension. The County Director can help them begin to learn, and should encourage new agents to ask questions. New agents need to have access to Extension reference materials and opportunity to read or review these. The County Director should also review the "Organization and personnel" section of the *New Extension Agent Self Study Guide*.

The following checklist has been developed for the County Director to use in giving the new agent reading assignments. Reading these materials will require a great deal of time on the part of the new agent. Each item should be discussed after it is reviewed. After each item is discussed, the County Director should record the date in the appropriate blank. This activity should be completed by the end of the first 6 months of employment.

The county Director will need to have periodic conferences with the new employee to determine progress and answer questions. The new agent should become increasingly self-directive in job responsibilities and in finding answers to questions. If this does not become evident over time, more frequent counseling sessions may help.

CHECKLIST OF GENERAL REFERENCE MATERIAL

_____ *NMSU Policy manual*

_____ Union Contract

_____ Personnel Directory

_____ Organizational charts

_____ Current printed annual reports

_____ Civil rights (EEO/Affirmative Action) policies and guidelines

_____ Performance Appraisal System for Extension Agents

_____ *Publications & Videos*

_____ Procedure for scheduling specialists

_____ Resource material common to the position or job responsibilities

_____ Procedures and instructions for preparing and submitting required reports

- Plans of Work: digitalmeasures.nmsu.edu/
- Impact Reports: digitalmeasures.nmsu.edu/ **(insert within Plans of Work)**
- Annual Performance Evaluation: [aces.nmsu.edu/ces/eap/performance- evaluation.html](http://aces.nmsu.edu/ces/eap/performance-evaluation.html)
- Allocation of Effort: aces.nmsu.edu/employee/pt/welcome.html
- Conflict of Interest: hr.nmsu.edu/
- Contact Reporting : <http://reporting.nmsu.edu/>
- *CES Faculty Plans of Work can be previewed at:* aces.nmsu.edu/directory/pows/
- Annual Compliance

_____ Current issues of the Journal of *Extension*

Role and Responsibilities

Objective:

The County Director will help the new Extension agent develop an understanding of the role and responsibility of the new job during the first year of employment with the New Mexico Extension Service.

A. During the first 6 months of employment the new agent will:

- _____ Study the current College of Agriculture, Consumer and Environmental Sciences' Strategic Plan
- _____ Study the current plan of work
- _____ Review last year's county annual report
- _____ Review the departmental budget
- _____ Review the reimbursement process
- _____ Confer with other County Directors and any others concerning ways to get involved in the on-going county Extension program
- _____ Review the Civil Rights Resource Center and Civil Rights Process.
<http://aces.nmsu.edu/ces/civilrights/index.html>
- _____ Develop an activities calendar for the coming year
- _____ Prepare for and participate in a new employee orientation conference held at NMSU.
(The County Director should discuss such items as appropriate dress, attitude and behavior of new agents at this orientation conference)

B. During the first year of employment the new agent will:

- _____ Review job description (see guidelines available)
- _____ Prepare for and participate in a program development Advisory Committee meeting

C. The following items are suggested learning activities in which the County Director should involve the new agents to help them become more self-directive over time:

- _____ Identify necessary steps to take in setting up and preparing for a committee meeting
- _____ Observe and/or take part in making an agenda for a meeting
- _____ Be involved in contacting committee members about a meeting
- _____ Participate in planning an annual meeting of the Advisory Committee
- _____ Develop an understanding of the major program areas of NM Extension
- _____ Study the critical issues being addressed in the plan of work
- _____ Work with or assist one or more committees in developing annual plans
- _____ Work with or assist one or more committees in carrying out an educational activity in the plan of work
- _____ Work with the county staff in writing a plan of work based on plans made by one or more committees
- _____ Involve at least one resource person in planning and carrying out an educational activity of a committee
- _____ Help identify and recruit volunteer leaders for committees
- _____ Meet with 4-H clubs, 4-H council and adult leader group to conduct business and/or receive training
- _____ Meet with other Extension organized groups to conduct business and/or receive training
- _____ Know the programming and meeting procedures followed by 4-H clubs and other Extension organized groups at the county level

D. Following is a partial list of materials the County Director should provide for the new agent to use as references.

- _____ *Handbook for Working with Advisory Committees*
- _____ Annual Plan of Work
- _____ List of Advisory Committee (executive board/program area and issue committees)
- _____ Organizational structure of Advisory Committee
- _____ CES Publications
- _____ 4-H membership and adult leader records

_____ 4-H calendar of events

_____ 4-H Policy and Procedures

Program Development Process

Objective:

The County Director will help the new Extension agent understand and be able to apply the program development process in carrying out job responsibilities.

