

District 3 Staff Agenda  
September 18<sup>th</sup>, 2019  
Carroll County Extension Office

**Birthdays**

September	October
9 <sup>th</sup> Jerry Brown: Boone 27 <sup>th</sup> Stephen Conrad: Boone 29 <sup>th</sup> Traci Missun: Oldham	12 <sup>th</sup> Samantha Gamblin: Bullitt

**Association Reports & Awards**

**Personnel Updates:**

District 3:

- Lacey Kessell – Natural Resource Agent, Environmental Ed – Boone County
- Lamar Fowler – Resigned from Grant County 4-H
- Chris Duncan – Retired from Oldham County FCS
- Chelsea Young – Resigning on Oct. 4<sup>th</sup> from Owen County 4-H
- Cristin Sullivan – D3 STEPS Administrative Support Staff

State:

- Chad Jennings, New Extension IT Trainer

**KSU Announcements:**

- Dr. Courtney T. Owens, Interim Extension Admin  
Ms. Nancy Calix, Assistant Extension Admin for County Operations
- New Hires in KSU Extension
- KSU Mission Statement

**NEP Update:** Rosie Allen, Area NEP Agent

**I.T. Update:** Chris McKenzie, Computer Support Specialist III for District 3

**Guest Speaker:** Isaac Hilpp, Sr. Extension Specialist for 4-H Youth Development

**Administrative Updates**

**EXTENSION TRANSITION - *DISCUSSION #1* - 11:00 am ET**

- Chanda Hall, Jefferson County - Agent Transition Team Member
- Craig Wood, ANR Assistant Program Director - Administrative Transition Team Member

**Community Assessment Reports:**

- County reports now available!

<https://extension.ca.uky.edu/communityassessment>

- Marketing materials available here:

<https://extension.ca.uky.edu/content/agent-resources-community-assessment-0>

- There will be a series of webinars to explain the report and how it will tie into plan of work – *times and links to register are available on the agent resource website*
- The final 3 webinars will have in-service credit hours

### **Community Assessment Webinar Series:**

- Sept. 3 – Understanding your community assessment report – *Recording available*
- Sept. 10 – Understanding your secondary data – *Recording available*
- Sept. 24, 11:30 (ET) – Using your community assessment report with Councils and Boards – *Register through agent resource page*
- Oct. 15, 11:00 (ET) – Community Priority #1: Substance Use and Mental Health - *Register through KERS*
- Oct. 23, 11:00 (ET) – Community Priority #2: Economic Development and Workforce Prep – *Register through KERS*
- Oct. 31, 9:00 (ET) – Community Priority #3: Community Leadership, Engagement and Pride – *Register through KERS*

### **Agent Graduate Studies Updates:**

- EEP Form Update  
<https://www.uky.edu/hr/forms/employee-education-program-eeep-form-for-uk-employees>

### **Reminder Related to Request for Survey Studies:**

- Surveys by Extension employees working on a Masters or Doctoral degree with IRB approval:
  - If the survey is related to all program areas, approval from the Director of CES with input from Assistant Directors and Program Leaders is required
  - If survey is related to a specific program area, approval by the appropriate Assistant Director and/or Program Leader is required

### **Online Master's Update:**

- Applications closing Oct 31, 2019
- <https://www.uky.edu/academics/masters/science-translation-outreach-online>

### **UK Branding Initiative:**

- New branding guidelines have been announced
- No change in logos
- For now, no change for Extension – more information and updates will be available in January 2020

### **Report to the People:**

- There has been a change in the fonts for Report to the People
- Use Arial or Georgia – both are free fonts that should already be loaded on your computers
- Questions or concerns? Contact Hayley Pierce or Pam Holbrook or use the Report to the People Teams forum

### **HR Updates:**

- Camp and Field Trip Insurance Changes
- New State and Federal Employment Law Posters
- New Employee Orientation
- HR Tech: myUK app updated
- Blue and White Cards

- Harassment Training: Dates and locations TBA
- Extension Vacancies
- Wellness
- Annual Retirement Planning Conference
- IEEO Training

## **Extension Financial Operations Updates**

- **Travel Reimbursements**
  - 7,600 travel reimbursements processed in FY19 (Oct-Jun)
    - Overall, staff across the state have done really well with the change
    - EBO continues to offer support and training
  - Concur still coming but slightly delayed from original timeline
    - Pilots to start in Jan (*tentative*)
    - Go Live in spring (*tentative*)
- **Quick Books Online**
  - 46 counties currently online (D1, D2 and CM)
  - Will be going a bit slower with training and conversion
    - Will bring a district on each quarter (2 in Q4)
    - Train in last month of each quarter and go live on 1st of next quarter
    - D7 scheduled for training 9/16 & 9/17
    - Looking at possibly scheduling a special on campus training for the few counties who are negatively impacted by the Windows 10 conversion
  - Have made some minor changes in how we are using the system
    - Slight changes to the use of classes
    - Allowing the linking of credit card banks to feed transactions to QBO
    - Minor adjustments to CoA
  - FY20 budgets are loaded in all counties using QBO
    - FY20 budgets will be loaded by EBO as counties are brought online
    - If there are amendments, we need a copy of the signed budget and we will make changes for counties
- **Record-Keeping Compliance**
  - All counties should be using the standardized forms put in place effective July 1
    - Payment voucher
    - Credit card transaction log
    - Cash receipts transmittal log
    - Safe log
  - Retention schedule
    - We are working on creating an updated retention schedule with the draft schedule reviewed by UK Records Manager
    - Please tell counties to contact our staff if they have questions about retention.
- **Budget Module Development**
  - EBO is in process of creating a new module in KERS for collection of budget info
  - It will look very similar to the excel spreadsheets to avoid confusion and complexity
  - Will offer more consistency and standardization
  - Will offer better internal review
  - Will offer greatly improved reporting
  - MOA and Schedule of Disbursements will be printed for signature from KERS once reviewed/approved internally

