



# New Extension Agent:

## *Onboarding Self-Study Guide*

Name: \_\_\_\_\_

Title: \_\_\_\_\_ County: \_\_\_\_\_

Date Received: \_\_\_\_\_ Date Completed: \_\_\_\_\_

**Revised: June 2023 - Eleanor Baker, NC State University**

*Note from Eleanor: Extension Organizational Development is in the process of overhauling this resource guide. In the meantime, we have fixed broken links and made other small edits. If you have any questions or would like additional information, please email [eafrede2@ncsu.edu](mailto:eafrede2@ncsu.edu)*

# ACKNOWLEDGEMENTS

## ARE EXTENDED TO THE NUMBER OF EXTENSION PROFESSIONALS WHO CONTRIBUTED TO THE INITIAL DEVELOPMENT AND THE SUBSEQUENT DEVELOPMENT OF THE NORTH CAROLINA FIELD AGENT SELF-STUDY GUIDE

A special thanks is extended to ***Everett Davis*** (former NC State Robeson County Extension Director) who, in 2002, initially conceptualize and developed his version of the self-study guide. An initial version was developed in 2005 for statewide use and has since been updated and revised to address organizational changes and needs.

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Dr. Wanda Sykes  
Mr. Keith Walters  
Ms. Natalie Wayne  
Dr. Sandy Wiggins  
Ms. Katherine Williams

# Onboarding Self-Study Guide Expectations and Agreement

## Agent:

- I understand that I am responsible for my own growth and development in a learner-focused system. My learning will be a monitored, continuous and interactive process.
- I will develop and maintain an effective working relationship with my supervisor that will allow successful onboarding to the organization to take place. In addition, I will develop working relationships with specialists and colleagues in order to facilitate my overall professional onboarding and development.
- I have reviewed my responsibilities based on established timelines and with my supervisor's guidance. I will share the completed guide with my supervisor and keep it in my files to serve as a reference.

## County Extension Director (or assigned):

- I will provide the time and the environment for the agent to grow and develop.
- I will help lead and manage the tasks outlined for the agent in the study manual.
- I will maintain confidentiality while offering suggestions and advice during the onboarding process.
- I will be committed to this agent's growth and the onboarding process.

Signature:

\_\_\_\_\_

\_\_\_\_\_

(Agent)

(CED)

Date:

\_\_\_\_\_

**For direct supervisors:** An optional check list for each learning objective has been provided for your use in the appendix of this document)

# Check List for Objective Completion

**This section is completed during the first two weeks of employment with CED (or as assigned).**

Please work with your supervisor to determine target dates for completion of the modules contained in the self-study guide. The supervisor and the new Extension professional need to discuss the sequence of these objectives while basing them on the external needs of the new professional's anticipated client base and current competency level. It is expected that the self-study guide will be completed within the first year of employment.

1. Objective 1: Acquire an understanding of office procedures, and NC State or NC A&T State and County Policies and Procedures.

Target Date:

Date Completed:

2. Objective 2: Develop knowledge of Extension and its philosophy, mission, and functions.

Target Date:

Date Completed:

3. Objective 3: Learn about your area of responsibility, its people, and its resources.

Target Date:

Date Completed:

4. Objective 4: Gain an understanding of your own position, responsibilities, and relationships with others in the Extension organization.

Target Date:

Date Completed:

5. Objective 5: Become knowledgeable about affirmative action legislation and requirements of Extension.

Target Date:

Date Completed:

6. Objective 6: Develop an educational program based on clientele needs.

Target Date:

Date Completed:

7. Objective 7: Learn the role of advisory committees and volunteers, how to facilitate productive meetings, and recruit effective members.

Target Date:

Date Completed:

8. Objective 8: Learn how to manage the Extension Reporting System, to write effective impact statements and success stories to market yourself and your programs.

Target Date:

Date Completed:

9. Objective 9: Gain an understanding of opportunities for professional improvement.

Target Date:

Date Completed:

10. Objective 10: Develop a Learning Network (LN) and Learning Development Plan (LDP).

Target Date:

Date Completed:

11. Objective 11: Present to your county staff a one-hour oral presentation (template provided).

Target Date:

Date Completed:

# **Welcome to North Carolina Cooperative Extension!**

Beginning a new job can be an exciting adventure with some level of apprehension. There is much to learn and what will seem like a limited time to learn it all. North Carolina Extension is a vast organization with a distinct mission and vision. Your County Extension Director (CED), District Extension Director (DED), or Regional Extension Directors (RED), and campus specialist (including extension associates), are available to help you succeed in your new role. Our promise to you is that we, as an organization, will provide you with the tools to achieve your programming and professional development efforts.

This self-study guide has been prepared by a committee of your peers and Extension Organizational Development (EOD) to aid you in becoming familiar with the organization and its onboarding objectives. It outlines learning experiences to help you become acquainted with your job, its people, and the organization. By completing this self-study guide you will be able to understand how successful educational programs are planned, realize the value of partnerships within your county and developing working relationships early on, and the importance of how to measure the impacts of your educational programs.

Most importantly this guide can help you discover a passion for Extension work and establish the foundational knowledge and skills that will ensure a stimulating and rewarding career with N.C. Cooperative Extension. Please know how glad we are to have you as the newest member of the North Carolina Cooperative Extension Family!

## **North Carolina Cooperative Extension Onboarding Process: An Introduction**

Because you will need assistance and advice in understanding the responsibilities of your new job, your onboarding is fundamentally a cooperative effort between your direct supervisor and you. You will need help locating references and finding resource persons. You will also need time for discussion with others as identified such as your peers, specialists and other campus-based professionals, and community members.

This onboarding field guide is divided into a series of learning modules that can be completed each month or sooner, depending on the completed checklist time-frame agreed to by you and your supervisor. The self-study guide presents assignments you are expected to complete during your first year. The assignments are grouped under twelve learning objectives, each relating to some area of required knowledge or skill. You will also find the manual has been designed to be a resource for you to refer back to from time to time during your Extension career so please ensure you keep this document once completed.

It is your responsibility to follow the guide and complete the learning modules in a timely manner as advised by your County Extension Director (CED). Each objective is stated at the top of a page, followed by key points for study and discussion,

assignments, sources of help, and useful references. Here is how to proceed with each objective:

1. Read the objective to understand what you are expected to learn.
2. Become familiar with, review and/or read all of the suggested references available. Some of the references will be found in your office while others will be available online.
3. Refer to the key points for study and discussion as you complete the readings and assignments. Discussing the key points with your supervisor and other coworkers and asking questions of clarification will enhance your learning experience and onboarding to the organization.
4. When you complete the reading and assignments, enter the completion date in the space provided.
5. Keep all your written work and field guide available for your own reference. The guide sequence is in a logical recommended order; however, you may complete the objectives in any order you and your County Extension Director (CED) deem appropriate.

