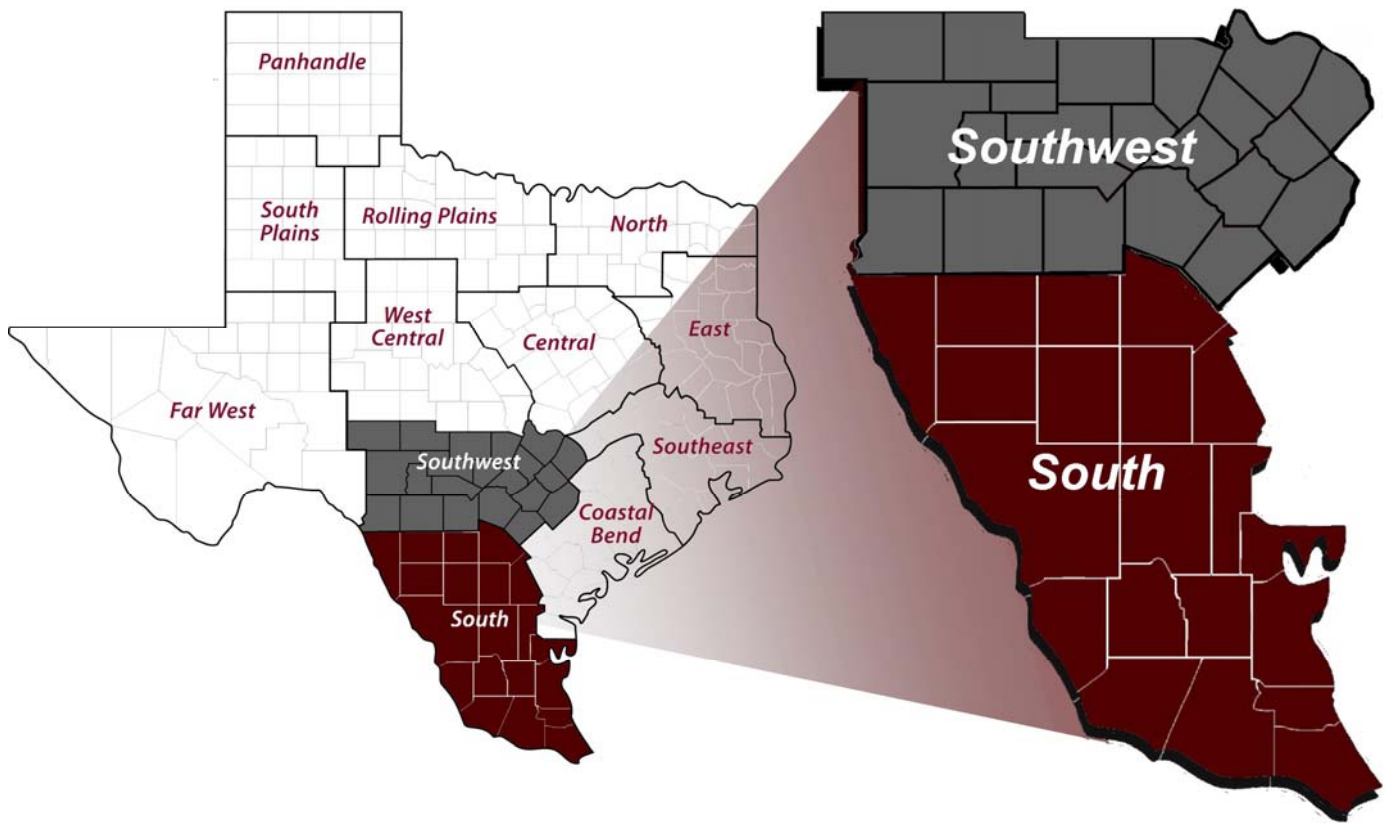


TEXAS A&M AGRI LIFE EXTENSION



Regional Onboarding Guide

Revised October 11, 2018

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Your First 30 Days

Welcome!

***“Coming together is a beginning, staying together is progress,
 and working together is success.”***

- **Henry Ford**

Welcome to Texas A&M AgriLife Extension Service where our mission is *“to improve the lives of people, businesses, and communities across Texas and beyond through high quality, relevant education.”* We strive to meet our vision, *“to be the premier 21st Century outreach and continuing education organization in Texas responding to the needs of the people.”* Congratulations on your appointment to the position of County Extension Agent! We know that you will be a great asset to our district & regional team, and we look forward to helping you build a positive working relationship with your AgriLife Extension family. There’s always a lot to learn when you begin a new job, not only about the job responsibilities, but also about our culture and the day-to-day organizational procedures. During the onboarding process, there will be a number of people to assist you, including but not limited to:

In District 10,

District Extension Administrator
 Regional Program Leader
 Regional Program Leader
 County Extension Director
 County Extension Director
 4-H & Youth Program Specialist
 District Office Manager

Supervisor
 Programming—FCH & 4-H
 Programming—ANR & 4-H
 Supervisor –Travis County
 Supervisor – Bexar County
 District 4-H Program
 Assistant to DEA – HR/Payroll/Admin

Kathleen L. Greer
 Jana Osbourn
 Todd Swift
 Maggie Johnson
 Nelda Speller
 Megan Logan
 Rosy Melchor

In District 12,

District Extension Administrator
 Regional Program Leader
 Regional Program Leader
 4-H & Youth Program Specialist
 District Office Manager

Supervisor
 Programming—FCH & 4-H
 Programming—ANR & 4-H
 District 4-H Program
 Assistant to DEA—HR/Payroll/Admin

Dr. Ruben J. Saldaña
 Jana Osbourn
 Todd Swift
 Luis H. Saldaña
 Lou Garza

There are also subject matter Specialists who will be working with you in educational events. If you are participating in the First Step to Success program, you will be assigned to a mentor county for your first 30-days of employment. You will also be assigned a mentor who will work closely with you during your first year of employment. In addition, coworkers and district-based staff are here to listen and provide feedback and advice. There’s a lot to learn in the first couple of years, but you have a network of coworkers here to assist you. We want you to succeed!

The first two years is the “onboarding process.” The purpose of an onboarding process is to smoothly integrate new employees into their positions and organizational culture. During this time, you will be asked to take online trainings and attend live trainings to acquaint you with our organization and your job responsibilities. You will be receiving training assignments through TrainTraq, or through email or written communications. You are encouraged to take care of these trainings in a timely manner and to do all of the preparation work requested before attending training. Remember that when you attend training—particularly those at the state office— you are representing our district/region, and you are expected to attend, to be punctual, to be attentive, to maintain a positive attitude, and to act professionally. It is our privilege and honor to welcome you to your new career with Texas A&M AgriLife Extension Service.

Sincerely,

Ruben J. Saldaña
 District Extension Administrator, District 12
ruben.saldana@ag.tamu.edu

Kathleen L. Greer
 District Extension Administrator, District 10
kl-greer@tamu.edu

At a Glance

In your first 30 days, you will be given a great deal of information, both orally and in writing. You will meet a lot of people and have to sort through a lot of information. You will likely feel overwhelmed, but the important part is to organize yourself, take notes, and learn where to go when you have questions later. Listen actively but don't be afraid to speak up if you don't understand something or have a question. Remember that the process of learning this job will take time so be patient and persistent as you learn and grow in your new role.

