

District 3 Staff Meeting

May 8th, 2019

Carroll County Extension Office

Birthdays!!

May	June	July	August
Rachael Price- 5 th	Regina Browning- 9 th	Owen Prim- 11 th	Kelly Smith- 11 th
Kelly Woods- 9 th	Sherri Broderick- 12 th	Kendal Bowman- 20 th	Diane Mason- 26 th
Levi Berg- 10 th	Jane Proctor- 27 th	Lora Stewart- 25 th	
Cathy Jansen- 10 th			
Ruth Chowning- 14 th			
Willie Howard- 16 th			
Cathy Toole- 21 st			
Chanda Hall- 22 nd			
Mollie Tichenor- 24 th			
Shelia Fawbush- 29 th			



Personnel Updates

- Austin Dyer, D3 Administrative Support Staff
- Extension Director's Position – Dr. Laura Stephenson
 - Assistant Dean and Dept. Chair of FCS at the University of Tennessee.
 - Appointment starts August 1st.
- Extension IT Training Position
- Transfer – Paul Adkins from Boone 4-H to Bullitt 4-H
- Resignation – Kevin Perkins, Trimble County ANR
- Retirement – Judy Hetterman, Owen FCS – April 30th; Post-Retirement – May 6th
Chris Duncan, Oldham FCS – June 30th

Announcements & Celebrations

- Nebraska Disaster Relief Effort – Kendal Bowman
- Service Awards!

Service Awards

Years of Service



– Paul Adkins

5



– Rachael Price

5

Service Awards

Years of Service



– Sherri Broderick

10



– Samantha Gamblin

10

Service Awards

Years of Service



– Wayne Long

10



– Joyce Doyle

15

Service Awards

Years of Service



– Lora Stewart

15



– Chanda Hall

15

Service Awards

Years of Service



– Bryce Roberts

20



– Sherri Farley

25

Service Awards

Years of Service



– Valerie Holland

25



– David A. Hull

25

Summer Interns

- 35 summer interns will be starting in May!
- Rodeo will be at Good Barn on June 28th
- Roundup will be at Good Barn on July 19th

County	Intern
Boone	Randi Hensley
Boone	Deborah Meyers
Campbell	Connor Richardson
Shelby	Abigail Keairns
Shelby	Rachel Sibert
Spencer	Jaycie Heath
Trimble	Maranda Ward

NEP Update

Rosie Allen – Area NEP Agent

I.T. Update

Chris McKenzie – Computer Support
Specialist III

- Will be required starting July 17, 2019 in order to sign on to MyUK.
- Need a phone or mobile device.
- To enroll your phone or device in two-factor log-in, visit ItTakes2 for instructions and frequently asked questions. Once enrolled, you will be eligible for a 365-day passphrase.
 - See <https://www.uky.edu/its/ittakes2>
- Instructions for setting up a 365-day passphrase are also available at ItTakes2.
- For 24/7 immediate assistance, please contact ITS Customer Services at 859-218-HELP (4357) or visit the Technology Help Center at <http://techhelpcenter.uky.edu>. For assistance with non-urgent matters, email 218help@uky.edu.
- Poll employees without a phone or tablet to receive two-factor codes

• Guest Speaker - Planning & Reporting

Dr. Ken Jones, Director, Program & Staff Development

Deadlines:

- 2018-19 Plan of Work (POW) – complete submission online by June 30, 2019
- Affirmative Action Plan– complete submissions online by June 30, 2019
- Affirmative Action Report– complete submissions online by June 30, 2019
- In-Service Training Sign-up – All new in-services should be submitted into KERS before July 1, 2019.
- Monthly KERS Reports and Success Stories – Final 2018-19 Reports due July 15, 2019
- Program Indicator Report- due July 15, 2019 from all counties.
- (District Directors may have earlier due dates for their review and recommendations)

District Staff Meeting

Administrative Updates

 Cooperative
Extension Service

Innovative Program Sharing

- <https://youtu.be/U2wwwYnMxjg>

2019 Merit Increase

- A 2% merit pool has been proposed to the Board of Trustees
- BOT meets in June
- A standardized distribution based on performance rating will be developed for agents and support staff
- Differences will be effective July 1st and will show up on your July 2019 pay statement

County Facilitator Job Responsibilities

- County Facilitators are not responsible for County Extension Council and related items. (this includes POW, Civil Rights Plans and Reports...)
- Will continue with roles until new structure is in place.

