Orientation Guide for New County Directors

Oklahoma Cooperative Extension Service
Division of Agricultural Sciences and Natural Resources
Oklahoma State University

January 2002
Orientation Guide for New County Directors
Oklahoma Cooperative Extension Service

As a newly appointed County Extension Director, it is imperative that you develop an understanding of the duties and responsibilities associated with this new and important role. This self study guide will lead you through a process to gain a working knowledge of the CED role, and it will also help you to become acquainted with county officials and decision makers important to the Extension program in your county. Secure a copy of the current County Extension Role Description from your District Director and read it carefully.

STEP 1: You were selected for the CED role by your District Director and confirmed by the Associate Director, OCES. In addition, your appointment was also confirmed with your Board of County Commissioners. The day your appointment takes effect you should complete the following actions:

A. Go to your county clerk’s office, introduce yourself (if you don’t know the county clerk), and see if the county requires additional forms to be completed with your new appointment as CED. You will probably be assigned as purchasing agent for the OSU Extension Office in your county. Your county clerk will lead you through this process and explain your responsibilities with each assignment. List below duties or responsibilities you have been assigned by the county because you are now the CED. Include a brief description for each of your new duties.

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

B. Your County Extension Office has a bank account in a local bank. As CED you will be charged with administering this account according to OCES policies and procedures. You will be the only person authorized to sign checks on this account. You need to go to the bank where this account is located and sign a signature card. Some banks require authorization before changing a signature card. If this is the case, you will need a letter from your District Director giving you the authority to sign checks on this account. Usually bank officials will know your office secretary. So have that individual accompany you and introduce you as the newly appointed CED.
STEP 2: Your County Extension Office will have funds available from (1) county appropriations, (2) your agency account, and possibly from (3) state funds through Oklahoma Cooperative Extension Service. As CED, you will be held responsible for the proper disbursement of these funds. It is critical that you gain a complete understanding of proper policies and procedures that apply to approved use of these funds. Complete the steps below and give a written explanation of terms or phrases in the appropriate spaces.

B. County Funds – Each year county officials appropriate funds to support the County Extension Office. The appropriations are completed through county commissioners and the excise board or through a county budget board. When the appropriations process is complete, the county commissioners sign a contract for services with Oklahoma Cooperative Extension Service. This contract gives OCES the legal means to provide services through county government. The level (amount) of funds provided by the county determines the number of positions you have in your County Extension Office. Locate the current county contract between your county commissioners and OCES. List the appropriations on the contract according to:

- Contractual Services ________________________________
- Personal Services ________________________________
- Fringe (optional) ________________________________
- Travel Expense ________________________________
- Maintenance & Operations ________________________
- Capital Outlay ________________________________
- Total Budget ____________________________________

Set up a conference call with your District Director. Be sure you have this document plus your current county contract and a copy of minimum funding guidelines as established by OCES in front of you when you begin this conference call. During this call, you need to develop an understanding of the various funding categories as listed on your county contract. Secure a definition for each category and list examples of expenditures that are appropriate for each category.

**Contractual Services:**
Define __________________________________________
Examples of expenditures __________________________________________
________________________________________
Personal Services:
Define _______________________________________________________________
Examples of Expenditures _____________________________________________
_____________________________________________________________________

Fringe: (May not apply to your county)
Define _______________________________________________________________
_____________________________________________________________________
Examples of Expenditures _____________________________________________
_____________________________________________________________________

Travel Expenses:
Define _______________________________________________________________
_____________________________________________________________________
Examples of Expenditures _____________________________________________
_____________________________________________________________________

Capital Outlay:
Define _______________________________________________________________
Example of Expenditures ______________________________________________
_____________________________________________________________________