You have joined an organization that believes in the importance of lifelong learning in a changing society. The North Carolina Cooperative Extension Onboarding Program is intended to help you *begin* learning for a productive and satisfying career. ***Again, our warmest welcome to North Carolina Cooperative Extension!***

# OBJECTIVE 1

## *Acquire an Understanding of Office Procedures, and NC State and County Policies and Procedures*

### Key Points for Discussion and Study

- Routine Procedures Crucial to Effective Extension Work

### Assignments

<b>Getting the Job Done</b>	This section deals with things an employee must know and understand to accomplish the day-to-day job of being an Extension professional. Record date when completed and indicate questions/remarks as applicable.
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#### Office Procedures

	<u>Date Completed</u>	<u>Questions/Remarks</u>
<b>EXAMPLE</b>		
Tour and become familiar with work facility (keys, security, parking, emergency numbers . . .)	e.g., June 1, 2023	e.g., Meeting, mail, rest, break, supply rooms.
1. Get expectations about office hours, work hours, time documentation, staff conferences, leave requirements, breaks, and professional scheduling	_____	_____
2. How do you locate and check out equipment? What are the policies on computer usage? Vehicle usage?	_____	_____
3. Observe and understand techniques used in answering and referring telephone calls.	_____	_____
4. Observe techniques in talking to an office visitor. Participate in an office visit.	_____	_____
5. What are Extension's Community Standards? What is considered appropriate dress in the office or in the field.	_____	_____



**Personal Visits or Other Personal Contacts**

	<u>Date Completed</u>	<u>Questions/Remarks</u>
1. Make several visits or other personal contacts with peers and specialists to observe procedures and techniques used. Be sure to visit demonstrations where appropriate.	_____	_____
2. Make some visits or contacts alone. Answer and relay telephone calls.	_____	_____
3. Set up for Computer Usage: Meet with your office IT contact and get started on setting up to use your computer (i.e., email, unity ID...).	_____	_____

**Letters and the Mailing Procedures**

1. Individual		
a. Observe another agent's email management for one day, how they have organized their folders and how quickly responses are given.	<u>Date Completed</u>	<u>Questions/Remarks</u>
b. Study correct business letter form.	_____	_____
c. Study civil rights compliance materials.	_____	_____
2. Letters		
a. Read and analyze some recent letters written by agents in your county.	_____	_____
b. Get an understanding of mailing procedures and guidelines.	_____	_____

**Topics to be Discussed with Your CED** (or assigned). CED may add additional topics for discussion and can [let us know](#) if any additional topics should be added to this section.

Policies, procedures, and processes:

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[Administrative Information](#) (CES Strategic Plan for NC State and NC A&T State, Organizational Chart, Commitment to Diversity, & Administrative Updates)

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[Branding and Marketing Information](#)

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[Civil Rights Checklist and Information for Review](#)

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[Community Standards](#) (dress code, professional scheduling, etc.)

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[Computer Use Policies for NCSU](#)

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Equal Opportunity Guidelines

    USDA-NIFA civil rights and equal employment resources

    N.C. A&T State University | Equal Employment Opportunity/Affirmative Action

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[Extension Publication Catalog](#)

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[Extension and NC State Technology Applications](#) (Zoom, Active Campaign, Eventbrite, etc.)

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[Extension Learning Management System \(XLMS\)](#) link requires sign on with Unity ID

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[Extension Reporting System](#) (ERS)

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[Extension Stats and Strengths](#)

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[My Pack Portal link](#) requires sign on with Unity ID

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[NC State University Policies and Procedures](#)

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[One-Stop Shop Components](#): ERS, XPM, Title Promotion

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[Professional Development](#)

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[Social Media Best Practices](#)

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[Title Promotion Information](#)

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[Travel Resources for NCSU employees](#) click on “Access Training and Guidance,” log in with Unity ID, and scroll to the bottom of the page for Extension-specific resources

[Vacation and Sick Leave for NCSU employees](#) and [Other Types of Leave](#)

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[Website Information & Google Analytics](#)

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## OBJECTIVE 2

### *Develop Knowledge of Extension and Its Philosophy, Mission, and Functions*

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#### **Key Points for Discussion and Study**

- Extension Mission: North Carolina Cooperative Extension is an educational partnership helping people put research-based knowledge to work for economic prosperity, environmental stewardship, and an improved quality of life.
- [How Extension Works - NC State Extension](#)
- [Cooperative Extension at NC A&T State University](#)
- [Extension Strategic Plan](#)
- [History of Cooperative Extension in North Carolina](#)
- [More history, list of Land-Grant Universities \(1862, 1890, and 1994\)](#)
- [Extension Organizational Development](#)
- [County Commissioners](#)

#### **Assignment**

<b>Organization And Personnel</b>	Each Extension professional, whether on campus or in the field, needs to understand how NCCE is organized at the state and county levels and the responsibilities of his or her particular job. It also is important to be acquainted with organizations in your area that assist with carrying out the area program.
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#### **Suggested References**

- Organizational Charts, NC State and NCA&T State
- Local Extension Agents
- Job Descriptions
- Records on File
- Extension Personnel Directory
- NC State and NC A&T State Personnel Directory

# County Operations Administrative Teams

## Position – NC State Cooperative Extension Service (1862)

### NC State University – NC Cooperative Extension (NCCE)

Dr. Rich Bonanno, Director

Ms. Kelley Hiemstra, District Extension Director, West District

Mr. Tyrone Fisher, District Extension Director, North Central District

Mr. Keith Walters, District Extension Director, South Central District

Mr. Dalton Dockery, District Extension Director, Southeast District

Mr. Art Bradley, District Extension Director, Northeast District

### Program Leaders, NC State University

Dr. Mike Yoder, State Program Leader, 4-H & Youth Development

Dr. Sarah Kirby, State Program Leader, Family & Consumer Sciences

Dr. Dale Monks, State Program Leader, Agriculture and Natural Resources

## Position – NC State Cooperative Extension Program (1890)

### NC A&T State University – NC Cooperative Extension Program (NCCEP)

Dr. Ray McKinnie, Administrator

Dr. Claudette Smith, Associate Administrator

Ms. Lonnette Marsh, Western Regional Program Coordinator

Dr. Shannon Wiley, Interim Eastern Regional Program Coordinator

### Program Leaders, NC A&T State University

Dr. Mark Blevins, Assistant Extension Administrator, Agriculture and Natural Resources

Dr. Claudette Smith, Interim Program Leader, Family & Consumer Sciences, 4-H & Youth Development and Community & Rural Development

The names and titles of Extension specialists at NC State and NC A&T with whom you likely will work:

Name	Title/Email/Phone
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## Information on Area Organizations and Key Leaders

Use the following outline to obtain information about organizations and individuals in your area. Write "n/a" in blanks where condition is not applicable.