HEMP

- Extension provides research-based information.
- As the research on hemp progresses, you can find updates here:
<https://hemp.ca.uky.edu/>
- New tools, like budget models, and the latest research are available through the hemp website.
- Agents that get questions about hemp should consult the website and reach out to Tom Keene or Bob Pearce with questions.

CBD

- Extension provides research-based information.
- Currently, there are no research-based tools, lessons or information for CBD oil.
- For questions, individuals should contact their health provider.
- Agents should never provide healthcare advice.
- Agents should never promote a brand or a person. Be wary of those marketing a product that ask for a platform to speak to Extension groups.
- Agents should use caution when talking about products that they use, as it can be seen as an endorsement for a certain product.

Political Participation Guidelines

- Policy #76: Political Activities and Public Office
- ...avoid conduct that might in any way lead members of the general public to conclude that he or she is using an official position to further professional or private interests or the interests of any members of his or her family...

High School Interns

- UK requires 14-17 year olds to be hired/employed through STEPS.
- STEPS monitors compliance with Child Labor Laws.

Concealed Carry

- No weapons on property leased, owned or occupied UK Employees.
- Weapons may be stored in private or official vehicles.
- Cannot be removed while on university properties mentioned above.

University New Employee Orientation (NEO)

- This is the Orientation all Regular UK employees (0.5 FTE or greater) must complete. It is in addition to new agent orientation, which new agents must also complete.
- Switching from in-person, on-campus New Employee Orientation (or Distance University New Employee Orientation Packet, if more than 40 miles from campus) to web-based new employee orientation effective **July 1, 2019.**
- New staff should automatically be assigned the course in myUK Learning.
- New Employee Orientation must be completed within 30 days of hire.
- Past due notifications will be sent to supervisor.
- A New Employee Website is being created to coincide with the new online orientation curriculum and will have links to related information on insurance, retirement, well-being, community, policies and compliance.

MS – Science Translation and Outreach Update

- Degree program approved by Council on Postsecondary Education and will be considered by full Board of Trustees soon.
- Must take GRE.
- Apply to Graduate School by August 2, 2019.
- Complete Agent Study Plan and submit to DD and Asst. Director.
- Start talking to specialist that might serve on Graduate Committee.

KEHA Voting Delegates

- See detailed handout from Kim Henken
- Work with counties without FCS agent

Extension Agent Leadership Development Training

- CLD offers many valuable in-service trainings opportunities
- Available to county and/or multi-county groups also

Justice for All Posters

- Blue – SNAP
- Red - General Office Use. In all areas where programming occurs.

Open Enrollment

- System is open for changes until May 10th
- New Health Plan – UK Saver (high deductible w/ HAS)
- Make changes through MYUK – Employee Self Service
- Check out Alex® at: <https://www.myalex.com/universityofkentucky/2019#intro>
- Check out the UK Open Enrollment Link on: <http://www.thempmgroupllc.com>

Intellectual Property Training

- Current employees: If you received an email from the Vice President of Research requesting that you complete the UK Intellectual Property (IP) Policy Training, please promptly complete the training if you have not done so already.
- All new employees: Must complete the “UK Intellectual Property (IP) Policy” training on myUK Learning.

Extension FCS Updates

- Rachel Gillespie has will join the FCS Extension Team on May 6th, as an Extension Associate for the Center for Disease Control High Obesity Project
- Senior Extension Associate Position for Clothing, Textiles, and Household Equipment. Please share the posting link: <https://ukjobs.uky.edu/postings/212180> . The position will be open until May 21st.