- Goal is to have module ready for training in Jan with go live in Feb
- **Year-End Accounting**
  - Final county accounting is being calculated for review by District Directors.
  - Once reviewed and verified by District Directors, counties will receive final accounting.
  - (Note: most counties are receiving refunds)
  - Final FY19 trip invoice will be sent to counties separate from the final accounting to simplify the process.
- **Use of Public Funds for Donations**
  - Public funds should not be used for donations or purchase of silent auction items (e.g. area alumni association events)
  - These items should be purchased using non-tax funds or personal funds
- **Tax Rate Reminders**
  - As a reminder:
  - We should only be giving information that helps the EDB make decisions on their tax rates (revenues generated at various rates, expenditure budgets, 5 & 10 year plans, etc.)
  - We should not be recommending specific rates to the EDB
- **Loan/Lease Approval**
  - Lease/Debt Approval – must be approved by DLG  
[http://kydlgweb.ky.gov/Entities/16\\_Debt.cfm](http://kydlgweb.ky.gov/Entities/16_Debt.cfm)
  - Notification of Intent to Finance Form – <https://kydlgweb.ky.gov/Documents/Debt/NotificationofIntenttoFinanceEDITABLE.pdf>

### **CAFE Office of Diversity**

- Mia Farrell – Assistant Dean for Diversity, Ashley Holt – Students & Staff
- Intercultural Awareness Day – October 22<sup>nd</sup>, 2019; Register by Friday, October 11<sup>th</sup>, 2019
- Jr. MANRRS Leadership Institute
- 8<sup>th</sup> Annual Kentucky Jr. MANNRS Leadership Institute Registration – due October 25<sup>th</sup>, 2019
  - See important MANNRS dates on PowerPoint

### **Reminder During Election Season**

- No campaigning or fundraising allowed

### **Dr. Jeff Young – Urban Extension Director**

- Focus on Public Relations, Needs Assessment, Program Development, Program Evaluation
- Extension in the City: How Extension is Impacting Larger Communities
  - October 18, 2019 at KSU Extension Building

### **New Hire Process and Reminders**

- The County office is responsible for seeing that all support staff positions are advertised in local newspaper:
  - Advertise for two (2) weeks
  - Send Cristin Sullivan a copy of the advertisement
- Interview Notes and the Hiring Report Form must be sent to District office (c/o Cristin Sullivan).

### **New Agent Orientation & Core Agent Training**

- New Agent Orientation – Nov 19-21, 2019 at Ag North Building
- Core Agent Training – Oct 16-18, 2019 at KSU Campus

### **Performance Evaluations for Bi-Weekly Staff**

- Dec 3, 2019 – Begin Self-Evaluation
- Jan 14, 2020 – Self-Evaluations Due

- Feb 11, 2020 – 1:1 Meeting with Supervisors must be completed

### **Mid-Year Visits with Agents**

- Begin in November
- Watch for invitation via SignUpGenius

### **2020 National Epsilon Sigma Phi Membership Drive**

- The National ESP and the Alpha Kappa Chapter of Kentucky invites Extension Service professionals to join the membership of ESP for excellence in service and professional development.
- 2020 Membership Drive Kicks Off – Oct. 1, 2019
- Dues: Annual Member Renewal: \$70; New Members: \$80; Lifetime: \$220
- Deadline: Jan. 1, 2020

## **District Updates**

### **District Forum**

- No forum this year, please share with CEC and DB members

### **Harold Workman Ag Leadership Award**

- Award committee is soliciting nominations for an individual with distinguished service in the field of agriculture
- This award is a tribute to the men and women who have given unselfishly of their time and efforts in Service to Kentucky's Agriculture Industry
- Deadline: Nomination form is due by October 1, 2019
- Mail to: Sara Stivers, Senior Administrative Assistant  
Executive Office  
Kentucky Farm Bureau Federation  
P.O. Box 20700  
Louisville, KY 40250-0700

### **Holiday Staff Meeting**

- Carroll County Office to Host
- More details to come

### **County Review 2019-2020**

- Six Month Follow-up for those reviewed in 2019

### **Employee Accountability**

- Reporting work-related accidents and injuries for employees and volunteers
  - Contact Worker's Care
  - Contact Risk Management for volunteers
  - Complete Accident & Injury Form