### Extension Professionals

Name	Title and Email	Major job responsibility
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Extension Admin Professionals with whom you will be working

Name	Email	Major job responsibility
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Advisory Leadership/Strategic Planning Council

	Name	Telephone
Chair	_____	_____
Vice-chair	_____	_____
Secretary	_____	_____
	_____	_____

Subcommittee individuals that are program/specialized/issue based

_____	_____
_____	_____
_____	_____
_____	_____

**County Commissioners**

Chair(s): \_\_\_\_\_

Commissioners: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**County Manager(s)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Your State Legislators**

Name	Title	Contact Information
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Your U.S. Congressional Representatives and Senators**

Name	Title	Contact Information
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Soil and Water Conservation District (SWCD)**

Name	Address	Area represented
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Public Schools**

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**County School Superintendent(s)**

Name

Contact Information

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**Private Schools in the Area**

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**Community Colleges in the Area**

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**Universities in the Area**

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**Officers or Other Key Leaders in Major Civic Organizations in the Area**

Organization	Name	Address
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Officers or Key Leaders in Other Professional Organizations or Special Interest Groups in the Area Including Civic Clubs**

Organization	Name	Address
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Sources of Help**

- Your County Extension Director
- Other county staff members
- [Extension Organizational Development \(EOD\)](#)
- [Extension Departments and Partners](#)

## References

- *A People and a Spirit: A Report of the Joint USDA-NASULGC Study Committee on Cooperative Extension*. 1968. Fort Collins, Colorado: Colorado State University.
- Eddy, Edward D., Jr. 1956. **Colleges for Our Land and Time-The Land Grant Idea in American Education**. New York: Harper Brothers. See pp. 257-259.  
<http://www.nap.edu/books/0309052955/html/>
- *Extension Is Not Just Service*, Emmalou Van Tilburg Norland; Associate Professor, Department of Agricultural Education, Ohio State University-Columbus.  
<http://www.joe.org/joe/1990winter/tp1.html>.
- Rasmussen, Wayne D. 1989. *Taking the University to the People: 75 Years of Cooperative Extension*. Ames: Iowa State University Press.
- Sanders, H. C., ed. 1966. **The Cooperative Extension Service**. Englewood Cliffs, N.J.: Prentice-Hall. See pp. 3-47.
- Sanderson, David. 1988. *Working with Our Publics: Module 1—Understanding Cooperative Extension*. Raleigh: North Carolina Cooperative Extension Service. (This training module may be obtained on loan from the Cooperative Film Library, Cooperative Extension Service, N.C. State University, Raleigh.)
- Schaub, I. O. 1953. *Agricultural Extension Work: A Brief History*. Circular No. 377. Raleigh, N.C.: North Carolina Cooperative Extension Service.

## OBJECTIVE 3

### *Learn About Your Area of Responsibility, Associated People, and Helpful Resources*

(This objective provides useful information for programming efforts).

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#### **Key Points for Discussion and Study**

- County Population and related Demographics
- Major Employment and Sources of Income in the County
- Public and Private Resources available to the Public

#### **Sources of Help**

- [County Extension Centers](#)
  - Locate County Extension Directors in NC Counties
  - Locate Agents in NC Counties
  - Extension Demographic Data (in County Office)
- Directories
  - [Extension Directory](#)
  - [NC State University Directory](#)
  - [NC A&T State University Directory](#)
- Maps
  - [Extension District Map](#)
  - [Area Specialized Agents – County Coverage Areas](#)
- Public Library
- [North Carolina State Data Center](#)
- [NC State Extension Departments and Partners](#)
- [NC Department of Agriculture and Consumer Services](#)

#### **Assignments**

- Collect the necessary information and fill in the county information.
- Take a county/regional tour(s) with your direct supervisor.
- Identify programmatic resources in your office (files, publications, manuals, books, etc.).

<b><u>County Background Information</u></b>	It is necessary for you to have knowledge of the population, geography, and economic situation in the county or region in which you are placed. This is commonly referred to as background information. Information on available communication media is also needed. Complete this section by filling in the information for your county or region.
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### **Suggested References**

- [Current U.S. Bureau Census Data](#)
- [Agricultural Census Data](#) (USDA in partnership with NCDA&CS)
- [NC Office of State Budget and Management](#)
- Office File on Background Information
- County Plan of Work - County Strategic Plan

### **People Who Can Help You**

- Other Extension Personnel
- Farm Services Office Manager (or Director)
- County School Superintendent
- City School Superintendent
- Manager of Local Chamber of Commerce
- Extension Advisory Councils and Program Committees
- Key Leaders within the Community

**Population Information**

**5 Years Ago**

**Present**

Number of towns	_____	_____
Number of farms	_____	_____
Number of farm owners	_____	_____
Number of farmers working away from home	_____	_____
Average size of farm	_____	_____
Total population	_____	_____
White	_____	_____
Black	_____	_____
Hispanic	_____	_____
Other (e.g., Native American)	_____	_____
Farm population	_____	_____
Number of farm families	_____	_____
Rural non-farm population	_____	_____
Percent of population over 65 years of age	_____	_____
Percent of population under 18 years of age	_____	_____
Number of boys and girls age 5-19 years	_____	_____
Number of preschool boys and girls	_____	_____

**Geographic Information**

**Present**

Land area of county (square miles)	_____
Acres in:	_____
Forests	_____
Pasture or improved range, native	_____
Cultivation	_____
Topography	_____
Elevation	_____
Average annual rainfall	_____
Last frost date (spring)	_____
First frost date (fall)	_____
Length of growing season	_____
Major roads	_____

**Economic Information**

Annual total gross income in county from all \_\_\_\_\_ \$ \_\_\_\_\_

Amount and percent of county annual income from:

	Amount	Percent
Business	\$ _____	_____
Industry	_____	_____
Recreation/tourism	_____	_____
Government (except military)	_____	_____
Military	_____	_____

Agriculture (List major commodities in the county):

Name of Commodity	Amount	Percent
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Economic trends in counties or regions \_\_\_\_\_  
\_\_\_\_\_

Others (List): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

As it relates to your job responsibilities, list organizations and/or businesses that have similar products and services:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Health and Other Social Issues** (Example: list the top three health issues in your county/region.) This website, [NC State Center for Health Statistics](#), has a multitude of information you may want to explore.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Environmental Issues** (List the top three environmental issues in your county/region.)

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**General Information**

Number of households \_\_\_\_\_  
Trend (increase or decrease) \_\_\_\_\_

Persons per household \_\_\_\_\_  
Trend (increase or decrease) \_\_\_\_\_

Educational level (median school years completed) \_\_\_\_\_  
Median family income level \_\_\_\_\_  
Number of single parent households \_\_\_\_\_  
Infant mortality rate \_\_\_\_\_  
Number of families with children under 6 years of age \_\_\_\_\_  
Number of families with children under 18 years of age \_\_\_\_\_  
School dropout rate \_\_\_\_\_  
Unemployment rate \_\_\_\_\_  
List 5 additional sources of data relevant to your program: \_\_\_\_\_

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4-H Clubs

Community \_\_\_\_\_  
Project \_\_\_\_\_  
School \_\_\_\_\_  
Community partnerships \_\_\_\_\_  
Special interest projects \_\_\_\_\_  
Curriculum enrichment \_\_\_\_\_  
Number of Extension and Community Association (ECA) Clubs \_\_\_\_\_  
ECA members' numbers \_\_\_\_\_

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**Write a paragraph about the history and development of the county or region.**







## OBJECTIVE 4

### *Gain an Understanding of Your Own Position, Responsibilities, and Relationships with Others in the Extension Organization*