Extension FCS Updates

- KEHA Annual Meeting In-service Opportunities
- 2020 FCS agent training week will be held the week of February 17th – 21st.
- Mini-Grant Opportunity (All Program Areas) – May 15th due
- FCS Online Graduate Certificate – Fall 2019
 - FCS 600 - Foundations of Family and Consumer Sciences
 - FCS 620 Working with Diverse Families in Culturally Sensitive Contexts.

Extension FCS Updates

- Mental Health First Aid Certification -- District Trainings
 - District 1 May 28-29, 2019 West Liberty
 - District 2 April 10-11, 2019 Manchester
 - District 3 August 28-29, 2019 Bedford
 - District 4 May 22-23, 2019 Lexington
 - District 5 August 12-13, 2019 Campbellsville
 - District 6 September 12-13, 2019, Morgantown
 - District 7 July 30-31, 2019 Eddyville

Extension ANR Updates

Agents/Specialist Grants Awarded



9 Grants

\$2000
to
\$2500



24

ANR &
Horticulture
Agents
involved



12

Specialist
Involved



Lead Counties

Madison, Green,
Jefferson, Clay,
Hopkins, Mason,
Simpson, Bell, Owen

Extension ANR Updates



Extension ANR Updates

Agents On The Move

 New Agents hired 3	Agent transfers 4	 Agent retirements 2
Post retirement appts. 2	Agents in 110 of the 120 counties 	

Extension ANR Update



Extension 4-H Updates

- Youth Development Institute – contact Chuck Stamper if you are interested asap.
- PYD Certificate program has been approved
- Verified Volunteers – two issues
 - Higher than expected changes
 - “FCRA rights” checkbox

4-H Teen Conference

- The due date is May 3rd (next Friday) through 4-H Online. If any of the counties in your district do not have a 4-H Agent I ask that you share this information with them or connect us so I can ensure they have what they need to promote the program.
- All information can be found here: <https://4-h.ca.uky.edu/teenconference>

Extension 4-H Updates

- 4HOnline - It's no longer acceptable to simply use county@noemail.com as a default email. Make all effort to get valid individual and/or family email.
- 4-H College Study
 - An evaluation of the educational attainment and post-secondary experiences of 4-H members who have graduated from high school. Currently, we are allowing people to “opt out” of this evaluation by filling out an online questionnaire that provides their name/county.

Extension CEDIK Updates

- Partnering with College of Fine Arts
- Partnering with College of Design – Winchester Project
- Looking for communities in West KY to partner with.

College Diversity Office Updates

Unconscious Bias Training

- District 1 & 2: July 23rd in Quicksand
- District 3: April 10 from 10-12 in Carroll County
- District 6 & 7: May 20 from 10-12 in Hopkins County

District Staff Meeting

Business Operations Updates



Extension Business Operations

Chris Shotwell, Assistant Director for Extension Business Operations

Tina Ward, College Business Analyst

Ty Back, Fiscal Compliance Officer (EKY)

Jeremy Teal, Fiscal Compliance Officer (WKY)

QuickBooks Online Updates

- QBO Implementation
 - Training and conversion has been paused for two primary reasons:
 - Inuit has changed the tiers offered
 - Slight delays in getting D1 and D2 converted and supported
 - Once the dust settles, we will pick up training and continue with implementation across the state
 - More info will be shared once we have updated our training plans

QuickBooks Online Updates

- QBO Plan Changes
 - QBO Plus was the top tier when we started this process
 - Intuit found that some companies were gaming the system and running hundreds of business in one instance of QBO Plus
 - Limits to CoA and Classes are being implemented in QBO Plus
 - These limits are going to affect many of our counties who are already using more accounts and classes than permitted

QuickBooks Online Updates

- QBO Plan Changes
 - New top tier has been added – QBO Advanced
 - Unlimited CoA and Classes
 - Improved reporting capabilities
 - No functional change to how system works
 - Details being finalized on additional costs for QBO Advanced
 - Working to find funds on campus to cover the additional costs
 - New price lock will be extended to us by Inuit