District Processing

On your first day of work, or within 2-3 days of starting, you will need to be processed as a new employee. This will include the following items.

- Explanation of benefits
- Introductions to District Office personnel and tour of facility
- List of District Office personnel and subject matter expertise
- Onboarding website and discussion of resources available at onboarding.tamu.edu
- Concur travel system employee profile setup; blanket travel request; basic travel rules and procedures; use of hotel tax exemption; Google Maps for mileage
- First Step Do's and Don'ts—vehicle mileage log; one trip per day; reimbursement
- Review of HR/onboarding trainings to be completed and timeline for completion
- Payroll schedule; dates for possible state/county increases
- Single Sign-On overview; online pay stubs; electronic deposit of payroll, travel and reimbursement checks; online W-2s; annual enrollment
- Ordering business cards and name badge
- Holidays for CEAs; state floating holidays
- Leave and how to request time off
- Monthly report submission (OneDrive reports due 10th; TexasData reports due 7th)
- Progress evaluations (after 4th and 7th month; annual)
- External employment and consulting form (if applicable)
- District website and resources

DEA/CED Orientation

On your first day of work, or within your first 30 days of employment, your District Extension Administrator (DEA) or County Extension Director (CED) will provide you with a formal welcome and an administrative orientation to the district. This will include a broad overview of your assignment along with specific instructions for your first 30 days of work. He/She will also schedule follow-up meetings with you after you have been in your home county for a month, then again after 3 months, 6 months, and at the 1 & 2 year marks. The DEA/CED serves as your immediate supervisor but will cover items related to budget, human resources, and operational issues. DEAs/CEDs are charged with administrative and operational responsibilities so discussions will generally focus on those types of subjects. DEAs/CEDs are responsible for the overall coordination of your onboarding experience and your professional development.

RPL Orientation

At some point during your First Step Program or in the first month in your Home County, your Regional Program Leader (RPL) will contact you to set up a program orientation. This orientation will be focused on programming expectations and subject matter support. RPLs are responsible for providing direction and support to program development, implementation, and evaluation so your plans, programming expectations, and evaluation issues so discussions will generally focus on those types of subjects. They are responsible for professional development associated with subject matter.

District 4-H Program Orientation

At some point during your First Step Program or in the first month in your Home County, your District 4-H Specialist will contact you to set up a 4-H program orientation. This orientation will be focused on 4-H program management at the county level and the district 4-H events that it supports. The District 4-H Specialist is responsible for training and support as it relates to 4-H program management. In addition, the 4-H specialist is responsible for coordination of district 4-H events along with district support of state 4-H events and activities. They will cover a range of topics and are available as a resource to you on an ongoing basis for 4-H program-related management issues.

Setting Up Your Office

The First Step program makes allowances for time that you can use to set up your office. Once you are enrolled, you should have working email and access to the AgriLife computer network. Use your first month to ensure that your office is functional and ready for you when you begin your first day of work in your home county. Surplus property may be available on campus or at the district office if you have needs related to office furniture or equipment. A county-cost share program is available for technology (computers, printers, scanners, projectors, etc.) but you should consult with your DEA and your county coordinator before any request is made. County budget funds must be available before these purchases are made.

Your First Step Experience

The First Step to Success Program was created to provide new agents with an opportunity to observe programs and office operations in other counties for a 30 day period prior to their first work day in their home county. Your DEA/CED will arrange for this experience and provide you with instructions and details for this program. A journal is provided to each new agent to allow them to take notes on key points and to capture thoughts and questions for future discussion with mentors, RPLs, specialists, or DEA/CED. New agents are encouraged to take full advantage of this opportunity to observe as much as possible, ask questions, and gain insight into their role as a county Extension agent before assuming that role formally in their home county.

Submitting First Step Travel Expenses

- CEA works in host county or counties during first 30-days of employment.
- Travel & salary paid 100% by state office—no county funding until first day in headquarters county.
- Travel limited to one trip per day from home to host county or location of work for the day.
- Headquarters for travel purposes during First Step is personal residence address.
- Keep daily mileage log (<https://agriflifeas.tamu.edu/documents/ag-808.pdf>), including odometer readings and physical addresses of departure/arrival locations. Your mileage log will be used to complete your expense report in Concur.
- Request for travel reimbursement must be submitted through SSO/Concur.

Your First Month in Home County – Getting Connected

At a Glance

This is your first month in your assigned county. It's a good time to assure your office is functional and a time to meet people in your county and to begin developing relationships internally (within the organization) and externally (in the community).

Meeting Your Mentor

Once you've completed First Step, you begin duties in your home county. At that time, you will be assigned a mentor. Mentors are experienced agents that have volunteered to assist new agents with guidance in learning the job of a County Extension Agent. Their role is to show you the way as a new agent, helping explain key concepts in Extension and helping you navigate the agency and learn what you'll need to know to be successful. One mentor will be appointed and will contact you when you begin in your home county to welcome you and get the program started. These mentors will be asked to help for a year in a formal capacity but are always willing to help beyond that time when you have questions. Each will be selected for their knowledge and experience, with diversity as a consideration to ensure you get a mixed group of agents to call upon for support and assistance. Your success is their goal.

New Agent Self Study Guide

When you receive your onboarding notebook, it will include a New Agent Self Study Guide. This guide is a self-paced exercise that allows you to research key information about your home county and record it in this document. Among the data is demographic information, the names of community leaders, social characteristics, and related information that should be helpful for you to know as a new agent. This information is for your benefit and later use. You will be given six months to complete it and submit a copy to your DEA/CED.

Extension Fundamentals: Newsletter Series

Another part of your onboarding notebook includes a series of eight newsletters that relate to Extension. The first explains a little about the beginnings of Extension and the newsletters the move into topics about program development, adult learning theory, evaluation, and how to interpret data to stakeholders. You will be asked to read these newsletters

Meeting Your County Office Staff

Each County Office has a series of program areas that include agriculture and natural resources, family & community health, 4-H & youth development, and community development. These areas may be supported by specialized agents in Integrated Pest Management (IPM), Sea Grant/Marine, Expanded Food & Nutrition Education Program (EFNEP), Better Living for Texans (BLT), Horticulture, Family Resources, Cooperative Extension Program (1890), and others. Your office may also have support staff assigned to provide administrative support, such as office managers, administrative assistants, or program support staff such as BLT or 4-H program assistants. Get to know your co-workers and remember that you are a team.