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#### Key Points for Discussion and Study

- Job Descriptions of Agents, County Directors, Specialists, Regional Coordinators, and District Directors
- Your Responsibilities and How Your Performance Will Be Evaluated
- How Other Agents with Similar Responsibilities Conduct Successful Extension Programs
- NC State Specialists and NC A&T Specialists- learn which specialists to contact and How They Can Help

#### Assignments

- Using the current North Carolina Cooperative Extension organizational chart at [NC State University](#) and NC A&T University as a reference, discuss with the county director the state, district, and county organizational structures. In addition, review with your supervisor the county government's organizational chart.
- Visit with each county staff member and record his or her responsibilities.
- Set up your [NC State Directory](#) page and [Extension Directory](#) page; and [Area of Responsibility page](#).
- In your county's "plan," study the programs planned in the subject areas for which you are responsible. Also review the county's strategic plan and the North Carolina Progress Board's report.
- Review the performance review process with your CED. (Both [annual](#) and [mid-year evaluations](#).)
- Review methods to document program impacts with your CED.
- Review with your CED the names of specialists with whom you will likely be involved in your assignment; make contacts. Visit with a specialist in your program area.
- With the advice of your CED, plan a visit with an agent in another location who is responsible for the same (or similar) subject area as you. Plan the visit in a way that will allow you to observe techniques and processes used by an experienced agent.

- Familiarize yourself with the national, state, and county up-coming calendar of events that may pertain to you.

### ***Visiting an Agent***

When you visit an experienced agent who has the same area of responsibility, discuss the following:

- Job expectations for a new agent
- Farm, home, and business visits: the purpose, techniques, skills, approaches, and closures
- Handling of phone calls; use of basic support publications
- Daily planning, organization of work, division of responsibilities, time management, office conferences, results, and reporting
- Delivery techniques: how the agent “sells” his or her ideas; use of teaching resources such as visuals and publications
- Relations with local media
- Teamwork—getting along with coworkers
- Subject-matter emphasis and other programming emphasis
- Unique programming opportunities for groups such as people with handicaps, the elderly, youth, migrants, military personnel, and others
- Balancing job and family; professional scheduling
- Appropriate dress for the job

During the visit, try to observe how the agent:

- Conducts a major Extension function, such as a meeting, field day, or workshop; observe volunteer involvement
- Handles program development and engages people actively in roles such as advisory committees and environmental scans

### ***Visit Specialist(s) at NC State and NC A&T in Your Program Area***

Schedule time during the year to visit with specialists in your program area. You can have them come and see you, involve them in a program, or visit them on campus.

## OBJECTIVE 5

### *Become Knowledgeable about Affirmative Action Legislation and Requirements of Your State's Extension Service*

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#### **Key Points for Discussion and Study**

- Civil Rights Legislation
- Grievance Procedures
- Affirmative Action Procedures Relating to Your Job
- Documenting Affirmative Action
- Program and Audience Diversity
- Understanding the Laws as It Relates to Supervising Agents

#### **Assignments**

- Review the relevant policies and discuss with your direct supervisor.
- Become familiar with county Extension affirmative action files.
- Become familiar with diversity initiatives including trainings being offered

#### **Sources of Help**

- County and District Directors
- Other Staff Members
- State Extension Affirmative Action Officer/Personnel Director
- State Extension Grievance Coordinator
- County Government Affirmative Action Officer
- [NC State University Diversity Equity and Inclusion Resources](#)

## OBJECTIVE 6

### *Develop an Educational Program Based on Clientele Needs*

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#### **Key Points for Discussion and Study**

- Programming in Extension
- Program Process in Extension: Planning, Designing, Implementing, Evaluating, and Reporting on Programs
- Linking Cooperative Extension to Its Publics through Need Analysis and Leader Involvement
- Individual Onboarding Program: these concepts will be used by the Extension Professional as they learn more about programming during their first year of onboarding to the organization.

#### **Assignments**

- Review the county plan of work, individual plans of action, success stories, and county impact reports. Determine the components of the county plan of work that you can implement, taking into account your own competencies, time, resources, and clientele needs.
- Identify an area with input of your program advisory committee in which some relevant educational activities could be presented to help you gain visibility and achieve early success in your Extension work. This effort should take into account your subject matter strengths, the availability of program assistance from specialists, the time and resources needed, and the likelihood of audience acceptance.
- With input from your County and District Extension Director, set a date for completing a realistic plan of action for the remainder of the current year. Use a plan-of-action form to write each program focus. Discuss your plan of action with your CED. Write educational objectives. Plan and conduct a minimum of one educational experience selected from the current plan of work for which you have responsibility.
- Review with your CED, the purpose of program development and evaluation studies, reports to the people, and other opportunities to communicate your program impacts.
- Discuss with other agents their techniques for marketing Extension programs and their definition of an activity versus a program.
- Within 6 months, discuss with your CED if you have not had formal training on programming.

## References and Sources of Help

### Sources of Help

- [Dr. Jay Jayaratne, Program Evaluation Leader](#)
- [Extension Evaluation Resources](#)
- [Academic Credit Courses Available in Programming](#)
  - AEE 521 Program Planning in Agricultural and Extension Education
  - AEE 523 Adult Education in Agriculture
  - AEE 577 Evaluation in Agricultural and Extension Education
- [Extension Programming Models](#) – Dr. Joseph Donaldson
- [Effective Community Engagement: A Guidebook for Extension Professionals](#)

### References

- [Journal of Extension](#)
- Journal of Extension Systems (International)
- [Journal of Human Sciences and Extension](#)
- [Journal of International Agricultural and Extension Education](#)
- Birkenholz, R. J. (1999). *Effective adult learning*. Danville, IL: Interstate Publishers, Inc.
- Boone, E.J., Safrit, R.D., & Jones, J. (2002). *Developing programs in adult education* (2nd ed.). Prospect Heights, IL: Waveland Press, Inc.
- Boyle, P.G. (1981). *Planning better programs*. New York: McGraw-Hill Book Company.
- Caffarella, R.S., & Ratliff Daffron, S. (2013). *Planning programs for adult learners* (3rd ed.). San Francisco: Jossey-Bass Publishers.
- Seevers, B., & Graham, D. (2012). *Education through cooperative extension* (3<sup>rd</sup> ed.). Fayetteville: University of Arkansas. ISBN: 1-56502-107-X

## OBJECTIVE 7

### *Learn the Role of Advisory Committees and Volunteers, How to Facilitate Productive Meetings, and Recruit Effective Members*

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#### **Key Points for Discussion and Study**

- [Information about the State Advisory Leadership System](#)
- Importance of Advisory Committees and How They Contribute to Programs by:
  1. Helping Extension Agent Make Program Decisions
  2. Providing Support for Programs
  3. Legitimizing Programs
  4. Providing Opportunities to Develop Leadership
- Roles of Advisory Committee in:
  1. Reviewing Local Situational Data
  2. Identifying Clientele Needs
  3. Establishing Priorities
  4. Exploring Methods for Delivering Programs
  5. Facilitating Program Implementation
  6. Evaluating Accomplishments
- Interactions with Advisory System:
  1. Orienting and Informing Members
  2. Preparing for Meetings
  3. Preparing Materials for Member Review
  4. Establishing Format for Meetings
  5. Developing Group Process Skills
  6. Frequency of Meetings
  7. Opportunities to serve in leadership roles