Note: When discussing the Travel Expense category with your District Director, find out how travel budgets are set or determined for each staff member in your County Extension Office. Ask your District Director for current year travel appropriations for each person in your office and record below in the appropriate space. Now go to your secretary and ask her how much travel each staff member has spent and how much is left for the remainder of the year. From this information you should be able to tell if staff members are about on schedule as related to their travel funds for the year.
<table>
<thead>
<tr>
<th>Name of staff</th>
<th>Travel Budget</th>
<th>Funds Used</th>
<th>Travel Funds Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Now you know and understand the categories used in making county appropriations. You will be responsible for keeping your expenditures within these appropriated amounts. As a new CED, you need to know how much money is currently in each of these county accounts. Your secretary or the county clerk can help you determine account balances. In order to spend county appropriated funds you must follow correct and appropriate procedures according to county policies and procedures. Set up an appointment with your county clerk for the purpose of giving you instructions on how to spend funds in each of the appropriated categories. Record the necessary steps below.

__________________________________________________________________________
__________________________________________________________________________

Be sure you understand how to use account numbers, the encumbering process, approval process and warrant issued process.

How to use account numbers. ________________________________________________
__________________________________________________________________________

Describe your county funds encumbering process. _____________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Describe the approval process in county funds expenditures. _________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

How are county warrants issued and what does this mean in the process of county fund expenditures?
Occasionally, you may need to transfer funds from one account or category to another account. Ask the county clerk to explain the correct process to get this task accomplished.

Note: You need District Director approval before you make an account transfer. Record the process to transfer county funds from one account to another account in the space below.

__________________________________________________________________________

__________________________________________________________________________

C. Agency Funds: This is your checking account in a local bank. As funds come into your County Extension Office you are held responsible for following policies and procedures as established by OCES. You can get a copy or review and study these procedures by going to the website:

http://intranet.okstate.edu/Fiscal_Affairs/acctproc_h.htm.htm

As CED, you must have a complete understanding of these accounting procedures for County Offices. Your agency account will be audited by an OSU auditor on a regular basis. Study these accounting procedures and then test your knowledge and understanding by completing the following questions that relate to the accounting procedures for county agency accounts.

1. What computer software is used to record on a daily basis every transaction involving the receipt and disbursement of funds?
   Answer ________________________________________________________________

2. Only one individual is authorized to sign checks on your county agency account. Name that person.
   Answer ________________________________________________________________

3. Your county agency account will have various categories such as 4-H, soil and water, maintenance, publications, & etc. Funds in each of these categories will be either ______________________ or __________________________ accounts.

4. Define and give an example of a restricted agency fund category.
   Answer ________________________________________________________________
   _______________________________________________________________________

5. Define and give an example of an unrestricted agency fund category.
   Answer ________________________________________________________________
   ________________________________________________________________________
6. When funds come into the Extension office an official OSU __________ must be written and issued to the person remitting the funds.

7. Describe the information that must be included on the official receipt before it is given to the person remitting funds.
   Answer ________________________________________________________________
   ____________________________________________________________________

8. When funds come into the county office it is important to make timely deposits into your agency account. Describe the OCES policy on frequency of deposits.
   Answer ________________________________________________________________
   ____________________________________________________________________

9. Before signing an agency fund check, the County Director should review documentation to support the expenditure. This documentation will normally be an itemized receipt showing __________ of purchase and __________ purchased.

10. Upon receipt of the monthly bank statement, the CED is responsible for completing reconciliation between the bank statement and the__________. Completed bank reconciliation statements must be filed with the Extension Finance Office and your district office before the______________

C. State Purchasing Procedures: You need to gain an understanding of how to follow correct state purchasing procedures if you have any state funds from grants or other sources. Check with your District Director to see if you need to study state purchasing procedures.

Now you need to schedule a conference with your District Director. This conference can be by telephone or a face-to-face meeting. During this conference, you need to relate what you have completed to this point in the training guide. Go over what you have learned regarding county budgets to include your answers to questions on the agency account. Your District Director will also give you instructions on state purchasing procedures at this time if applicable to your county.

**STEP 3:** Office Management: As CED you are responsible for management within your county office. Your knowledge and your abilities to manage your staff, facilities, equipment and the public (people who call, write or come into the Extension office) will grow with time and maturity. However, there are basic management points you need to address immediately.