Meeting Your County Officials

Because part of our funding comes from county government, we are part of county government at the local level. Our county coordinators are regarded as department heads and our county budgets give us the ability to operate locally. As such, it's our responsibility to build relationships with county officials because we are accountable to them for the funding they provide. The county judge serves as the CEO for the county. Administration of county government is provided by a "commissioner's court" that is made up of the county judge and four commissioners. They are the legislative branch of government at the county level and are responsible for developing and passing a county budget and for approving expenditures for the county. They make all decisions related to county government and normally meet at an appointed day and time each month at a minimum. In addition to the court, there is a county auditor that is appointed independent of the court and is responsible for the proper accounting of all revenue and expenditures by the county. The county treasurer is elected and is usually the person who is entrusted with holding and investing county funds. They are often responsible for payroll as well but work closely with the Auditor. There are other county elected officials that you should get to know such as the county clerk, county sheriff, district clerk, JPs, and others. Most are elected, and some are appointed. All of them occupy positions that have the potential to benefit you in your role as an agent so meet them and create opportunities to build a relationship with them. They are your colleagues within county government.

Meeting Community Leaders & Stakeholders

Community leaders and stakeholders are people who may not be direct beneficiaries of Extension programs but are opinion leaders in the community. It benefits our agency if they know who we are, what we do, and how we benefit the community because their opinions shape public opinion, including the opinion of court members, state officials, and federal officials that serve the county. Examples of these leaders include bank officers, superintendents, civic club leaders, mayors and city officials. They may be people in high profile positions or they may be people who are highly regarded for other reasons. They are good choices for your Leadership Advisory Board. Make sure as many of these people as possible know who you are.

Meeting your Program Stakeholders

Program stakeholders are people in the community who have a vested interest in Extension and our various programs. These include livestock show board members, ag science teachers, farmers or rancher organizations, landowners, commodity organizations, agency partners, schools, various community organizations, and others who benefit from our programs. It's important to learn who these people are and to build a relationship with them because you will be working closely with them.

Meeting your Program Clientele

Program clientele are those you will directly be serving. Those include your committee members, 4-H members, 4-H parents and volunteers, 4-H club managers, agricultural cooperators, individual farmers, ranchers, and landowners, and other direct members of the public who routinely use our services. Most you will see them often but some you may only see them once but their satisfaction with the quality of our programs and services help shape public opinion and support for our agency locally.

Basics About Extension

Texas A&M AgriLife Extension Service has been a part of county, state, and national government for over a century, yet it continues to be misunderstood in terms of both funding and purpose. We hope this manual helps to answer questions and set standards for how your county office is managed and organized and how you work and communicate with organizational stakeholders. The names and faces may change over time, but our mission and commitment to serving the public with high quality educational information, training, and technical assistance will always remain, bringing reliable solutions to real-world problems and issues of concern to the communities we serve.

Our Legal Basis & Purpose

Our Federal Partner: USDA – National Institute of Food & Agriculture (NIFA)

The (Federal) Smith-Lever Act of 1914 - Creation of a Cooperative Extension Service System

Established in 1914, Cooperative Extension was designed as a partnership of the U.S. Department of Agriculture and the land-grant universities, which were authorized by the Federal Morrill Acts of 1862 and 1890. Legislation in the various States has enabled local governments or organized groups in the Nation's counties to become a third legal partner in this educational endeavor. The congressional charge to Cooperative Extension through the Smith-Lever Act of 1914 is far ranging. Today, this educational system includes professionals in each of America's 1862 land-grant universities (in the 50 States, Puerto Rico, the Virgin Islands, Guam, Northern Marianas, American Samoa, Micronesia, and the District of Columbia) and in the Tuskegee Institute and sixteen 1890 land-grant universities. The provisions of the Act, in effect as of December 23, 1915, are shown in greater detail in Appendix I. (Code reference is 7 U.S.C. 341 et seq.)

Our Link to County Government

Authorization for the establishment and ongoing support of Cooperative Extension in the State of Texas is cited in the Agriculture Code of Vernon's Civil States, Chapter 43, Subchapter B.

SUBCHAPTER B. COUNTY DEMONSTRATION WORK

Sec. 43.031. Demonstration Work.

"The commissioners' court of any county may establish and conduct cooperative demonstration work in agriculture and home economics in cooperation with Texas A & M University. Acts 1981, 67th Leg., p. 1096, ch. 388, Sec. 1, eff. Sept. 1, 1981."

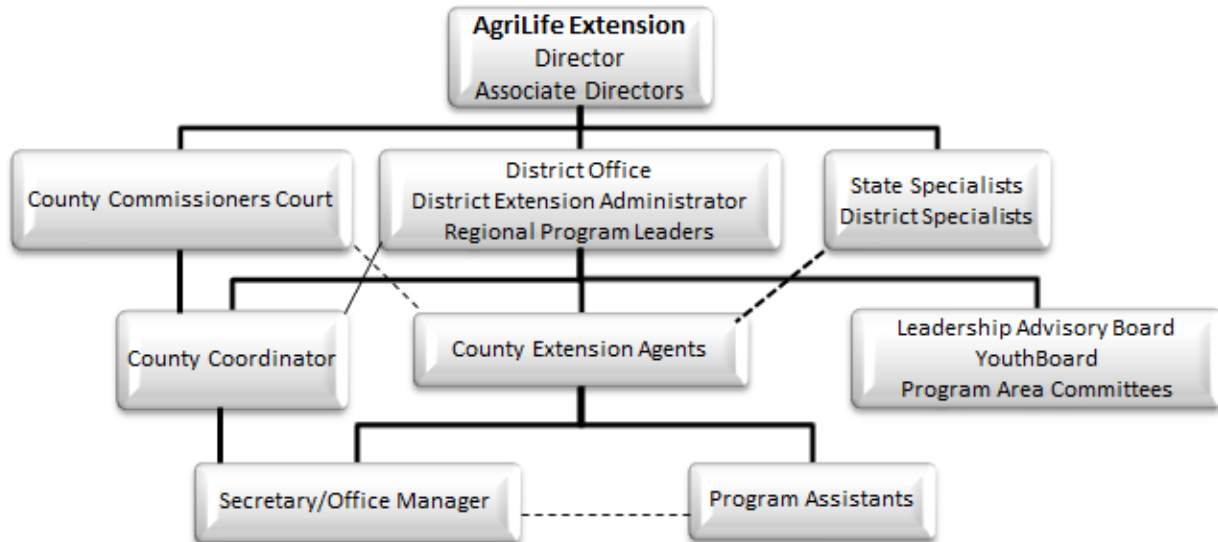
Sec. 43.032. Terms of Agreement with Texas A & M University.

"The demonstration work shall be conducted on terms and conditions agreed to by the commissioners court and the agents of Texas A&M University. Acts 1981, 67th Leg., p. 1096, ch. 388, Sec. 1, eff. Sept. 1, 1981."

Sec. 43.033. Expenses.

“The commissioners’ court may employ any means and may appropriate and expend money as necessary to establish and conduct demonstration work under this subchapter. Acts 1981, 67th Leg., p. 1096, ch. 388, Sec. 1, eff. Sept. 1, 1981.”

County Organizational Snapshot



What is Extension?