- Role of Volunteer Leaders in Extension Programs:
  1. Advisory Committees
  2. Organized Extension and Community Associations and Extension Master Gardeners Associations
  3. 4-H Youth Development and Community Resource Development (CRD) Leaders
  4. Commodity, Agricultural Associations, Agribusiness Groups, & Farm Cooperators

## Assignments

To gain familiarity with the advisory leadership system, carry out the following tasks:

- Review a list of the leaders in your county's advisory system.
- Visit the members of your specialized committees and any organizational leaders in groups you are responsible for working with, such as Extension and community associations, 4-H, FCS, and NC Agricultural commodity groups.
- Start a dialogue with your direct supervisor if there is a need to revisit the current advisory members that relate to your program area. Keep in mind diversity; and whether the current membership can help you reach the audiences you need to reach.
- Identify committees and groups that are involved in Extension planning, delivery, and evaluation system (such as area development associations, 4-H councils, Extension and community associations, commodity groups, and others) and (analyze the purpose of each).
- Visit and identify volunteers involved with the groups pertinent to your subject areas.
- Have a discussion with your supervisor about engaging and managing volunteers.

## Sources of Help

- Onboarding Training During Year 1,2, & 3
- District and County Extension Directors
- Regional Coordinators
- Extension Organizational Development (EOD)
- Volunteer System Leader Learning Partners
- [Advisory Leadership System website resources for CEDs and agents](#) (link requires sign in with Unity ID)

## References

[Advisory Councils - Real Friends](#)

[Interesting Study of Advisory Councils](#)

## OBJECTIVE 8

### *Learn How to Manage the Extension Reporting System, Write Effective Impact Statements and Success Stories to Market You and Your Programs*

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#### Key Points for Discussion and Study

- The Importance of Measuring the Impacts of Your Programs
- How to Write Effective Impact Statement
- Marketing You and Your Program Effectively
- Important Reports, Reporting and the Timeliness of Them

#### Assignments

- Explore the ERS system on the web and look over the impact statements in: [Extension Reporting System](#) (ERS)
- Which ones did you think are good? Why?
- Have a conversation with your advisory chairperson and ask them what would be some significant program impacts in your subject matter area.
- Develop three programming scenarios and practice writing impact statements for each.
- Discuss with your direct supervisor how you can brand yourself in your area and best market your programs.
- Discuss with your direct supervisor the Branding and Marketing Initiative
- Locate and practice using the NC Cooperative Extension logo properly

#### Sources of Help

- [NC Cooperative Extension Brand website](#)
- *Journal of Extension* Article Archives:  
[Evaluating Extension Program Effectiveness: Food Safety Education in Texas](#)

*Writing Success Stories for Program Enhancement and Accountability*

*Program Development In A Political World—It's All About Impact!*

*Developing a Simple Four-Step Marketing Plan for Extension Programs*

*What's Relationship Marketing?*

*Marketing Planning For Extension*

*Extension's Public Perception*

*Knowing Our Customers*

*Is Extension an Idea Whose Time Has Come--and Gone?*

## OBJECTIVE 9

### *Gain an Understanding of Opportunities for Professional Improvement; the XLMS System, and Trainings to Complete in Year 1*

---

#### **Key Points for Discussion and Study**

- Importance of In-Service Training
  1. Purpose, Opportunity, Value to Program
- Importance of attending all required trainings during Year 1, Year 2, and Year 3.
- Professional Organizations and Meetings
  1. Extension Staff Meetings—County, District, and State
  2. [Professional Organizations for Extension Professionals](#)
- Professional Journals and Awards
  1. [Journal of Extension](#)
  2. [Family and Consumer Sciences](#), [4-H Youth Development](#), and Agricultural Journals (of which there are many)
  3. [Professional Recognitions and Awards](#)
- Opportunities for Professional Improvement
  1. Formal Study – Obtaining Advanced Degree/Graduate-Level Credit Courses
  2. Informal Study - Seminars, Short Courses
  3. Self-Directed Learning
  4. Satellite Conferences
  5. Electronic Courses
  6. In-Service Courses
  7. Extension State Conference or District Conferences
- Job Expectations
  1. Balancing Job and Family
  2. Teamwork—Getting Along with Coworkers
  3. Appropriate Dress
  4. Speech and Written Communications

## OBJECTIVE 10

### *Develop a Learning Network and Identify Your Learning Partners; and Develop a Learning Development Plan (LDP).*

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The Learning Network process supports three of the Onboarding System's principles:

- Individuals are responsible for their own growth and development in a learner-focused system.
- Learning is a monitored, continuous and interactive process.
- Learning is a dynamic flexible system that adjusts and renews itself in response to internal and external forces.

The three goals of this chapter are:

- Provide Perspective – on Learning Networks and its value to Extension
- Provide Guidelines – for you, your CED and your learning partners
- Outline Process – of selecting, interacting and evaluating the Network and Plan

Definition: Learning Partners are various individuals, some from within the organization but occasionally from outside the organization, that have certain expertise, experience, or skills relative to the needs of new workers; and these individuals agree to assist the new worker by appropriately sharing this expertise, experience, and/or skills.

#### **Key Points for Discussion and Study**

- How can a Learning Network accelerate my progress and success?
- Who are the critical people (learning partners) I need in my personal learning network?
- What are the key expectations I have of each of my learning partners?
- How do I write and clarify my expectations and agreement with my learning partners?
- What role do my CED and DED and/or Regional Coordinator play in my selection of my learning partners and development of my learning plan? What role do Specialists, Associates, and Technicians play in my role?
- What is my accountability in the LN/LDP process?

## Sources of Help

- Colleagues in your counties
- Colleagues in your district
- County Extension Director
- District Extension Director (NC State Cooperative Extension Service)
- Regional Coordinators (NC A&T Cooperative Extension Program)
- Specialists, Extension Associates, and Technicians
- Reading Guidelines for Developing a Learning Network
- Reading Guidelines for Developing a Learning Development Plan

## Assignments

- With the guidance of my supervisor, select an appropriate network of Learning Partners. Identify learning expectations of each partner.
- Develop my Learning Development Plan
- Quarterly report and discuss results of my learning development plan with my supervisor.

# North Carolina Cooperative Extension Guidelines for New Agents Developing a Learning Network and Learning Development Plan

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## Purpose and Philosophy

NCCE, as a learning organization, takes seriously its responsibility to assist new professionals as they assume their roles whether in the county or on campus. Changing demographics and a shifting economy are two key drivers of the current need for rapid changes in the NCCE organization. Change makes the world complex and requires that all employees be life-long learners. The person or organization that does not continue to learn becomes obsolete. For this reason, we support a process for creating a Learning Network.