A. Office appearance – Is your office space neat, clean, and arranged in a logical order to give a friendly, professional, and positive experience to clientele visiting
the Extension office? Discuss with your staff and list below changes that need to be made in the appearance of your office.

_______________________________________________________________________
_______________________________________________________________________

B. How are clientele contacts processed in the Extension office?
   Telephone calls - Persons answering the telephone should identify the office by proper name, identify themselves by name, find out what the caller needs or the person to whom they wish to speak. Make the necessary transaction in a friendly, professional manner.

   Office visits by clientele - Visitors should be greeted in a friendly professional manner by the secretary. The secretary should find out what the person needs and then direct him/her to the proper educator.

   **Note:** To a great extent, the image of our organization is determined by how we process and handle people to meet their needs when they make contact with our county office. If clientele call by telephone or visit the office they should feel they have had a good, helpful, and friendly experience. If the educator is not available (out of the office or in conference), it is important to let that client know what the educator is doing and when he or she will be available. A timely call back by the educator is critical.

   In conference with your staff determine needed changes to make sure clientele have a positive, friendly, and helpful experience when calling or coming into the Extension office.

_______________________________________________________________________
_______________________________________________________________________

C. Educator accountability during office hours - As CED, you need to develop a system to account for each person in your office during office hours. When a staff member leaves the Extension office he/she should inform the CED and or secretary of (1) where he/she is going, (2) what he/she will be doing, and (3) when he/she will return. List below procedures you will follow to ensure staff accountability during office hours.

_______________________________________________________________________
_______________________________________________________________________
D. Office communications - As CED you are required to conduct a weekly office conference. (This is listed in the job description for CED, and you will be held responsible for this task during performance appraisals.) Office conference should be a planned weekly activity so that staff members know how to plan and prepare in advance of the conference. Set a regular time and day for your weekly conferences. Example – each Monday at 9:00 a.m. Suggested agenda: administrative update, summary and evaluation of last week’s educational programs, coming activities and events and tasks that need to be completed during the week, problems and opportunities for programming, discussion of how to get more minority participation in upcoming programs, compliance with due dates as requested by district and state offices.

It is extremely important to have a secretary record your office conference minutes and give each staff member a typed copy and send a copy to your District Director. Civil rights auditors always ask for copies of your office conference minutes. Minutes also serve as your written record of administrative announcements and instructions to your staff. Don’t underestimate the value of a good office conference along with written minutes as documentation!

E. Set up a conference with your District Director to discuss your plans as listed above in Step 3 - Categories A – D. Record below additional suggestions your District Director recommends under office management.

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

STEP 4: Personnel management: County Extension Directors are responsible for all administrative aspects of county program operations. Personnel management will be one of your most challenging roles with this new responsibility. You will have supervisory responsibility over county educators, support staff, and volunteer staff working within your county programs. To be an effective supervisor you must first be a good leader of Extension programs. A good leader exhibits good leadership skills and traits to his/her staff members in a consistent and professional manner. Leadership skills must be learned and developed through practical application. Take a look at the following traits of a good leader. We hope the information will help you develop your own leadership style.

A. A good leader will set the standard of job performance excellence by enhancing his/her personal job performance level. You must not ask more from a staff member than you would ask of yourself. Through example, you can inspire others to a
more effective and creative job performance.

B. A good leader is a good communicator. You must be able to communicate clearly and effectively with all members of your staff. Informal methods and times for communicating with staff members are important, but you simply must have a formal time and method for keeping staff members informed and involved with the total Extension program. A regular weekly staff conference with a planned agenda will help more than anything to keep communication lines open and functioning with each staff member. The importance you, the CED, place on a regular, planned office conference will be reflected back to you in the attitude your staff has towards office conference. Visit with your District Director and develop an agenda to be followed during your county office conferences. Record it below for future reference.