QuickBooks Online Updates

- Delays in D1 & D2
 - Budget process took us away from getting D1 converted as quickly as we would have liked
 - Numerous issues found while converting counties resulted in a slower process than expected
 - D1 & D2 are mostly converted and using the system
 - A handful of remaining issues are still being worked out
 - Working to develop better support for counties online

Travel Updates

- CONCUR
 - Tina Ward and Chris Shotwell are serving on the campus-wide team
 - First task was to update travel policies and procedures
 - Significant changes made to portions of the P&P
 - Written to serve us better once we are using CONCUR
 - Offers more streamlined and efficient procedures
 - Document goes from 17 pgs to 8 pgs

Travel Updates

- CONCUR

- Draft implementation timeline:

- Now thru Early Fall: Consultants will work on configuration of CONCUR (20 weeks)
 - November thru December 2019: Piloting of new system
 - We will ask for counties to pilot (1 per district)
 - Will help us to learn the system and to better prepare for training
 - January 2020: Go Live

- **Note: Timeline is subject to change**

Travel Updates

- Policy Updates

- A Blanket Business Procedure Exception request was recently approved by the Controller's Office (see email sent by District Director).
- If a traveler has no personal expenses that need reimbursed, a travel expense report for zero reimbursement is not required in the UK TRIP system (e.g. county vehicle used and all other travel expenses were paid by the county).
- If a traveler has any personal expenses that need reimbursed, a travel expense report must be submitted along with all receipts and required documentation regardless of who paid the expenses (e.g. 3rd party receipts).

Travel Updates

- Policy Updates

- Cost comparisons are **not required** for airline tickets purchased from an alternate vendor when the ticket costs **less than \$500**. A copy of the approved business procedure exception (see email) must be included with the employee's travel expense report if an alternate vendor is used and the ticket costs less than \$500.
- Cost comparisons are **required** for airline tickets purchased for trips that **combine business with personal travel** and the airline ticket must be **paid for with personal funds**. Care should be given to ensure the county does not pay for travel expenses related to the personal portion of the trip (personal lodging, meals, rentals, etc).

Travel Updates

- Professional Improvement: Updated Definition
 - These funds are only to be used for dues, travel, subsistence, and registration fees for involvement in the approved state and national professional associations.
 - PI funds should only be budgeted when all other obligations are met (staff salaries & benefits, program support, travel, office operations, etc).

Travel Updates

- Professional Improvement: Updated Definition
 - For annual budgeting purposes, PI is limited to \$3,500 per agent and \$1,500 per support staff.
 - For those agents who participate in Epsilon Sigma Phi, the county may allocate up to \$1,000 in additional PI funds.
 - Any other use of PI funds is prohibited without prior approval from the respective District Director.

Travel Updates

- Professional Improvement: Updated Definition
 - Fine Arts Agents do not have state and national associations like other program areas. Their district director and program area leader will help identify appropriate professional improvement opportunities.
 - Professional Improvement Funds cannot be used to pay for tuition of courses offered as college credit.
 - Likewise, PI funds cannot be used to pay for an individual's Rotary, Kiwanis or other professional, civic or association dues.

Travel Updates

- Professional Improvement: Updated Definition

- Approved Agent Associations

- KACAA & NACAA
 - KAE4-HA & NAE4-HA
 - KEAFCS & NEAFCS
 - ESP (State & National)
 - JCEP

- Approved Support Staff Associations

- ChiES

Travel Updates

- Personal Vehicle Mileage Logs
 - In order to keep county travel and professional improvement separate in TRIP and to assist with separate accounting in the county, logs have been updated to provide a separate table for each.
 - If an employee has **both** in a given month, a **separate** “day trip” travel expense report **should be submitted** in TRIP for accounting of each separately budgeted line item.