Texas A&M AgriLife Extension Service is a statewide educational agency and a member of The Texas A&M University System linked in a unique partnership with the nationwide United States Department of Agriculture Cooperative Extension System and County Commissioners Courts. Extension values and promotes principles of citizen and community involvement, scientifically-based education, lifelong learning and volunteerism. It provides access to citizens in all 254 Texas counties and works cooperatively with the 11 universities and 7 state agencies of The Texas A&M University System and other state and local agencies to bring the necessary resources to local communities that will address local issues and solve local problems.

Mission and Scope

Texas A&M AgriLife Extension Service educates Texans in the areas of agriculture, environmental stewardship, youth and adult life skills, human capital and leadership, and community & economic development. The County Office offers the knowledge resources of the Texas A&M University System to local citizens for self-improvement, individual action and community problem solving.

Vision

We envision the Extension Service as Texas’ most significant and effective vehicle for outreach education and community statewide problem solving related to issues impacting the quality of life for Texans in the 21st century. We will be increasingly accessible through the use of advanced communication technologies. We will be a major catalyst for leveraging public and private resources through cooperative efforts and coalitions, and we will be focused on

education for individual and community self-help to address critical needs. We see Extension as dedicated to fulfilling its land-grant university mandate in the context of a rapidly changing society.

Priorities

Texas A&M AgriLife Extension Service has a mission to provide quality, relevant outreach and continuing education programs and services to the people of Texas. Extension education encompasses the broad areas of agriculture and natural resources, community economic development, family and community health, and 4-H and youth development. In the context of this broad mission, the FIVE GRAND CHALLENGES of Texas A&M AgriLife are as follows:

1. Feeding Our World
2. Protecting Our Environment
3. Improving Our Health
4. Enriching Our Youth
5. Growing Our Economy

Goals and Objectives

To pursue these priorities, the agency will follow a strategic plan comprised of *programmatic* goals and objectives. In addition, this strategic plan addresses organizational excellence – the alignment of every facet of the organization to support effective program delivery.

Organizational goals and objectives are set forth in the following areas:

- | | |
|--|---|
| 1. Accountability | 7. Internal Communication |
| 2. Delivery System for Urban Audiences | 8. Marketing and External Communication |
| 3. Diversity | 9. Professional Development |
| 4. Employee Recognition and Rewards | 10. Quality Assurance |
| 5. Financial and Resource Management | 11. Risk Management |
| 6. Information Technology | 12. Volunteerism |

A full listing of all organizational goals and objectives can be viewed at

<https://agrilifeextension.tamu.edu/about/who-we-are/>

Core Values

The core values of Extension embody the philosophy of the land-grant university system, the guiding principles of the Cooperative Extension System and a commitment to the people of Texas. The Extension Service and its faculty and staff value:

- The land-grant concept that the knowledge resource of universities should be extended to the people.
- Scientific knowledge and its usefulness in solving practical problems and producing benefits for the people.
- Involvement of citizens for their programmatic input, help as volunteers and their pursuit of lifelong learning.

- Cultural diversity in programs, clientele, volunteers, faculty and staff.
- Cooperation and collaboration with federal, state, county and local governments; public and private agencies, organizations and groups; and individuals to attain goals.
- The state's land and natural resource base and the significance of those resources to both rural and urban areas.
- Agriculture, as a fundamental sustainer of life for all people, a basic industry and a force of significant impact on society.
- Communities, families and youths and their importance to the future of Texas.
- An objective, unbiased approach to problem solving for all employees as well as volunteers and others involved in Extension education.
- Ethical behavior on the part of all faculty, staff, volunteers and others involved in Extension education.
- Education as a force for meaningful change and economic vitality for Texas.

PEOPLE YOU SHOULD KNOW

Texas A&M AgriLife Extension Administration

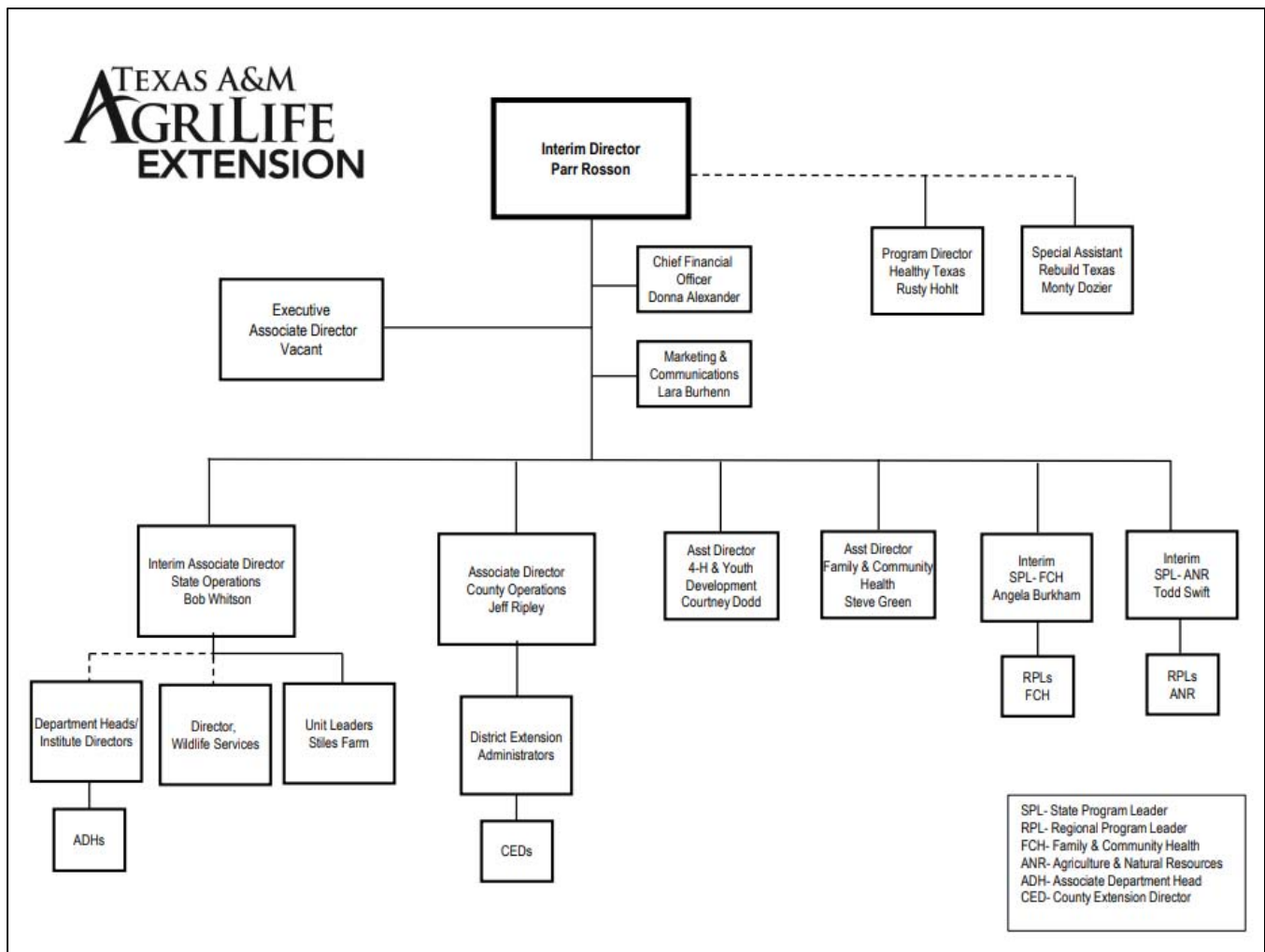
Dr. Patrick Stover	Vice Chancellor & Dean (COALS)
Dr. Parr Rosson	Interim Director
Vacant	Executive Associate Director
Vacant	Associate Director for Program Development
Dr. Bob Whitson	Interim Associate Director - State Operations
Dr. Jeff Ripley	Associate Director for County Operations
Dr. Courtney Dodd	Assistant Director for 4-H & Youth Development
Dr. Steve Green	Assistant Director for Human Science
Ms. Donna Alexander	Assistant Director for Fiscal Services
Mr. Bill McConnell	Assistant Agency Director - Compliance