Program development is a life-long learning process. New agents should be involved in Extension activities so they can experience program development in action. New agents should study human behavior and begin to develop programming and people skills.

As County Director counsels with new employees, the basic principles of program development should be brought to their attention. The County Director should help the new agent understand the importance of these principles in developing effective educational program. The principles are as follows:

1. Know and understand the county situation
2. Aim at the needs and concerns of people
3. Involve people at all stages of program development (planning, implementing and evaluating)
4. Involve leaders and develop leadership
5. Plan and develop educational programs
6. Keep programs flexible
7. Reach all target audiences who should be involved in helping solve the problem(s)
8. Coordinate educational programs with other relevant groups, agencies and organizations
9. Utilize qualified resource people
10. Use evaluation information to improve programming efforts

As the County Director involves new employees in the on-going Extension program, the new agent should learn Extension terminology such as program development, county advisory committee, Support Council, critical issues, and annual goals.

Professional Development

Objective:

The County Director will help the new Extension agent become aware of professional development opportunities with the New Mexico Extension Service during the first year of employment.

As an organization concerned with education, the New Mexico Extension Service places a great deal of value on employees continuing their professional development. A County Director can help the new agent become aware of the importance of continuing professional development and some of the more specific opportunities available to Extension employees. The following suggested learning activities should help: (Items may be checked by the County Director as counseling sessions are held with the new agent.)

_____ Read appropriate professional journals such as the *Journal of Extension*

_____ Become familiar with the various professional associations to which you may belong

- NAE4-HA
- NACAA
- NEAFCS
- Epsilon Sigma Phi

_____ Watch NMSU Extension Calendar for Professional Development opportunities.

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- Field Days
- In-Service
- Conferences

Tips Sheet

- Extension Agent instructions for Impact reports_
<http://aces.nmsu.edu/employee/>
- Guidelines for Promotion and Tenure of CES Faculty_
<http://aces.nmsu.edu/employee/>
- Example of County Extension Faculty Promotion and Tenure Portfolio
<http://aces.nmsu.edu/employee/>
- Hiring links
 - Separation Checklist for Exempt and Nonexempt employees
<http://hr.nmsu.edu/forms/>
 - Search Committee
<http://hr.nmsu.edu/searchcommittee/search-process/plan-recruit/>
 - ◆ List of names, titles and contact information must be sent to the District Director for approval
 - ◆ Declaration Statement must be signed by each agreeing to serve on committee
 - ◆ There is a list of approved questions to review prior to interview
 - ◆ Staff serving on the committee must be listed as well.
 - ◆ Committees must meet together prior to interview, not individually
- Program Evaluations
<http://aces.nmsu.edu/ces/eap/program-evaluations.html>
- Performance Evaluations
<https://hr.nmsu.edu/evaluations/>
- Reporting
<http://aces.nmsu.edu/employee/>

Hiring process: <http://hr.nmsu.edu/toolkits/>

The hiring process is different for exempt positions (Agents) and nonexempt positions (Admins)

Exempt Hire:

- Need to discuss vacancy or request for new position with District Director.
 - When a position is vacated, the employee leaving will need to submit a letter of resignation (unless other circumstances cause the vacancy)
 - An Employee Separation Checklist will need to be done on terming employees as well as informing the proper channels of the separation. A letter of resignation with the employees last day must be submitted to the CD and in turn sent to the HR dept. <http://hr.nmsu.edu/forms/>
- District Director will provide a memo to Associate Dean/ Director for approval to hire for vacant position
 - Associate Dean will determine if there is enough funding to replace the vacant position or enough to support a new position for that county office.
- Once the memo has gone through and approval has been given to proceed with the hire:
 - Job description will go out to County Director or District Director for review and approval.
 - District Director will request the dates for the job posting to occur
 - A guest user name and password will be given to view and pull applications
 - *This process has changed for 2014. The New People Admin Site does all the responses now. Including the reject letters.*
- County Directors will need to compile a list of potential search committee members.
 - Once members for consideration to serve on search committee have been selected, a memo will need to be sent to the Dean through the Associate Dean from the Dist. Director/Dept. Head listing all the members (must list staff serving as well) Name, title and email are needed.
 - There are guidelines for the search committee_ <http://hr.nmsu.edu/searchcommittee/search-process/plan-recruit/>
 - *List of names and contact information must be sent to the District Director for approval*
 - *Declaration Statement must be signed by each agreeing to serve on committee after orientation*
 - *There is a list of approved and illegal questions to review prior to interview*
 - *Staff serving on the committee must be listed as well.*
 - *2014 per Elizabeth Crabb, there needs to be an administrative asst. on the committee.*
 - *Committees must meet together prior to interview, not individually (Orientation)*
- Search committee, County Director and District Director will review the applications and choose the top candidates to select for an interview.
 - Formal letters will go out to each candidate inviting them to interview. The letter will include the time of interview, directions to interview location and what is required of them during the interview. (Include what will be available to them as tools to use)
- A formal letter with the list of interviewees and the times of their interview must be sent to the search committee.