### **Success Story Due Dates**

- 1st due October 10th
- 2nd due January 10th
- 3rd due April 10th
- 4th and 5th Due July 15, 2020

### **New 4 Year Plan of Work 2020-2024**

- Time to start working on next 4 Year Plan of Work
- Some counties should look at reducing number of Major Area of Programs

## **2019-2020 District Staff Meetings**

- October – No Meeting
- November 13<sup>th</sup>, 2019
- December 11<sup>th</sup>, 2019
- January – No Meeting
- February 12<sup>th</sup>, 2020
- March – 11<sup>th</sup>, 2020
- April – No Meeting
- May – 13<sup>th</sup>, 2020
- June – July – August – No Meeting

## **Program Area Meetings**

- Need a contact person to gather agenda items for district staff and send to DD
- 4-H Youth Development
  - State Update
  - National 4-H HQ/National 4-H Council
  - State Fair
  - Kentucky Volunteer Forum
  - Staffing Update
  - 4-H Camp
  - Achievement Application- Owen Prim
  - Horse Update-Kelly Smith & Lora Stewart
  - District Middle School Retreat: December 16-17 at North Central Camp; \$50- Shelley Meyer
  - District 3 Teen Council Meetings- Shelley Meyer
  - KVF Accreditation- Kelly Woods, Mollie Tichenor, Shelley Meyer
  - Camp Advisory- Steve Conrad & Shelley Meyer
  - District Communication Contest- Denise Donahue
  - KAE4-HA Board Meeting Concerns-Shelley Meyer and Joyce Doyle
  - Issues Conference 11/21-24 – deadline Oct. 11 online - \$215 – Paul Adkins
- ANR/Horticulture Update
  - ANR Update West – Warren County Extension Office – Oct 16 & 17
  - Kentucky Beef Conference – Fayette County Extension Office – Oct 21
  - ANR Update East – Clark County Extension Office – Oct 22 & 23
- Family & Consumer Sciences
  - State Staff Updates
  - Upcoming In-service Trainings
  - KEHA Announcements

Thanks to Carroll County Extension Office for hosting the district staff meeting.

Thank Boone and Bullitt Counties for providing morning refreshments.

## CALENDAR REMINDERS

### 2019:

9/15 – Tax Rates  
9/30 – SNAP-Ed Reports  
9/30 – Final Accounting Approval Form Due  
10/1 - Motor Vehicle/Watercraft Tax Form due to Frankfort with copy to DD  
10/1 – CAFÉ Internship Applications available  
10/10 – Deadline for September Travel  
10/10 – County Quarterly Payment Due to Dr. Young w/ copy to DD  
10/10 – 1<sup>st</sup> Success Story Due  
10/15 – Property Tax Rate Request Form  
October Staff Meeting - CANCELLED  
11/1 – 2 nominees to County Judge for EDB appointment  
11/10 – Deadline for October Travel  
11/13 – District 3 Staff Meeting (*Tentative*)  
November Date Pending – Final Accounting Sheets & Approval Form Due to Tina Ward w/ copy to DD  
November Date Pending – Equipment Inventory  
November Dates Pending – Mid-Year Conferences for Agents  
November Date Pending – Report to the People- Due to DD before Thanksgiving  
December Dates Pending – Mid-Year Conferences for Agents  
December Date Pending – D3 Holiday Staff Meeting  
12/1 – Report to the People “Final”  
12/3 – Support staff PE’s released through Success Factors  
12/11 – District 3 Staff Meeting (*Tentative*)  
12/10 – Deadline for November Travel  
12/15 – List of County Extension Council Officers to Dr. Young w/ copy to DD  
12/15 – State Extension Council Delegates Selected  
12/15 – District Board Members Appointed  
12/31 – CAFÉ Internship applications due

### 2020:

1/10 – Deadline for December Travel  
1/14 – Support Staff evaluations due online  
1/31 – All EDB officers must be elected  
2/10 – Deadline for January Travel  
2/11 – Supervisor and support staff face-to-face meetings due  
2/12 – District 3 Staff Meeting (*Tentative*)  
3/11 – District 3 Staff Meeting (*Tentative*)  
5/13 – District 3 Staff Meeting (*Tentative*)

Annual Due Dates/Timelines Calendar: <http://districts.ca.uky.edu/OfficeTools>  
[https://districts.ca.uky.edu/files/extension\\_annual\\_calendar\\_19-20.pdf](https://districts.ca.uky.edu/files/extension_annual_calendar_19-20.pdf)

November 13, 2019

December 11, 2019

February 12, 2020

March 11, 2020

May 13, 2020

**Cooperative Extension Service**  
Agriculture and Natural Resources  
Family and Consumer Sciences  
4-H Youth Development  
Community and Economic Development

Educational programs of Kentucky Cooperative Extension serve all people regardless of race, color, age, sex, religion, disability, or national origin. University of Kentucky, Kentucky State University, U.S. Department of Agriculture, and Kentucky Counties, Cooperating.

LEXINGTON, KY 40546



Disabilities  
accommodated  
with prior notification.