NCCE wants new employees to be successful. Professional development is a proven way to provide in-service training that helps employees to succeed. Developing a Learning Network is *one of several strategies* in the Onboarding Program that promotes professional development.

The development of a Learning Network and Learning Development Plan is not designed to replace or change any existing programs, but is an inclusive process to pull together and recognize as a system all efforts of the organization that focus on supporting new employees to accelerate their learning and success.

## Suggested Critical People to Include in Your Learning Network

- Seasoned Agent(s) with similar subject-matter responsibility(ies)
  - Key expectations:
    - Assist new colleagues in understanding the process of developing relevant educational programs related to subject-matter responsibilities.
    - Assist new colleagues in understanding the aspects of planning, conducting, and evaluating specific events and activities.
    - Assist new colleagues in identifying and using resources that will strengthen their educational programs.
    - Advise new colleagues in strategies to gather impact data and report successes.
    - Share with new colleagues the value of properly networking with media, volunteers, specialists, and other key resource people.
    - Share with new colleagues appropriate strategies for securing outside funding to enhance the effectiveness of planned program(s).
    - Be a frequent sounding board.

- County Extension Director (CED) and/or an Extension Office Partner
  - Key expectations:
    - Assist new colleagues in developing a strong relationship with other Extension employees and community leaders within the county or area.
    - Advise as to events and activities that would support their personal and professional development.
    - Counsel with new professionals as needed to identify those areas where additional training may be needed.
    - Counsel with new professionals as needed to help develop a relevant plan for professional development.
    - Support new colleagues as they work through the steps in the onboarding manual.
    - Be a frequent sounding board.
  
- NC State District Extension Directors (DED) and NC A&T Regional Coordinators (RC)
  - Key expectations:
    - Assist new colleagues in developing a strong relationship with other Extension employees and community leaders within the district and the state.
    - Advise as to events and activities that would support their personal and professional development.
    - Reinforce to new colleagues the extent of the CES system and resources available for onboarding, professional development, and program development and delivery.
    - Support new colleagues as they work through the steps in the onboarding manual.
    - Be a frequent sounding board.
  
- State Extension Specialist(s), Extension Associates, and Technicians
  - Key expectations:
    - Assist new agents in developing a strong relationship with their academic support base and assist with subject matter and/or professional technical issues.
    - Schedule appropriate activities to introduce new agents to campus-based colleagues/resources during the initial visit to campus and periodically as possible.
    - Establish personal relationships to help new agents feel comfortable and be willing to communicate openly.
    - Provide assistance with promotional materials, mass media work, etc., as needed.
    - Support new agents as they progress through the onboarding manual.
  
- Program Leaders
  - Key expectations:
    - Assist new agents in developing a strong relationship with the academic support base within their program areas.
    - Support new agents as necessary in developing a relevant county/area program that will properly address a long-range focus area.



- Assist new agents when appropriate in identifying and working with other agents or key leaders across the state that may be addressing similar area, regional, or state issues or needs.
- Extension Organizational Development (EOD)
  - Key expectations:
    - Assist new agents in understanding the resources that are available to support his/her professional and personal development.
    - Assist new agents in understanding the resources available to enhance both the onboarding process and life-long learning.
    - Develop and deliver training programs that support the professional and personal development
    - Develop and deliver training programs that support the onboarding process and life-long learning.
    - Be a frequent sounding board.
- Local Government Official(s)
  - Key expectations:
    - Assist new agents in understanding the needs and issues faced by that segment of local government.
    - Advise new agents of operation and makeup of local government within the county.
    - Provide opportunity for new agents to develop relationships with local funding sources.
    - Provide opportunity for new agents to create increased awareness of Extension programs and/or services that can be provided to support local governments.
- Advisory Member(s)
  - Key expectations:
    - Assist new agents in understanding the needs and issues faced by clients in the county or area.
    - Advise new agents of, and introduce to, other key county leaders that have strong interest in the success of relevant Extension educational programs in the county or area.
    - Provide new agents with background of prior Extension educational programming within the subject-matter area.
    - Provide new agents with needed history of the communities in which he/she will work and the perceptions of those living within those communities.
    - Assist new agents in establishing relationships with key businesses and agencies within the county/area that can provide technical or financial assistance for Extension programming.

## Characteristics of Effective Learning Partners

- They:
  - Are knowledgeable of their respective fields.
  - Are considered by peers as having broad-based programs and/or expertise.
  - Set high standards for themselves.
  - Model professional development as they “continue to update themselves through self-study and professional development opportunities.”
  - Work demonstrates superior achievement.
  - Use a variety of techniques to achieve their goals.
  - Exercise good judgment.
  - Listen and communicate effectively.
  - Are sensitive to the needs of others, recognizing when others are in need of support.
  - Exhibit a strong work ethic.
  - Recognize excellence and encourage it.
  - Have knowledge of the organization.
  - Display the ability to motivate others.
  - Show a willingness to personally help others.

# Learning Development Plan

*The most important key to your successful growth is your own sense of personal responsibility for development. Lifelong learning is...a necessity.*

## Key Steps in Development

- Take time to find out who you are and what you want.
- Yourself: Career interests, strengths/needs, core motivations.
- Job: Priorities and Expectations
- Get feedback from your supervisor/others.
- Have a developmental discussion with your supervisor.
- Understanding job expectations, performance, skills, and future development.
- Get additional input from others (mentor, peer network).
- Build a strong network.
- Participate in the learning network
- Explore others' roles.
- Support others' development and performance.
- Prove your value.
- Look for skill/experience bridges into other functional areas.

## Take Stock of Your Skills and Job

- What significant learning experiences or challenges have you had in your life and your work?
- What lessons did you learn?
- Have you applied those lessons anywhere?
- List as many as five strengths that you believe have led to your successes thus far.
- Which do you think are your two or three most significant undeveloped areas or weaknesses?
- Recognize how your current job is developmental.
- What's the technology challenge? The critical technical skills? Critical managerial/interpersonal skills? What's the people challenge? To what degree have you mastered the challenges?
- Understand expectations and added value in your current job.
- What are the top priorities?
- What do you need to accomplish this year? By the time you leave the job?
- How could you add value beyond expectations?

## Summarize Yourself

- "What **three adjectives** might significant coworkers/boss/others use to describe me?"
- "What three adjectives would I use to describe myself?"
- "Are there differences between my description and that of others?"
- Include three or four CLEAR strengths where you can back it up in your accomplishments.

## **Involve Your Supervisor and Others**

- Your first line of career support is your supervisor.
- Ask to meet with him/her to discuss your development more thoroughly.
- Prepare for the development meeting.
- Prepare your discussion based on how you think s/he might best listen to you.
- Send him/her a copy of the development dialogue questions (next page).
- Practice the skill of receiving feedback.
- Be aware that self is the poorest judge—your viewpoint has blind spots.
- Keep an open mind and listen carefully.
- Be open enough that you make it easy for the supervisor to provide honest feedback.
- Plan open and thoughtful responses.
- “I hadn’t seen it that way ... can you give me more information?”
- “I’m surprised to hear that ... but I’ll (name some learning action).”
- Reflect on feedback to determine reality from others’ perceptions.