South Region Administrative Team

Ms. Kathleen Greer	District 10 Extension Administrator (Uvalde)
Dr. Ruben J. Saldaña	District 12 Extension Administrator (Weslaco)
Ms. Jana Osbourn	Regional Program Leader – FCH & 4-H
Mr. Todd Swift	Regional Program Leader – ANR & 4-H
Ms. Nelda Speller	County Extension Director - Bexar County (San Antonio)
Ms. Maggie Johnson	County Extension Director – Travis County (Austin)

Funding Relationships

Texas A&M AgriLife Extension Service is a cooperative funding effort that includes the United States Department of Agriculture (USDA) , The Texas A&M University System (TAMUS), and County Commissioner’s Courts of Texas as major cooperators. USDA makes a contribution to Texas A&M AgriLife Extension Service that is included in the total annual budget, the State of Texas appropriates funds that make up the state portion, and county government provides and locally allocates the final approximate 1/3 of this formula. State and federal funds go primarily to agent salaries and benefits, specialist support, and state administration. County government provides for the establishment and maintenance of a local office, including support staff, travel, and supplies.



Where is Extension Located?

Texas A&M AgriLife Extension Service is a state agency and a member of the Texas A&M University System. Extension is divided into 12 districts across the state, with a District Extension Administrator (DEA) in each district. Two Regional Program Leaders (RPL) provide programmatic leadership for a 2-district region in the areas of Agriculture and Natural Resources, Family and Community Health, and 4-H Youth Development. They may be located in any one of the district offices but serve the region as a single unit. In addition, there are seven urban programs, each supervised by a County Extension Director. County Extension agents across the state are supported by subject matter specialists located on campus or at a district Extension field office. Some specialists may be based at other state universities or locations based on joint appointments with those universities or other partner organizations. State leadership is provided by an administrative team from the headquarters office on the Texas A&M University campus in College Station.

THE LAND GRANT SYSTEM

A land-grant college or university is an institution that has been designated by its state legislature or Congress to receive the benefits of the Morrill Acts of 1862 and 1890. The original mission of these institutions, as set forth in the first Morrill Act, was to teach agriculture, military tactics, and the mechanic arts as well as classical studies so that members of the working classes could obtain a liberal, practical education. Passage of the First Morrill Act (1862) reflected a growing demand for agricultural and technical education in the United States. The Act provided grants in the form of federal lands to each state for the establishment of a public institution to fulfill the act's provisions. While a number of institutions had begun to expand upon the traditional classical curriculum, higher education was still widely unavailable to many agricultural and industrial workers. The Morrill Act was intended to provide a broad segment of the population with a practical education that had direct relevance to their daily lives. In Texas, the institution created was Texas A&M University and was established in 1876. There is now at least one land-grant institution in every state and territory of the United States, as well as the District of Columbia.

Certain Southern states have two land-grant institutions as a result of the Second Morrill Act. In addition, some western and plains states have several of the 1994 land-grant tribal colleges. The Second Morrill Act (1890) sought to extend access to higher education by providing additional endowments for all land-grants but prohibiting distribution of money to states that made distinctions of race in admissions. However, states that provided a separate land-grant institution for blacks were eligible to receive the funds. In Texas, the Second Morrill Act helped establish Prairie View A&M University. Prairie View A&M University was established in 1876 as well and supports the Cooperative Extension Program, a program it jointly administers with Texas A&M AgriLife Extension Service.

A key component of the land-grant system is the agricultural experiment station program created by the Hatch Act of 1887. The Hatch Act authorized direct payment of federal grant funds to each state to establish an agricultural experiment station in connection with the land-grant institution there. The amount of this appropriation varies from year to year and is determined for each state through a formula based on the number of small farmers there. A major portion of the federal funds must be matched by the state.

To disseminate information gleaned from the experiment stations' research, the Smith-Lever Act of 1914 created a Cooperative Extension Service associated with each U.S. land-grant institution. This act authorized ongoing federal support for extension services, using a formula similar to the Hatch Act's to determine the amount of the appropriation. This act also requires that the states provide matching funds in order to receive the federal monies.

(Source: <http://www.wvu.edu/~exten/about/land.htm#why>)

What is the Texas A&M University System?

The Texas A&M University System includes a series of 11 universities and 7 state agencies. They are as follow:

UNIVERSITIES

Texas A&M University - *College Station

* includes TAMU - Galveston

Texas A&M University - Commerce

Texas A&M University - Texarkana

Texas A&M University – Kingsville

Texas A&M University – Central Texas

Texas A&M University – San Antonio

Texas A&M University - Corpus Christi

Texas A&M International University (Laredo)

Tarleton State University (Stephenville)

Prairie View A&M University (Prairie View)

Baylor College of Dentistry (Dallas)

West Texas A&M University (Canyon)

Texas A&M Health Science Center

STATE AGENCIES

Texas A&M AgriLife Extension Service*

(includes Wildlife Services)

Texas A&M AgriLife Research*

Texas A&M Engineering Experiment Station (TEES)

Texas A&M Engineering Extension Service (TEEX)

Texas A&M Forest Service (TFS)*

Texas A&M Veterinary Medical Diagnostic Lab (TVMDL)*

Texas A&M Transportation Institute (TTI)

* indicate agency members of Texas A&M AgriLife

What is Texas A&M AgriLife?

Texas A&M AgriLife is a coalition of teaching, research, and extension components within the Texas A&M System that support Agriculture through higher education. Members of Texas A&M AgriLife include the Texas A&M University College of Agriculture and Life Sciences (COALS), AgriLife Research, AgriLife Extension, TFS, and TVMDL. It also includes the colleges of agriculture at all System universities with a College of Agriculture (Tarleton, West Texas, Kingsville, and Prairie View).

Training & Professional Development

At a Glance

As a new employee, there are certain things you'll need to learn and certain skills you'll need to develop to become an effective Extension Agent. These skills revolve around leadership, program development, educational methods, evaluation, building relationships, and specific knowledge development in day-to-day operations. Below are specific training expectations set for new employees along with skill sets you would be expected to learn at these key milestones.