_______________________________________________________________________
_______________________________________________________________________

Remember, the importance you place on a regularly scheduled office conference will determine the success of this important activity. If you approach it in an unprofessional and carefree manner you and your staff will be disappointed in the results.

C. A good leader has an interest in his/her staff members and he/she looks for ways to assist and inspire staff members to new heights of excellence. As CED, you can show interest by visiting and participating in programs conducted by your staff. Assist in planning and conducting as requested. Include them in some of your planned programs. Recognize them when something goes well. A short note of congratulations for a job well done will really help to make a good day. A compliment with congratulations during office conference will really be appreciated, as all staff should realize their District Director receives a copy of all conference minutes.

D. A good leader demonstrates objectivity and dependability. If you need to counsel with a staff member, do so in a private location. Conduct your counseling in an objective, constructive manner. Plan your counseling session carefully. Avoid being reactive, volatile, overbearing and rude. Never try to embarrass or humiliate a member of your staff. Remember, your role is to inspire your co-workers to new heights of excellence. You can do so with objective, helpful counseling at the correct time, but you cannot succeed if you direct personal criticism at the individual.

E. A good leader keeps his/her staff informed, involved and feeling each is an integral part of the total Extension program. A good, regular office conference will keep all staff members informed and involved in all programs. County Extension Directors should plan and conduct at least one (1) program/activity per year that involves all staff members. This activity or program should focus on strength-
ening the creditability of the entire county program. County Directors should involve and keep all staff informed of budget negotiations and funds available. The CED should strive to provide the funds to meet the program needs of each staff member. Plan next year’s budget request together based upon program needs for your county.

F. A good leader addresses problems promptly. Problems with staff members do not just go away. You, the CED, must provide counseling in a timely manner or the problem will grow and fester into bigger difficulties. Contact your District Director to give you guidance.

G. A good leader must be knowledgeable of the duties and responsibilities of each person working in his/her county office. You can secure a copy of the position description for each person from your District Director or from the personnel office for DASNR. Show your personal interest by scheduling a conference with each staff member to discuss his/her job role. Send this conference schedule to your District Director. During each conference ask the following questions and record appropriate notes for future reference.

Name of staff member ______________________________________________________

Job title of staff member ______________________________________________________

What are your primary job responsibilities?
________________________________________________________________________
________________________________________________________________________

List things that are going well in your job role.
________________________________________________________________________
________________________________________________________________________

List things that are causing you problems or things that are not going well.
________________________________________________________________________
________________________________________________________________________

List things the new CED could start doing or stop doing to help make your job better. ____________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Name of staff member ______________________________________________________

Job title of staff member ______________________________________________________
What are your primary job responsibilities? __________________________________
__________________________________________________________________________
List things that are going well in your job role. _______________________________
__________________________________________________________________________
List things that are causing you problems or things that are not going well. _____
__________________________________________________________________________
List things the new CED could start doing or stop doing to help make your job better. ____________________________________________________________________
__________________________________________________________________________

Name of staff member _____________________________________________________
Job title of staff member ___________________________________________________
What are your primary job responsibilities? _________________________________
__________________________________________________________________________
List things that are going well in your job role. _______________________________
__________________________________________________________________________
List things that are causing you problems or things that are not going well. __________
__________________________________________________________________________
List things the new CED could start doing or stop doing to help make your job better. ____________________________________________________________________
__________________________________________________________________________

Name of staff member _____________________________________________________
Job title of staff member ___________________________________________________
What are your primary job responsibilities? _________________________________
__________________________________________________________________________
List things that are going well in your job role. _______________________________
__________________________________________________________________________
List things that are causing you problems or things that are not going well. _____
__________________________________________________________________________
__________________________________________________________________________

List things the new CED could start doing or stop doing to help make your job better. __________________________________________
__________________________________________________________________________
__________________________________________________________________________

Name of staff member __________________________________________
Job title of staff member _________________________________________
What are your primary job responsibilities?
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
List things that are going well in your job role. _______________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

List things that are causing you problems or things that are not going well. _____
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
List things the new CED could start doing or stop doing to help make your job better. __________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

H. Call the appropriate district program specialist to get his or her view on the primary job responsibilities for each county educator in your office. The comparison could be interesting.