May 2019, Mileage Log Page 1 of 1

University of Kentucky
College of Agriculture,
Food and Environment

May 2019
Personal Vehicle
Mileage Log
Day Trips

Extension Agent
Wildcat County CES (demo only)

County Funded Travel:

Date	Starting Location	Destination(s)	Business Purpose	Program	Mileage
	Workplace	Walmart	Purchase supplies for 4-H youth program	4-H	15
	Workplace	County Middle School	4-H Youth Leadership training	4-H	10

Total County Funded Travel (separate travel report required): 25

Professional Improvement Travel:

Date	Starting Location	Destination(s)	Business Purpose	Program	Mileage
	Workplace	Embassy Suites, Lexington, KY	State 4-H Association Meeting	4-H	150

Total Professional Improvement Travel (separate travel report required): 150

Authorized Reviewer Printed Name _____

Employee Signature & Date _____

Authorized Reviewer Signature & Date _____

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Travel Updates

- Personal Vehicle Mileage Logs
 - “Purpose of trip” code 00 – Collaboration/Meeting will be used for county travel
 - “Purpose of trip” code 01 – Conference/Training will be used for professional improvement
 - Overnight trips should not be affected.

Travel Updates

- County Vehicle Mileage Logs
 - As we continue to increase accountability and improve stewardship of local public funds, a county vehicle mileage log is being implemented effective immediately.
 - Starting with May travel which will be reviewed in June.
 - This new vehicle log will be kept in KERS and must be used by any employee driving a county owned vehicle.

Travel Updates

- County Vehicle Mileage Logs
 - Purpose for the new county vehicle log:
 - Increase accountability related to the use of county owned vehicles.
 - Document destinations and business purposes for all employee travel.
 - Ensure county vehicles are used solely for purposes related to extension programming.
 - Ensure personal use of county vehicles is handled appropriately as per IRS regulations.
 - Provide data to the district board regarding the cost effectiveness of the county owned vehicles.

Travel Updates

- County Vehicle Mileage Logs

- Guidelines for county vehicles:

- All UK employees and certified volunteers permitted to drive county vehicles must have a University of Kentucky Motor Vehicle Record (MVR) on file with UK Risk Management.
 - Any personal usage of county owned vehicles could be considered a taxable fringe benefit by IRS definition.
 - According to the IRS, personal use of a vehicle is all use that is not for your trade or business.
 - If necessary, a county may choose to invoke the IRS “commuting rule” for miles driven to/from home and work (see IRS regulations or consult you local tax professional)

Travel Updates

- County Vehicle Mileage Logs
 - Procedure for filling out the mileage log and for month-end review:
 1. County vehicle mileage records will be recorded in KERS using the new [Mileage Records County Vehicle](#) button.



Travel Updates

- County Vehicle Mileage Logs
 - Procedure for filling out the mileage log and for month-end review:
 2. At the end of the month, the County Vehicle Mileage Log will be **printed and signed** by the employee who drove the vehicle.

(Revised 8/2018), May 2019, Mileage Log Page 1 of 1

 University of Kentucky
College of Agriculture,
Food and Environment

May 2019
County Vehicle
Mileage Log
Day Trips

~~Reimbursable~~
Extension Agent
Wildcat County CES (demo only)

County Vehicle Mileage (Not Reimbursed):

Date	Vehicle Name	Starting Location	Destination(s)	Business Purpose	Program	Mileage
05/01/2019(Wed)	White Truck	Workplace	Walmart	Purchase supplies for 4-H youth program	4-H	15
05/01/2019(Wed)	White Truck	Workplace	County Middle School	4-H Youth Leadership training	4-H	10

Total County Vehicle Mileage (Not Reimbursed): 25

Reimbursable

Authorized Reviewer Printed Name

Employee Signature & Date

Authorized Reviewer Signature & Date

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Travel Updates

- County Vehicle Mileage Logs
 - Procedure for filling out the mileage log and for month-end review:
 3. The signed log is then provided to the County Fiscal Contact for review (documented via signature).
 4. Once reviewed by the County Fiscal Contact, the log will be scanned and submitted to the respective District Director who will review, approve (via signature) and return a copy of the fully reviewed log to the county office.