Within the first 30 days	
<p>You should have...</p> <ul style="list-style-type: none"> Completed all HR training modules Completed First Step Program & Journal Completed reading Newsletter #1 & 2 Participated in DEA/CED, RPL, & 4-H Orientation 	<p>You should be able to...</p> <ul style="list-style-type: none"> Access AgNet, Outlook, Skype for Business, 4-H Connect, Laserfiche, TExAS Data Have a basic understanding of Extension Understand the general nature of your job
Within the first 90 days	
<p>You should have...</p> <ul style="list-style-type: none"> Been assigned a mentor(s) Set up program plans on TExAS Participated in a 3 month progress review Met with LAB, Youth Board, PACs Revised county job responsibilities 	<p>You should be able to...</p> <ul style="list-style-type: none"> Report to TExAS Understand full scope of your responsibilities Develop a local calendar of programs and events Understand role of program development Respond to local program questions
Within the first 6 months	
<p>You should have...</p> <ul style="list-style-type: none"> Attended Foundations Participated in a 6 month progress review Interacted actively with mentor(s) Completed reading Newsletter # 3-5 Begin Implementing youth and adult programs 	<p>You should be able to...</p> <ul style="list-style-type: none"> Develop a program plan Communicate with key leaders about what you do Have working knowledge of 4-H program Fully understand all county office operations
By Year 1	
<p>You should have...</p> <ul style="list-style-type: none"> Attended Career Ladder training Attended Academy Participated in a performance appraisal conference Completed reading Newsletters # 6-8. Joined a professional association 	<p>You should be able to...</p> <ul style="list-style-type: none"> Develop a vita Implement program development Effectively plan and implement a program Evaluate a program Effectively communicate with key leaders about program outputs
By Year 2	
<p>You should have...</p> <ul style="list-style-type: none"> Attended a state association meeting Obtained pesticide application license (ANR only) 	<p>You should be able to...</p> <ul style="list-style-type: none"> Plan, implement, and evaluate a program independently Effectively communicate with key leaders about program outcomes and the public value of your programs

Who are your elected officials?

County Officials

The Honorable _____
County Judge
Admin. Asst. : _____

The Honorable _____
Commissioner, Pct. 1

The Honorable _____
Commissioner Pct. 2

The Honorable _____
Commissioner, Pct. 3

The Honorable _____
Commissioner, Pct. 4

_____, County Auditor

_____, County Treasurer

_____, County Attorney

_____, County Clerk

When writing, the word "Honorable" is used as a courtesy accorded to all elected officials. When speaking to these officials, use their highest title (Judge, Commissioner, Congressman, Chairman) unless you're not sure...then use Mr. or Ms.

State Officials

The Honorable _____
State Representative, District ____
Address: _____

Phone: _____
Email: _____
Website: _____

State Officials (continued)

The Honorable _____
State Senator, District ____
Address: _____

Phone: _____

Email: _____

Website: _____

Federal Officials

U.S. Congressman

The Honorable _____
U.S. Representative, District ____
Address: _____
Phone: _____
Email: _____
Website: _____

U.S. Senators

The Honorable **John Cornyn**
United States Senator, Texas
In District 12
222 East Van Buren, Suite 404
Harlingen, Texas 78550
(956) 423-0162
(956) 423-0193 fax
In Washington,
517 Hart Senate Office Building
Washington, DC 20510
202-224-2934
202-228-2856 fax
<http://cornyn.senate.gov/>

The Honorable **Ted Cruz**
United States Senator, Texas
In Washington,
Dirksen Senate Office Building, Ste SDB-40B
Washington, D.C. 20510
202/224-5922
<http://www.cruz.senate.gov>

Getting Connected to the Extension Network

District Dates & Deadlines

A district calendar will be provided to you in your onboarding materials that provides a listing of all district meetings, activities, and deadlines. If this list does not include district 4-H events, then a separate list of 4-H events with 4-H deadlines can be obtained from the district 4-H specialist. Please transfer these dates to your personal working calendar to ensure you keep those commitments. If you have questions about which dates pertain to you and which don't, consult the DEA, RPL, or the District 4-H specialist for guidance.

Getting to Know District and Regional Specialists

Each district office serves as a headquarters for subject matter specialists who are responsible for support of county programs in their assigned discipline. Their assigned districts may be limited to a district, multiple districts, or a region. They may also have statewide responsibilities in certain areas. Regardless, these specialists are there to support and assist. Learn who they are and take time to meet them personally if possible or at least by phone until you can meet them face to face.

Getting to Know Statewide Specialists

Beyond field-based specialists located at the various research and extension centers across the state, Texas A&M AgriLife has campus-based specialists that are available to answer questions, provide technical support, and assist you in other ways related to program development, delivery, and evaluation. Remember that their role is to support you so feel free to contact them directly when you need their help with an issue in your county that requires an educational response. This could be a question from a client, an applied research demonstration project, a group program, or simply the need to brainstorm through an issue when you're trying to figure out how to approach a complex issue in your county. Develop a network of specialists to support you in your county.

Getting to Know Administrators

Administrators that you will likely have the most contact with will be your immediate supervisor, which will be your CED or DEA, along with your designated Regional Program Leader (RPL). While you can expect them to make contact with you periodically, it's always a good idea for you to keep in contact with them as well to advise them of milestones, progress, successes, and even disappointments as you begin to build your program. While they are internal, they are also stakeholders in your program with a vested interest in your success. It's also important that you know who our leadership team is at headquarters and learn their roles. At some point, you'll get to meet them, so it will be important to know who they are and what they do in advance.

Establishing Your County ANR, FCH, CRED Program

Updating Your County's Job Responsibilities

Each county develops an annual listing of job responsibilities. This outlines the specific duties that each agent is responsible for carrying out during the year and establishes leadership for program areas, activities, and events. Once you begin duties in your home county, the job responsibilities will need to be revised to include you. These should be developed in consultation with the DEA and must be approved by the DEA. Job responsibilities are updated and submitted annual for review and approval.

Getting your Committees Functioning

One of the most important tasks of a new agent is to get a copy of committees in the county along with their membership and to begin assessing the program development structure for any needed changes. Because our programs are community-based, they require stakeholder buy-in and our programs must be developed based on the needs expressed by these committees and with programs and activities endorsed and supported by them. It's critical to begin meeting these committee members and taking the steps necessary to assure that they are functional and active. These committees include a Leadership Advisory Board, Youth Board, and program area committees as outlined in job responsibilities. In multi-agent counties, the leadership for these groups are specified in the job responsibilities document.

Setting up your program plans on Texas Data

Before you can begin to report the things you are doing, you need to set up plans in Texas Data. The DEA is responsible for helping you set up an organizational support plan if one is not already established. Your designated RPL is responsible for helping you set up program plans. Once they are set up and approved, you can begin reporting. This should be done no later than by the end of the first month in your home county. For your first year, plans will generally be simple and designed to capture what you do. The next cycle of program planning will require you to design and upload a more comprehensive plan using the guidance and direction provided by your local committees. These plans are then proposed to your designated RPL for review and approval. Specialty agents such as CEP, Marine, IPM, EFNEP, Military, and others may have a unit program leader designated to review their plans prior to approval by the RPL.