Name of staff member __________________________________________
Job title _______________________________________________________

Primary responsibilities from DPS. _________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

Name of staff member _________________________________________________
Job title ____________________________________________________________
Primary responsibilities from DPS. _________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
I. It is now time to provide all of your county staff members a review of the role of County Extension Director. They need to understand your role just as you need to have an understanding of their role and responsibilities.

Schedule an office conference with your District Director and all of your staff. In this conference, your District Director should review CED responsibilities and clearly state his/her expectations of the new CED. Record your notes reflecting District Director expectations of the CED role.

STEP 5: Civil Rights Compliance: As CED, you are responsible for ensuring that all staff members in your office are in compliance with civil rights and affirmative action rules and regulations. The following are audit categories for Civil Rights Compliance Reviews that will be conducted every three to four years by your District Director.

Study the following comments and record questions you need to discuss in your next conference with your District Director.
A. Every county must have on file a copy of the original Affirmative Action Plan for that county. This plan was developed by county extension agents working in your county in 1972-73. Go to your civil rights file and locate this original plan. Read it carefully and check it to see the date of the last update by county staff. You will note that most of the requirements in this original plan are now just normal parts of our program planning and delivery methods. Caution! Don’t discard this original plan, it is old, but it is still required in our files. It should be reviewed and updated every fourth year. Note questions for your District Director below.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

B. State public notification plan – This is another very old document, written in the late 1970’s to detail methods and procedures Extension staff members would follow to ensure all eligible program recipients are informed of available programs. In addition, there should be a public notification plan in your civil rights file which outlines steps all staff members in your county will follow to make sure all citizens have open and equal access to all county Extension programs. This plan will be entitled County Public Notification Plan. Find this plan in your files. If you cannot find it, call your District Director to get instructions on how to develop this plan for your county.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

C. Each county office is required to display a number of civil rights and affirmative action posters. These posters should be displayed in a prominent location visible to people who come into the county Extension office. “Justice for All” is just one of the posters which you must have displayed. Record below the posters on display in your office and compare this list with the required list you can get from your District Director.

__________________________________________________________________________
__________________________________________________________________________

D. As CED, you will be held responsible for Civil Rights Compliance for all Extension programs in your county. You must have a good understanding of requirements, actions taken, and documentation staff members must retain in order to show that all programs are in compliance. There are two (2) documents you need to review to increase your working knowledge of your responsibilities in this
area. The two documents are (a) Oklahoma Cooperative Extension Service Compliance with Civil Rights, Equal Opportunity, and Affirmative Action Laws, Rules and Guidelines—a Working Document, April 1996, and (b) The County Civil Rights Compliance Review Guide, 1998 revision. These are used by District Directors in county civil rights audits. Set up an appointment with your District Director to discuss requirements for compliance when you complete this assignment. Record below questions you have for your District Director on civil rights compliance.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

STEP 6: Understanding your County Budgeting Process: As County Extension Director, you are charged with the responsibility and authority to negotiate for county funds appropriated for the operation of the county Extension office for the current fiscal year. State statutes govern the methods and procedures that must be followed in determining county fund appropriations. Some counties complete their budget through a county budget board while others use a process involving county commissioners and the county excise board. This self-study guide will now take you through a process to equip you with a knowledge base to prepare you for the budget negotiation process.

A. Getting to know your elected county officials. It is critical that you have a good working relationship with all your elected officials. You need to understand their job roles. They need to understand and have an appreciation for how Cooperative Extension programs add to the quality of life for their fellow citizens. County commissioners serve as administrators for county government and they sign our county contract when the budget is established. Therefore, it is very important for you to establish and maintain good working relationships with commissioners. You need to schedule an appointment with each of your elected officials in your county. Go to their places of business and begin to develop these good working relationships. Ask each elected official the questions listed below. You are not limited to these questions, but please include these questions and record a summary of their reply on each question.