Note: The County Vehicle Mileage Log will **not be submitted in TRIP** as these miles are **not reimbursed to employees.**

Travel Updates

- As per UK year-end Deadlines:
 - Travel Expense Reports for June (or previous) travel must be submitted by July 3rd to ensure posting to “Old Year”
 - Ensures travel is posted to “Old Year” in University records for accounting and billing purposes
 - Ensures travel is posted to “Old Year” in County records for accounting and budgeting purposes
 - Any expense reports for June travel that are not posted to “Old Year” in UK’s system will be included in the Q1 billing for FY20 (to be sent in Oct) and ultimately charged to “New Year” budgets.

Compliance Updates

- Trainings & Presentations Website
 - In an effort to keep training materials and presentations updated, we have made some changes to our website:
 - Specific subject area training materials and presentations provided
 - Updated list of trainings and presentations completed over last 2 years
 - Prevents UKIA from finding conflicting or outdated information
 - <http://cafebusinesscenter.ca.uky.edu/training-qrg>

Trainings & Presentations

1. Business Operations 101
2. Cash Handling
3. Purchasing & Disbursements
4. Travel Reimbursements
5. Equipment Inventory
6. QuickBooks Online
7. County Budget Process
8. Volunteer Groups
9. Meetings & Presentations

Compliance Updates

- Business Operations Manual
 - Draft has been submitted to leadership for review and revision
 - It will eventually be incorporated into one Extension Manual
 - Used existing guidelines and procedures
 - Updated existing guidelines and procedures
 - Added some new guidelines and procedures
 - District Directors will be given opportunity to review
 - UKIA and DLG will also be given opportunity to review

Compliance Updates

- Standardized Forms
 - New forms **must be used** effective **July 1, 2019**
 - Payment Voucher
 - Daily Receipts Log
 - Safekeeping Device Log
 - Used numerous sample forms from counties along with forms used on campus to develop new forms
 - New forms can be found on websites
 - http://cafebusinesscenter.ca.uky.edu/efo_forms

Training Topic – Payment Voucher

Purchase Date: Enter the date of purchase.

Purchaser Name: Enter the name of the individual who made the purchase.

Vendor Name: Enter the name of the vendor where the purchase was made (e.g. Wal-Mart, Lowe's, etc.)

Amount: Enter the amount of the purchase (total amount shown on receipt or invoice)

Person Submitting Form: Enter the name of the individual who is submitting the form (in some cases this may be an agent completing the form on behalf of a volunteer).


Paid By: Enter the source of funds covering the expense (EDB, 4-H, etc.).

Check Payable to: Enter the name of the individual or company to which this payment is due.

Method of Payment: Select the box most pertinent to the nature of this purchase.

Items Purchased: Enter a brief list of the items purchased (avoid using general terms such as supplies; and add specific detail, especially for higher end items or services)

Business Purpose: Enter a brief description justifying the need for the purchase to explain how the goods/services will be used in Extension.

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

PAYMENT/REIMBURSEMENT VOUCHER

County Wildcat County
(Attach original itemized receipt/invoice)

BASIC PURCHASE INFO	
Purchase Date: <u>4/11/19</u>	Person Submitting Form: <u>John Smith</u>
Purchaser Name: <u>John Smith</u>	Paid By (EDB, 4-H, etc): <u>EDB</u>
Vendor Name: <u>Dollar General</u>	Check Payable to: <u>John Smith</u>
Amount: <u>53.28</u>	<input checked="" type="checkbox"/> Personal Funds <input type="checkbox"/> Credit Card/Charge Account <input type="checkbox"/> Invoice/Bill
Items Purchased: <u>Rice, Aluminum Foil, Dish washing liquid, Plastic containers</u>	Business Purpose: <u>Supplies for 4-H after-school programming at Wildcat County Middle School</u>

****Attach original itemized receipt/invoice****

Training Topic – Payment Voucher

Pre-Authorization Section

In certain circumstances, unbudgeted/emergency purchases must be made. **These purchases must be made according to existing Board/Council policies.**

Pre-authorization should be documented for these situations via signature from the associated Board Chair or Treasurer.

Approval Signatures Section

Purchaser Signature: Signature of the individual who purchased the goods/services.