## **Have a Development Dialogue**

The “developmental dialogue” provides a framework for a more comprehensive discussion around your development. It is best done when you and your supervisor both have had a chance to review the questions in advance. (Please adapt as appropriate.)

### **Part A: Current Job**

- What do you see as the top priorities on the job?
- What do you see as my key accomplishments in this job?
- Are there way(s) in which I added *value* to the job—beyond meeting objectives?
- What do you think has been my most significant learnings from this job?
- What are some of the things you feel I need more experience, coaching, or training to execute more effectively?
- What else would you like me to learn in this job?

### **Part B: Skill Portfolio**

- What three adjectives would you use to describe me?
- What do you see as my top skill strengths? Skills that need further development?

### **Part C: Talent Assessment**

- Can you tell me how I was assessed in terms of my potential from the talent management process?
- (If applicable): What development options exist for me?
- (If applicable): Are there any tips you can give to help me for future assessments?

### **Part D: Development for the Future**

- Given my interests and current functional knowledge, what kind of work do you think I should do two to three years from now? What should be my next move?
- What do you think are my competitive advantages and disadvantages when being considered for promotional opportunities?

- Given my future interest and the current job, what development goal(s) do you think I should focus on during the next year?

*Note: You may want to have a developmental dialogue with others in your network—a former supervisor, a mentor, a peer. Compress the time by selecting the most significant questions.*

### **Additional Tips for Development**

- Go for projects/tasks where you can do some things for the *first* time, or very differently.
- Start small; successful people often started with smaller versions of the significant change they made later.
- Become an effective communicator.
- Become an effective questioner.
- Become a constructive influencer—recognize cynicism’s poison.
- Foster a reputation of getting things done with a positive impact on others.
- Offer your strengths to help others.
- Enable people to get to know you and your work habits.
- Reflect on your successes and shortcomings—and get feedback.
- What worked? What didn’t? Why? How could you do it differently?

## Learning Development Plan: A Sample

<b>Learning Contract For:</b> John Doe		<b>Date:</b> 1-5-23	
<b>Learning Objectives</b>	<b>Learning Resources &amp; Strategies</b>	<b>Evidence of Accomplishment of Objectives</b>	<b>Criteria and Means of Validating Evidence</b>
To gain an understanding of the steps in Programming that will help me develop a program plan for presentation by December 31.	To read the book, Program Planning for Adult Learners: A Practical Guide 3 <sup>rd</sup> Edition. (R.S. Caffarella and S.R. Daffron)	Developing confidence in creating a program plan and is developing his first draft of a program plan for use within his county.	Has had discussions with colleagues in the county and direct supervisor about ideas and steps for his program plan.
To gain an understanding of my personal behavior and personality that may help me improve my ability to work with others by December 31.	Read the book, <i>Emotional Intelligence in the Work Place</i> , by Goldman.	Ability to work more effectively with others has increased; more successful and productive meetings, and projects steps are being completed.	Other colleagues are commending John on his work and leadership style.

## OBJECTIVE 11

### *Present to Your County Colleagues a One Hour Oral Presentation*

This is to be organized by the new professional and their supervisor within one year of starting date. This is to be a safe event that celebrates the achievements of the new employee.

#### **One-Hour Session to the County Staff – Template**

- Sharing Your Philosophy of Education
- Advisory/Volunteer Development Summary
- One Program Initiative:
  - Needs Assessment
  - Design and Implementation
  - Evaluation
- Questions

Acknowledgement of Completion

# APPENDIX A

## Check Sheets for County Extension Directors (or others as assigned)

A checklist for supervisors was initially part of the first Field Agent Guide. This checklist is intended to be used as a guide for the CED (or his/her assigned) in working with new Extension professionals. The intent is to encourage direct conversation and face to face meetings between the CED and the new professional, though other county professionals including campus personnel could be designated to assist in the onboarding process.

### **Objective 1** **Acquire an Understanding of Office Procedures, NC State and County Policies and Procedures**

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#### **Office Tour**

1. Complete Office Tour Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Office Memos**

1. Inclement Weather Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Holidays Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Sunshine Committee Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Ordering Supplies via County Budget Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Review Community Standards Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Telephone**

1. Telephone Use Instructions & Voice Mail Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Credit Card (If Applicable) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. How Calls/Visitors Are Processed Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Participate in an Office Visit Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Individual Office Extensions & Responsibilities Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Staff Personal Phone #s for Emergency Initial: \_\_\_\_\_ Date: \_\_\_\_\_



## **Scheduling**

1. Office & Work Hours Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Check in/out procedures Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Create calendar system (online or planner) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Professional scheduling Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Requesting leave Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Vehicle Usage, Room, Equipment Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Monthly Reports & Meetings**

1. Travel Allotment & How to Submit Travel Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Overview of ERS (See Obj. 8 for More Detail) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Extension Rosters Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Understand Staff Conference Schedule Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Discuss Miscellaneous County Reports Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Computers & Internet**

1. Meet with Systems Administrator Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Go Over Basic Internet Usage Guidelines Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Tour ERS Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Tour Extension's Intranet Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Tour One Stop Shop Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Tour MyPack Portal (Including Leave) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
7. Send a Test E-Mail with Signature Block Initial: \_\_\_\_\_ Date: \_\_\_\_\_
8. Subscribe to Announce, Admin, & Tech Talk E-mail Initial: \_\_\_\_\_ Date: \_\_\_\_\_
9. Review County Webpage and Responsibilities Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Mailing Lists**

1. Go Over How to Use and Edit 'Contacts' Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Organize E-Mail Folders Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Create Basic E-Mail Mailing Lists Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Go Over Marketing Guidelines Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Obtain Past Mailings from Other Agents Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Publications**

1. Familiarize Yourself With Publication Display/Storage Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Access Publications Online Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Meet With Support Staff Publication Replenishment Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Refresh Lobby Bulletin Racks Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Review Fee Based Publications (Ex. Chemicals Manual) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Study Affirmative Action & Civil Rights Materials Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Money Handling**

1. Go Over Money Handling Procedures Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Discuss Budgeting Issues Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Understand Reimbursement Procedures Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Liability**

1. Discuss Insurance (When, How, & Why) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Understand Usage of Photo Waivers Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Discuss Code of Conduct Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Go Over County Specific Liability Issues Initial: \_\_\_\_\_ Date: \_\_\_\_\_

**Vehicle Usage**

- 1. Procedure for Reserving & Documenting Use
- 2. Process for Acquiring Gas
- 3. Driver Safety Training

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 2

### *Develop Knowledge of Extension and Its Philosophy, Mission, and Functions*

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#### **Extension's Framework**

1. Vision, Mission, Initiatives, and Philosophy Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Legal Framework (Smith-Lever Act) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Land-Grant Universities (1862, 1890, and 1994) Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **North Carolina Cooperative Extension**

1. Organization and Personnel (CALs, NC State, & NCA&T) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. County Commissioners Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Extension and Engagement Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Area Organizations & Key Leaders**