**County Commissioner:**

Name ____________________________________________

Description of his/her district boundaries. ____________________________

__________________________________________________________________________
How many years has he/she served as county commissioner? ____________

Is he/she active in the Oklahoma county commissioners association and does he/she now hold or has he/she held an office in their state association? ________

___________________________________________________________

Does your county use a budget board or the county commissioner – excise board process to set the county general fund budget? Ask him/her to describe the process to you and explain their expectations of you in this process.

___________________________________________________________

___________________________________________________________

Ask if your county has a sales tax. If so, describe how the funds are appropriated and distributed. ________________________________________________

___________________________________________________________

Ask him/her of their past involvement and understanding of Extension programs.

___________________________________________________________

Ask if he/she has suggestions for needed programs Extension could provide and suggestions for you as a new county director: ____________________________

___________________________________________________________

___________________________________________________________

___________________________________________________________

Ask him/her to explain some of his/her main responsibilities as county commissioner. ________________

___________________________________________________________

County Commissioner:

Name ________________________________________________________

Description of his/her district boundaries. ____________________________

___________________________________________________________

How many years has he/she served as county commissioner? ____________
Is he/she active in the Oklahoma county commissioners association and does he/she now hold or has he/she held an office in their state association? 

_______________________________________________________________________

_______________________________________________________________________

Does your county use a budget board or the county commissioner – excise board process to set the county general fund budget? Ask him/her to describe the process to you and explain their expectations of you in this process.

_______________________________________________________________________

Ask if your county has a sales tax. If so describe how the funds are appropriated and distributed.

_______________________________________________________________________

_______________________________________________________________________

Ask him/her of their past involvement and understanding of Extension programs.

_______________________________________________________________________

_______________________________________________________________________

Ask if he/she has suggestions for needed programs Extension could provide and suggestions for you as a new county director.

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

Ask him/her to explain some of his/her main responsibilities as county commissioner.

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________
County Commissioner:

Name___________________________________________________________________

Description of his/her district boundaries. ____________________________________
_______________________________________________________________________

How many years has he/she served as county commissioner? _________________

Is he/she active in the Oklahoma county commissioners association and does he/she now hold or has he/she held an office in their state association? _______
_______________________________________________________________________

Does your county use a budget board or the county commissioner – excise board process to set the county general fund budget? Ask him/her to describe the process to you and explain their expectations of you in this process. 
_______________________________________________________________________
_______________________________________________________________________

Ask if your county has a sales tax. If so describe how the funds are appropriated and distributed._________________________________________________________
_______________________________________________________________________

Ask him/her of their past involvement and understanding of Extension programs. 
_______________________________________________________________________

Ask if he/she has suggestions for needed programs Extension could provide and suggestions for you as a new county director. ______________________________
_______________________________________________________________________
_______________________________________________________________________

Ask him/her to explain some of his/her main responsibilities as county commissioner. __________________________________________________________________________
_______________________________________________________________________
County Clerk:
Name: ____________________________________________________________________
Discuss the primary duties and responsibilities of the county clerk.
__________________________________________________________________________
__________________________________________________________________________
How many years has he/she served as county clerk? ____________________________
Ask the county clerk to summarize the county budget appropriation process used by your county.
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Does your county have a sales tax? If so, is it earmarked or designated to certain offices or functions.
Describe __________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Knowledge and involvement of the county clerk with Cooperative Extension Service. ________________________________
__________________________________________________________________________
__________________________________________________________________________
Suggestions county clerk would offer you as new CED:
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
County Treasurer:
Name: ____________________________________________________________________
How many years has he/she served as county treasurer? ________________________
Summarize primary duties and responsibilities for his/her office.
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Explain the County Treasurer’s role in the county budget process.