Supervising Agent Signature: Signature of the supervising agent for purchases made by a program assistant (if applicable).

Fiscal Contact (or Delegate) Signature: Signature of the fiscal contact for the office, or delegate in his/her absence.

1 PRE-AUTHORIZATION

SEE DISTRICT BOARD POLICIES FOR PRE-AUTH REQUIREMENTS

EXPLAIN ANY EMERGENCY PURCHASES MADE W/O PRE-AUTHORIZATION IN BUSINESS PURPOSE ABOVE

Board Chair/Treasurer Date

2 APPROVAL SIGNATURES

Purchaser Signature Date

Supervising Agent Signature (if applicable) Date

Fiscal Contact (or Delegate) Signature Date

Training Topic – Payment Voucher

Line Items Section (right side of form)

- Information provided on the right side is provided to **aid in assigning the proper G/L Accounts** for Accounting Purposes.
- Fiscal Contact should review the payment voucher to ensure the proper G/L is selected.
- Staff Assistant entering transaction into accounting system should also review to ensure the proper G/L is being used.

Line Items

Program Support

- 4-H
- ANR
- FCS
- Other _____

Travel

- 4-H
- ANR
- FCS
- Other _____

Prof Improv

- 4-H
- ANR
- FCS
- Other _____

Contracted Svcs

- Prof Services
- Maint & Repair
- Rents & Leases
- Insurance
- Equipment Repair
- Vehicle Insurance
- Vehicle Repair
- Electric
- Gas
- Water
- Sanitation/Sewer
- Telephone
- Internet
- Cable
- Other _____

Materials & Supplies

- Mkt & Spec Prog
- Supplies & Svcs
- Postage
- Publications
- Janitorial Supplies
- Other _____

Administration

- Dues & Subscrip
- Board Expense
- Bookkeeping
- Cell Phones
- Other _____

Capital Outlay

- Equipment
- Vehicle
- Other _____

Training Topic – Payment Voucher

- Authorization of Purchases & Disbursements
 - The Fiscal Contact authorizing a purchase or expenditure is responsible to assure funds are available for payment of all obligations made under this authority.
 - Each Payment Voucher should be reviewed and signed by the Fiscal Contact before the check is written
 - When reviewing the voucher,
 - Is the expenditure allowable & reasonable?
 - Is the expenditure coded to the correct line item?
 - Are there adequate funds budgeted to cover the expense?

Training Topic – Safekeeping Device Log

Safekeeping Device Log:

- Log should be kept with the safekeeping device to record all openings and closings.
- Log would be referenced in the case of a discrepancy.
- Two people should be present each time the safekeeping device is accessed.
- Log should be completed with the following information at each opening: Date; Time; Initials for the two people present at opening; amount entered or removed; and purpose for entry.



Safekeeping Device Log

County _____

Note: When the safekeeping device is accessed, there must be two people present and both must initial the log.

Date	Time	Individual #1 Initials	Individual #2 Initials	Amount (+/-)	Purpose for Entry

Questions



Tax Exemptions

- Remember that counties cannot use UK's EIN/Tax Exemption.
- Either use the Extension District Board's Tax Exempt number or Program Council Tax Exemption if they have 501c3 non-profit status. (Financial Guidelines for CES County Volunteer Groups – Tax Exemption Status Overview)

<http://ces-manuals.ca.uky.edu/content/financial-guidelines-ces-county-volunteer-groups>

Professional Improvement Day Trips

- Day travel for professional development association business or activities should be coded as County Travel.

District Staff Meeting

District Updates

 Cooperative
Extension Service

Budget

- Thank you to your county budget information in to the DD office.
- UFIR Deadline Extended to May 15
- Budget Signed Hardcopies - 3 original signed hardcopies due to D3 Office
- Fiscal Year SPGE Budgets
 - Due to DD by May 15th
 - DLG website by June 30th

County Coordinator Lists

- Signed forms to District Director due by June 1st
- http://districts.ca.uky.edu/files/co_coordinator_list_form_12.2016.pdf
- Each county should have a trained I9 Signer in the office; If not, please get with (District Support) to schedule a training.