- Once a candidate has been selected by the committee and County Director the following will need to be submitted to HR (Debbie Pepion –Exempt / Mary Hernandez – Nonexempt)
 - The deselection process is now the same for exempt and nonexempt, automatically sent from HR.
 - Sensitive Duties form signed
 - Application packet (Letter of interest, Resume or Vitae, Transcripts and References)
 - Salary
 - Any \$ amount to provide if moving costs are needed
 - *All items listed above must be sent to ACES-HR office to be reviewed and then forwarded on to HR in Hadley for approval to offer.*

- Once approval to has been given an Offer Letter will be sent by ACES HR Office
 - If offer is accepted by candidate, then and official letter must go out to all candidates that applied informing them that another candidate has been chosen. (For Exempt)
 - *Nonexempt and now exempt, applicants that were not selected are informed by the People Admin system automatically via email.*

- If candidate rejects the offer, the committees can chose to go with their next favorable candidate and follow the steps from selected candidate. Only if an alternate is listed by 1st,2nd or 3rd choice.
 - If committee does not want to go with any of the other candidates, then the process will need to begin from the beginning
 - *A formal letter must go out at this time informing all applicants informing them of a failed search.*
 - Exempt new hires have a one year probation period
 - Nonexempt new hires have a six month probation period

- HR is responsible for submitting paperwork for new hires, but it is **good practice to monitor** this and make sure that the proper paperwork for each new hire has been submitted.
- ***** Have the employee first go to MyNMSU.edu and go to "First Time User" to set-up their e-mail.**
 - New Hire paperwork Provide Employee Information for the following:
 - I9
 - W4
 - Direct Deposit
 - NMSU Employee Benefits
 - Non-disclosure agreement
 - Visit MyNMSU as a first time user
 - ◆ This will set-up your NMSU email & where you will get the on-boarding check-list
 - ID Card information
 - Emergency notifications sign-up

- System Set-up
 - NMSU ID and review MyNMSU website
 - Email via MyNMSU and departmental system
 - Computer Access (including department drives if applicable)
 - Computer Access Request Forms for Banner, Cognos, AiM, People Admin, etc. as required by position.
 - Defensive Driving (if applicable)
 - Mobile Allowance Authorization Form (only if employee requests)
 - Procurement Card Request and Agreement Form

Calendar of important events:

January

- Association of Counties, Santa Fe (County Directors Training)
- Legislature Session
- Agents evaluation due January 15th
- Winter Meetings

February

- Budget Process Starts
- Agent evaluations and Allocation forms filled out and handed off to Bea Garret (Agents to receive a copy of their signed evaluation)

March

- Annual evaluations memo sent out for exempt and nonexempt with listing of employees. (Exempt evaluations done electronically, nonexempt on paper form)
- Promotion and Tenure
- Final inventory due with certificates and letters

April

- County budget requests submitted to county board

May

- Civil Rights Review – Review Schedule dates: <http://aces.nmsu.edu/ces/civilrights/>

June

- 4-H month / District Contest
- State Fair

July

- New fiscal year begins
- Extension Agent's contracts sent out
- State 4-H Conference
- County Fairs begin

August

- County Fairs

September

- Evaluations, P&T forms to faculty
- Inventory process begins

October

- National 4-H week
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November

- Evaluation documentation due / Allocation of Effort Due
- State 4-H In-service

December

- Agent evaluations