_______________________________________________________________________

Does your county have a sales tax? How is it designated for use and how will the funds to be distributed? ____________________________________________

_______________________________________________________________________

Past involvement and knowledge of Cooperative Extension Service. ________

_______________________________________________________________________

Suggestions treasurer would offer you as new CED: _________________________

_______________________________________________________________________

_______________________________________________________________________

County Sheriff:
Name: __________________________________________________________________

Number of years served in office of County Sheriff. _________________________

Primary duties and responsibilities. ________________________________________

_______________________________________________________________________

Past involvement and knowledge of Cooperative Extension Service. ________

_______________________________________________________________________

Suggestions he/she would offer you as new CED: _________________________

_______________________________________________________________________

County Assessor:
Name: __________________________________________________________________

Number of years he/she has served as county assessor. ______________________

Summarize the primary duties of the assessor. ______________________________

_______________________________________________________________________

_______________________________________________________________________
Assessor’s role in county budget process?

_______________________________________________________________________

Primary duties of the county assessor.

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

Past involvement with Cooperative Extension Service.

_______________________________________________________________________

_______________________________________________________________________

Suggestions he/she would offer you as new CED:

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

Court Clerk:
Name _____________________________________________

Number of years served in court clerk office.

Summarize primary responsibilities of court clerk.

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

Find out how court clerk is funded.

Past knowledge or involvement with Cooperative Extension Service.

_______________________________________________________________________

_______________________________________________________________________
County Excise Board – Excise board members are not elected. They are appointed. This board is very important in the county budget process particularly if a budget board is not in place. It is important that you know the board members and they know you and what the OSU Extension programs do for county citizens. Go meet each board member just as you did with elected officials.

Name of board member: ____________________________
Is he/she a member or chair of the board? ____________________________
Who appointed him/her to the board? ____________________________
How long has he/she served on the Excise Board? ____________________________
Ask him/her to describe the primary duties of the Excise Board. ____________________________
________________________________________________________________________

How is the Excise Board involved in county budget process? ____________________________
________________________________________________________________________

Ask about his/her past involvement and understanding of Cooperative Extension Service. ____________________________
________________________________________________________________________
________________________________________________________________________
Suggestions he/she would offer you as new CED: ____________________________
________________________________________________________________________
________________________________________________________________________

Name of board member: ____________________________
Is he/she a member or the chair of board? ____________________________
Who appointed him/her to board? ____________________________
How long has he/she served on the Excise Board? ____________________________
Ask him/her to describe the primary duties of the Excise Board. ____________________________
________________________________________________________________________

How is the Excise Board involved in the county budget process? ____________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Ask about his/her past involvement and understanding of Cooperative Extension Service.

__________________________________________________________________________

Suggestions he/she would offer you as new CED: ______________________________

__________________________________________________________________________

Name of board member: ______________________________________________________

Is he/she a member or chair of the board? ______________________________________

Who appointed him/her to the board? _________________________________________

How long has he/she served on the Excise Board? ________________________________

Ask him/her to describe the primary duties of the Excise Board. ________________

__________________________________________________________________________

How is the Excise Board involved in the county budget process? _________________

__________________________________________________________________________

Ask about his/her past involvement and understanding of Cooperative Extension Service.

__________________________________________________________________________

Suggestions he/she would offer you as new CED: ______________________________

__________________________________________________________________________

B. Understanding the Minimum Funding Guidelines established by Cooperative Extension Service. These guidelines are revised annually, normally in February or March and provided to all CED’s. Secure a copy of the current minimum funding guidelines. Answer the following questions:

1. List the minimum funding guidelines in order to have:
   - Two (2) county educators & one (1) secretary $_____________.
   - Three (3) county educators and 1.5 FTE secretarial assistance $_____________.

2. Counties are billed monthly by OSU for contractual services. Counties with two (2) educators pay $_______ per month.
   - Counties with three (3) educators pay $_______ per month.

3. The travel and M&O budget in a two (2) educator county at minimum funding guidelines would be $_____________.

4. The minimum annual funding requirements for a two educator county plus a full time program assistant would be $_________ per year. The county would be billed $_________ per month.