1. Local Extension Agent and Secretaries Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Advisory Leadership/ Strategic Planning Council Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. County Administration Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. State and Federal Government Officials Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Soil and Water Conservation District Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Area Schools Initial: \_\_\_\_\_ Date: \_\_\_\_\_
7. Agricultural Leadership Initial: \_\_\_\_\_ Date: \_\_\_\_\_
8. Youth and Families Leadership Initial: \_\_\_\_\_ Date: \_\_\_\_\_
9. Local Community Leadership Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 3

### *Learn About Your Area of Responsibilities, Its People, and Its Resources*

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#### County Stats

1. County Population and Demographics Complete Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. History of County Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Communities/Townships/Voting Districts Identified Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. County Road Trip Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Marketing

1. Radio Stations Identified/Contacted Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Observe and Complete Radio Presentation Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Newspaper(s) Identified/Contacted Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Releases or Articles in Newspaper Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. TV Stations Identified/Contacted Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. County Web Site Reviewed Initial: \_\_\_\_\_ Date: \_\_\_\_\_
7. Web Postings Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Programmatic Resources

1. Location of Audio Visual Equipment Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Instruction AV Equipment Usage/Reservation Process Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Location of Publications (Office and Web) Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 4

### *Gain an Understanding of your Own Position, Responsibilities, and Relationships with Others in the Extension Organization*

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#### Job Descriptions

1. Discuss Job Descriptions of Agents, County Directors, Specialists, Regional Coordinators (NCA&T), and District Directors Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Responsibilities

1. Discuss Agent and CED Responsibilities Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Discuss Performance and Evaluation Procedures Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Visit with County Staff & Record Responsibilities Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Set up directory pages with NC State, NC State Extension and/or NC A&T including Area of Responsibility Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Creating Successful Extension Programs

1. Connect Your Program Area to County Plan of Work Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Meet with Successful Agents with Similar Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Attend Activities of Successful Programs Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Meet with Specialist(s) and Review Specialist Role in Extension Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 5

### ***Become Knowledgeable about Affirmative Action Legislation and Requirements of Cooperative Extension***

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#### **Civil Rights**

1. Locate and Review Affirmative Action Files in Office Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Review the online Administration Handbook Chapters Related to Affirmative Action & Civil Rights Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Review Civil Rights Sections of ERS Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Understand Necessity of Record Keeping Documents for Contacts (i.e. Phone Logs, Visitor Logs, and Program Sign-in Sheets) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Review the online Grievance Procedures Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Review Required Statements for Documents Generated Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Diversity**

1. Identify Statewide Diversity Initiatives Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Identify County and District Diversity Initiatives Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Review the County Diversity Plan Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 6

### Develop an Educational Program Based on Clientele Needs

#### Programming

1. Discuss Components of County Plan of Work Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Discuss Components of Individual Plan of Action Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Set Date to Complete an Individual POA Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Review & Discuss Success Stories Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Review & Discuss Accomplishment Reports Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Understand the Programming Process (Planning, Implementation, & Evaluation) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
7. Identify Programs Relevant to Subject Area Initial: \_\_\_\_\_ Date: \_\_\_\_\_
8. Plan & Conduct a Program (CED Mentor) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
9. Discuss Programming Options\* Initial: \_\_\_\_\_ Date: \_\_\_\_\_  
\*(New Professionals Training or Online Graduate course with Ag Extension Education)
10. Discuss "Report to Key Leaders" Initial: \_\_\_\_\_ Date: \_\_\_\_\_
11. Sponsorships for Programming & Fiscal Mgt Use Initial: \_\_\_\_\_ Date: \_\_\_\_\_



# Check Sheet

## Objective 7

### *Learn the Role of Advisory Committee and Volunteers, How to Facilitate Productive Meetings, and Recruit Effective Members*

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#### **Purpose of Advisory Leadership System (Discussion with CED)**

1. CED Expectations Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Purpose of Advisory Committees Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Structure: County, District, and State Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Structure: Program and Specialized Committees Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Resources for Training ALS Members Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Interaction with Advisory System**

1. Attend County Advisory Council Meeting Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Attend a Program Advisory Committee Meeting Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Format Program Advisory Yearly Calendar Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Recruit Members Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Onboarding of Members Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Conduct First Meeting (CED Must Attend) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
7. Meeting Documentation (Agenda, Minutes, & Roster) Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Utilizing Advisory Committees/Members**

1. Conduct Needs Assessment of Program Area Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Identifying Program Priorities Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Program Implementation Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## **Volunteer Management**

1. Evaluate Current Program ALS Membership Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Conduct One-On-One Visits with Members Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Involve ALS Members in Programs Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Support Volunteers' Community Interests Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Establish Volunteer Recognition Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Develop Rotation Plan for Membership Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 8

### *Learn How to Manage the Extension Reporting System, Write Effective Impact Statements and Success Stories to Market Yourself and Your Programs*

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#### Extension Reporting System (ERS)

1. Review One Stop Shop Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Schedule Training Through Extension Learning Management System Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Complete a Personal Development Record Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Review and Discuss Using Evaluation Tools Document Program Outcomes and Impacts Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Discuss ERS Data Entry/ERS Reports Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Marketing your Program

1. Review Success Stories/Impact Statements on web Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Identify Parts of a Well Written Impact Statement Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Write Success Stories/Impact Statements Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Evaluate Success Stories/Impact Statements Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Review NCCE Style Manual for Marketing Standards Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Develop an "Elevator Speech" & an Extension Commercial Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## Objective 9

### *Gain an Understanding of Opportunities for Professional Improvement*

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#### Professional Growth and Development Opportunities

1. Purpose, Opportunity, and Value Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. In-service Training Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Extension Learning Management System (LMS) Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Professional Organization Involvement Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Graduate Studies & Tuition Waiver Procedures Initial: \_\_\_\_\_ Date: \_\_\_\_\_
6. Collaborate/Blackboard Initial: \_\_\_\_\_ Date: \_\_\_\_\_
7. Self-Study and Professional Journals Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Job Expectations

1. Required Meetings: County, District, State Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Teamwork Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Interaction with Partners and Clientele Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Customer Service Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Awards and Recognition Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### Core Competencies

1. Knowledge of the Organization Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Technical Expertise Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Programming Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Professionalism Initial: \_\_\_\_\_ Date: \_\_\_\_\_

5. Communication

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

6. Human Relations

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

7. Leadership

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

# Check Sheet

## *Objective 10*

### *Develop a Learning Network (LN) and Learning Development Plan (LDP)*

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#### **Identify Learning Partners**

1. Agent Works with CED to Identify Potential Partners Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. CED Makes Initial Contact with CED of Partnering Agents Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Identify Program Specialists Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Agent Makes Initial Contact with Potential Partners Initial: \_\_\_\_\_ Date: \_\_\_\_\_
5. Finalize the Partners Initial: \_\_\_\_\_ Date: \_\_\_\_\_

#### **Learning Development Plan**

1. Develop Expectations for Agent Partner Initial: \_\_\_\_\_ Date: \_\_\_\_\_
2. Develop Expectations for Specialist (Ex Associate Partner). Initial: \_\_\_\_\_ Date: \_\_\_\_\_
3. Complete Learning Development Plan for Each Partner Initial: \_\_\_\_\_ Date: \_\_\_\_\_
4. Share Learning Development Plan with CED Initial: \_\_\_\_\_ Date: \_\_\_\_\_