Career Ladder Advancements

- Congratulations to those who received the advancement on the Career Ladder!
- Level II – Bethany Pratt & Rachael Price; Level III – Corrine Belton, Shelley Meyer & Michelle Simon; Level IV – Traci Missun; Level V – Christy Eastwood, Bryce Roberts & Cathy Toole
- Salary Increases July 1st, 2019

Leave Request

- Be proactive in submitting leave in MYUK for approval
- Take old leave before June 30, 2019 or donate to Shared Leave Pool
- Interested in Shared Leave Pool? Check out the UKHR Benefits!

District 3 Support Staff Training

- Wednesday, May 15th, @ GameWorks in Newport, Ky.
- Accepting Late Registrations- Form & Payment must be submitted ASAP – Henry County
- Registration and refreshments will open at 9:00 a.m.

Employee Accountability

- Dress Code – Professional Attire
 - Level 1 – Business Professional
 - Level 2 – Business Casual
 - Level 3 – Extension Casual
 - Unacceptable
- Agent Safety
 - Additional PowerPoint

Kentucky State Fair 2018

- Need a replacement in Rabbits Category for Kevin Perkins.
- KDA teaming with Extension to provide drop-off locations for Open Class State Fair Exhibit Entry
- Pick Up Locations: Christian, Laurel, McCracken, Montgomery and Taylor
- Deadline to register July 10th

Live Well Check-in Health Screening

- Thanks to all of you for taking the time to participate in the screening
- 67 employees participated; 36 (Grant) and 29 (Shelby)

National Urban Extension Conference

- 2019 Conference May 20-23. Seattle, Washington.
- A number of agents from D3 and other districts attending!

County Program Reviews

- 2019: Oldham & Shelby

Performance Evaluations

- All agents working over a year and County Managers will be reviewed this year.
- **June 1st** – SAP/Performance Factors Open for Agent and Manager Self Evaluations
- **August 1st** - All Agent Self Evaluations and 4-H Access/ES-237 Report submitted
- **September 13th** - District Directors or County Managers will review all documents and complete agent (and manager) PE's in SAP/Success Factors.
- **February 15th** – One on One Meetings with Agents Complete

State Extension Council Meeting

- August 7, 2019 @ at the Kentucky State University Research Farm, 1525 Mills Lane, Frankfort, KY
- Available Hotels in Frankfort - Best Western Parkside Inn, Fairfield Inn & Suites by Marriott Frankfort & Home2 Suites by Hilton (new and very nice)

Success Stories

- Due Quarterly (October 10th, January 10th, April 10th and (x2) July 15th)
- July 15: Final 2 Stories Due in KERS

Upcoming Due Dates

- Priority Indicator and Featured Programs Report-Due by July 15th
- Program Support Actual Expenditures to EDB & DD-Due by July 15th
- Open Enrollment – UK Benefits ends May 10th
- Plan of Work-Final Draft due into KERS by June 30th
- Affirmative Action Plan-Rough Draft to DD by May 15th and final due June 30th (KERS)
- Affirmative Action Report-Due by June 30th (KERS)
- County Coordinators Form- June 30th
- Final Monthly KERS Reports Due-July 15th
- Final 2 Success Stories Due by July 15th

Upcoming Due Dates

- Agent Self-Evaluations Due Date -TBA
- ES-237/ 4-H Enrollment Report Submitted Due August 1st (All agents & assistants need to give youth numbers to 4-H for this report. It is a county youth report. Must include all work with youth-6 hours or more.)
- Actual Income & Expenditures due to DD by August 15th for Review
- Actual Income & Expenditures uploaded to DLG by September 1st
- Publish statement in local paper regarding financial reports by September 1st
- Tax rate forms due to DD (set tax rates in late July or August) by September 15th

Program Area Meetings

- 4-H
- FCS
- ANR

Thank you!

Carroll County for Hosting!
Spencer & Trimble for Refreshments!