Initiating your educational programs

Stakeholders, leaders, and clientele in your county are expecting programs and services so at some point you will need to begin to develop a calendar of educational programs, activities, and events to support your areas of responsibility. Be sure to include and involve partners, committee members, co-workers, and others as you develop programs to address local needs. Remember that while these programs are often non-formal, they are still educational in nature and our role is to ensure that our clientele benefit from them in some measurable way. Remember to involve the audience, develop educational methods that are effective, and consider ways to measure how clientele will benefit so that you can easily answer "So What?" about the programs you are providing.

Your role in support of team plans

Many plans in your county and in surrounding counties may be team plans. You may be a team member on these plans, which means that you are not the lead agent, but you do have some role to play in support of these plans which may include leadership for certain activities within the overall plan or a support role in these activities. If you are included on team plans, you are also required to report your efforts in support of this plan monthly. Examples of these plans could be county 4-H plans, organizational support, community development, emergency management, or multi-county plans where the program is being implemented in multiple counties. You must be added to these plans by the lead agent.

Reporting what you do

Once you've set up your plans and conducted your program, activity, or event, you are then required to report it on the Texas Data system. Remember that anything you report on Texas Data must have documentation on file in the county office that supports what you are reporting online. There is narrative reporting and there is reporting of numbers. Each is important.

Fundamentals of County 4-H Program Management

Meeting Club Managers

Club Managers are volunteers who provide leadership for the management of 4-H clubs and their projects. They are key stakeholders in our 4-H program and are volunteers you need to get to know and support because they provide a valuable service. Meet them, find out what they need, and work to support them and encourage them. They are absolutely critical to the operations of our 4-H club program.

Attending 4-H Club meetings

As a new agent, you should attend each club meeting in your county to meet the 4-H members, their parents, project leaders, volunteers, and supporters. You need to know them and they need to know you. It's not necessarily required for you to attend all club meetings each month but your attendance and appearance regularly at 4-H meetings, especially while you are new to the county, are critical to building trust and respect between yourself and our clientele, both youth and adults. It shows that you care, which is a key ingredient in developing trust.

Supporting county-level 4-H groups

Your county should have some level of county-level 4-H groups. These could include your County 4-H Council, and adult leaders/volunteer organization, 4-H ambassadors, or possibly project or leadership groups organized at the county level. You are responsible for serving as an advisor to these groups and/or working closely with volunteers who provide leadership and guidance to these groups. These are groups that represent your county at the district and state level or within the community as a whole.

4-H Connect

4-H Connect is an online registration system that allows youth to enroll in 4-H clubs, adults to apply for volunteer status, and allows both youth and adults to register for 4-H events. This system also functions as a vehicle for collecting payments and fees and is managed at the county level by the agents or their designees. The program has many management features that allow you to use the information entered by members and volunteers to better manage the program. When you start, you will need to set up your profile on 4-H Connect. Contact a mentor or your 4-H specialist to learn how to do this.

Chartering Process

Every year, 4-H members must be renewed, and 4-H clubs must apply for status as a 4-H club. This is referred to as the chartering process and requires that clubs meet certain requirements as a condition for use of the 4-H program and emblem. Agents must review their applications and are responsible for the review and approval process. Details about this process can be found on the 4-H website. Like most other things, consult the 4-H specialist or a 4-H agent on your mentor team for support and guidance.

Youth Protection Standards

The program we refer to as “Youth Protection Standards” is the process by which we ensure that each person who applies for status as a volunteer who wishes to work directly with youth is appropriately screened for any criminal history. The protection of our youth is important, and standards have been set for any person who wishes to work directly with youth as a volunteer. This not only applies to volunteers in the club-based 4-H program but also to Master Gardeners, Master Naturalists, or any other volunteer who works directly with youth through any AgriLife Extension program.

Best Management Practices

Best Management Practices in financial management are the recommended procedures we promote to all external support groups who raise, hold, and expend funds in the name of AgriLife Extension or any of its programs or volunteer groups. As an agent, you are responsible for knowing these practices, for providing training to these groups, and for providing oversight to support groups with regard to the manner in which they handle money. The money does not belong to Extension, but we have a vested interest in providing reasonable efforts to ensure that money raised, managed, and spent in the name of Extension is done in a manner that is lawful and ethical and brings favor upon the agency and benefits the people we serve.

Types of 4-H Enrollment

4-H enrollment comes in a variety of ways. First, we have a club-based program that enrolls youth in a community, school-based, project club or special interest (SPIN) club. Secondly, we have special interest groups that participate in a project or activity but are not formally enrolled in a club. Finally, we have curriculum-based programs that are generally school-based and engage youth in short term learning activities tied to a structured curriculum. Each county is responsible for actively promoting 4-H enrollment in their county and growing youth enrollment in all these types of enrollment venues. Agents are also responsible for tracking enrollment and reporting it annually. Contact your 4-H specialist if you have questions about enrollment.

County & District 4-H Calendars

Each county should have a 4-H Calendar that lists all activities and opportunities for youth during a given calendar year. This calendar may be published monthly but should provide adequate notice to 4-H members and parents about upcoming programs and activities in a way that encourages and supports participation. A District 4-H Calendar is published annually with dates that are set a year in advance. This is done to facilitate planning at the county level. Contact your 4-H specialist for a district 4-H calendar.

Texas 4-H Rules & Guidelines

If you have any amount of 4-H responsibilities, it will be critical for you to quickly learn the various rules associated with the Texas 4-H Program. Your 4-H specialist will share these with you during an orientation and provide you with direction on where to go when you have a question.

Roles of Agents in Support of County 4-H program

The 4-H program is one of the core programs within Texas A&M AgriLife Extension and it's a program that each employee has some level of responsibility for supporting. While 4-H agents may have 100% of their time devoted to 4-H, all agents should have some amount of time assigned to youth development through the club program, school gardens/JMG, school curriculum programs, or county, district, or state 4-H events. Support of the 4-H program is everyone's job.

Volunteer Development

Volunteers are critical to AgriLife Extension's program delivery. While we are all hired as educators, the extent to which we can successfully recruit, train, and manage volunteers is key to our ability to be effective in extending the reach of our programs. Agents must not only be effective educators but also effective volunteer managers. You will get numerous opportunities to learn more about this and strategies to develop volunteerism in your county.

Professionalism

How your performance is measured

Agent performance is measured through the performance appraisal system. This is an instrument that breaks down the various domains deemed critical to effective performance. They include educational effectiveness and quality, program resources, teamwork, and professional development. As a new agent, your progress will be reviewed at 3 months, 6 months, and then again annually thereafter. An informal mid-year review is also conducted to measure progress during the year. Extension uses performance measures as a basis for merit-based salary increases when they are approved by the Director and the Board of Regents.

Advancing in your career?