A. Schedule a conference with your District Director and discuss what you have learned while visiting with county officials. During this visit ask questions about the budgeting process and procedures. Be sure you understand how to correctly interpret Cooperative Extension minimum funding guidelines for your county. The county officials you have visited must be convinced of the importance and the need for Extension programs in your county. This means you need to develop and follow a good plan to keep these officials informed and involved with Extension programming. They must recognize and appreciate successful ways Extension programs have increased quality of life for county residents. While visiting with your District Director you need to develop a plan for accomplishing this important task. Record your plan below and share it with your county staff.

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

_______________________________________________________________________

STEP 7: Understanding county equipment inventory. CED’s are responsible for keeping up with all equipment in the County Extension Office. This includes maintaining a current equipment inventory list, adding new equipment purchased to the inventory, and removing unserviceable equipment from the inventory. County Extension Offices work with county funds and state funds. Therefore, County Directors are held accountable for keeping an up-to-date county equipment inventory and a state equipment inventory.

A. State equipment inventory – Equipment, machines, computers, etc. costing $500 or more and having a useful life of two (2) or more years must be added to your state inventory list. This means that a state inventory number will be assigned to that piece of equipment. There will be an OSU stick-on inventory number sent to you from OSU when you purchase equipment that cost $500 or more and that has a useful life of two (2) or more years. You need to attach this number to the designated piece of equipment.
B. Your county commissioners will also hold you, the CED, responsible for keeping up with equipment purchased with county funds. Check with your county clerk to get a briefing on county equipment inventory policies and procedures. Record the procedures below.

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

C. OSU Inventory Verification Process – On a bi-annual schedule you will receive an itemized copy of your total county office inventory from OSU. Please note that this list will include equipment purchased from state funds and equipment purchased from county funds. Check the coding to determine county purchased equipment and state purchased equipment. You will be responsible for checking the OSU inventory numbers attached to each piece of equipment against the number as listed on this inventory verification list. Follow instructions in the cover letter to make any needed changes.

Note: It is critical to use the correct funding code when purchasing equipment so that you don’t end up with the equipment in the wrong ownership code on your total OSU inventory list.

D. As a new CED, it is good management to secure the latest OSU Inventory List from your files and do a check to make sure the inventory is accurate and all equipment is accounted for as stated on the inventory list. Do the same check against your county inventory list.

E. Caution! Removal of equipment from your county or state inventory must be done in compliance with policies and procedures as established by the funding agency – county or state. State inventory policies, procedures and forms can be viewed and printed from electronic web site

http://intranet.okstate.edu/Fiscal_Affairs/inventory.htm

STEP 8: Advisory System. The County Extension Director is responsible for establishing and maintaining an Advisory System. The advisory council and other advisory committees must conform to Cooperative Extension Guidelines. You, the CED, will be held responsible for developing and involving the Extension Council so that it will function in an active advocacy role for the total Cooperative Extension Program in your county. Contact your District Director for current guidelines and requirements.
**STEP 9:** By completing the steps outlined in this orientation guide you should be well equipped with the knowledge of policy, procedures and processes involved in the role of County Extension Director. This guide will help to get you off to a good start in this important role. Remember, as CED you will be setting the example for your co-workers in the county office. If you arrive to work on time, your co-workers will usually arrive on time; if you keep your office space neat and orderly, they will keep their office space neat and orderly; if you are a good team player, they will be good team players; if you meet your commitments in a timely manner, they will follow suit. We could go on and on, but you must understand that you set the example! Set high goals and standards and your staff will follow! Good luck in your new position as County Director.

Appreciation is extended to Ronnie George, Assistant to the OCES Associate Director and former Northeast District Director, for the development of this orientation guide.

The Oklahoma Cooperative Extension Service considers applicants without discrimination for any non-merit reason such as race, color, national origin, religion, gender, age, or disability, or status as a Vietnam-era veteran. OSU and the Division of Agricultural Sciences and Natural Resources are committed to multicultural diversity.