Extension is a rewarding career that carries with it an affiliation with the Texas A&M University System and a variety of work environments, program areas, and a landscape that covers the entire State of Texas. Beyond the various jobs available, we also have a career ladder system that provides salary increases to agents when they advance through the system. This system is a peer review system that advances and rewards agents throughout their career as they achieve milestones in the established performance domain areas. There are four levels and an annual training is provided in each region. There are also written guidelines that are available online and a copy of these guidelines are provided in your onboarding notebook.

Expectations for Dress & Conduct

In general, Extension Agents are expected to dress and conduct themselves in a manner that brings favor upon the agency and the Texas A&M System. Standards vary depending on the setting and the nature of the work to be done. Below are general guidelines for dress and should be applied to the situation. Dress at the county office should be business casual.

Business Professional

For Men

- Business suit with collared shirt
- Nice slacks or pressed khaki pants with collared shirt
- Sports coat or jacket & tie (can always be removed)
- Leather shoes/boots with matching belt

For Women

- Business suit or Dress
- Slacks or skirt with blazer/blouse
- Belt to match shoes
- Leather flats, low-heeled shoes or dressy boots

Business Casual Attire

For Men

- Nice slacks or pressed khaki pants
- Collared shirt or polo/golf shirt
- Sports Jacket
- Leather shoes/boots with matching belt

For Women

- Slacks or skirt with blazer/blouse
- Belt to match shoes
- Leather flats, low-heeled shoes or dressy boots

Casual Attire

For Men

- Pressed Khaki pants or clean, pressed jeans
- Collared shirt or polo/golf shirt
- Casual shoes or boots

For Women

- Cotton pants, Capri pants, or Jumpers
- Cotton blouse
- Casual shoes or boots

A few thoughts on dress:

1. Dress one notch better than your audience.
2. There is no good reason for wearing shabby, soiled, out-of-date, or untidy clothes.
3. Nice, comfortable, and professional looking clothes are generally not any more expensive than the kind that doesn't project a professional appearance.

Joining Professional Associations

Texas A&M AgriLife supports a variety of professional associations. They include the Texas County Agricultural Agents Association (TCAAA), the Texas Extension Association for Family & Consumer Sciences (TEAFCS), the Texas Association for Extension 4-H Agents (TAE4HA), and Epsilon Sigma Phi (ESP), which is an honorary association of Extension professionals that is open to Extension faculty members at all levels. Each association has a national affiliate, and each has by-laws that govern membership and participation. Membership fees vary but many counties allow you to budget funds for membership in at least one association. Professional affiliation with these associations is critical to your professional growth and advancement in the organization. If funds aren't provided by the county or not in a sufficient amount, agents should consider it a personal investment to join at least one of these associations and actively participate in the many opportunities they provide for recognition, development, and advancement in an Extension career.

Basic Office Operations

These guidelines are intended to tailor policies and procedures from both the County and Texas A&M AgriLife Extension Service/TAMUS into clear procedural standards for a given County Office. They are not intended nor, should they be interpreted to replace or supersede the established rules, policies, procedures, or guidelines of either organization. If you encounter different rules, you should adhere to the more stringent rule or clarify the proper course of action with the County Coordinator or your supervisor. Consult your County Policy Handbook or TAMUS Policies and Procedures Manual for further information and clarification.

Customer Service

Our customers are the public whether they access us by phone, fax, mail, internet, or walk-in. They are always to be greeted with respect and with special attention paid to their needs. They're the reason we are here! Our phone greeting is: "Texas A&M AgriLife Extension Service, ____ County, this is (your name)...may I help you." All efforts should be made to answer calls on the first ring and you should end all phone calls with "Goodbye", "Thank you for calling", "Please call again" or similar professional business ending to a call. No collect, person to person, or other calls billed to Extension are accepted. Walk-ins should be assisted within 1 minute and should be referred to appropriate faculty member within 5 minutes if no appointment has been made.

Standards for Answering the Phone

1. Phone should be answered promptly (first ring, never after the third).
2. "Texas A&M AgriLife Extension Service, _____ County, this is (your name)" is the official greeting that must be used.
3. When calls are received,
 - contact should be made with the staff person before the call is transferred
 - if contact cannot be made, the caller should be told the person is "away from their work station" and a detailed, written message taken and provided to the agent.
 - no person shall be left on hold for more an extended period of time.

Taking Messages

When taking messages, you are expected to document the full name of the caller, return phone number, time & date of call, full address if pertinent to the call, and detailed notes about the purpose of the call. Incomplete or inaccurate messages result in dissatisfied customers and poor-quality service.

Additionally, take the time to learn the names of key local leaders and program area committee members, media, county officials, state officials, Extension specialists and administrators, and other key people. Agents should inform their support staff about the people for which they wish to be interrupted. Please afford these individuals the consideration they deserve by offering to check with agents before taking a message or making extra efforts to locate agents who are away from their desks. County commissioners, media representatives, state elected officials, and state administrators should be given top priority and full service.

Referrals

All walk-in traffic should be served immediately and be provided with a comfortable place to be seated while an agent is contacted to serve them. You may also ask the person if they had an appointment so that you can provide this information to the agent. Please make every effort to ensure that walk-ins receive attention from a professional faculty member as appropriate. Agents should make walk-in customers a high priority and attend to them as quickly as possible. Phone inquiries should be directed to the agent once the general nature of the question is established. This is to minimize inaccurate referrals. Under no circumstances should a caller be transferred to a voice mailbox without the caller being given that option (example: "Mr. X is not in...may I take a message or would you like his voice mail"). Be aware that agents may provide a special method in which they would like calls directed. This should be honored and followed.

Long Distance Calls

County Offices may have special codes or instructions for long distance calls. Verify county policy for long distance calls and other phone use policies. Personal phone calls, even those taken on personal cell phones, are generally permitted but should be kept under 2 minutes and be kept to a minimum during a given business day. No personal phone calls should be made if they will result in costs to the county or state (i.e. long-distance charges billed to the county/state, collect calls, time spent on the phone that exceeds reasonable limits).

Agent Duties Outside the Office

Agents are considered to be on duty during posted office hours. It is the responsibility of the agent to advise the office support staff of their whereabouts during office hours and provide an estimated time of return, updating that time as needed. It is the responsibility of the office support staff to make reasonable efforts to maintain the whereabouts of the agent along with an estimated time of return. This information is important when handling phone inquiries, walk-ins, and to designate where you may be located, including leave taken. A message board is recommended to advise internal staff that the agent is "at a meeting," "conducting a workshop," "away from his/her desk," "out," or other appropriate reference. Each person, both agents and support staff, is individually responsible for ensuring that an agent's duties outside the office can be reasonably accounted for during business hours. If agents are on leave, that should be indicated along with the date the agent can be expected to return to work. Office support staff should NOT say "I don't know," "that agent hasn't come in yet," "gone for the day," etc.

Mailing

A postage budget is provided by the District office through budgeted state funds. Funds are charged on an online account and may be used to mail business mail as needed. Overnight mail services may be supported at county expense. This should be verified with the county coordinator, county auditor, or other responsible person.

Recurring Reports

All agent monthly reports are due on the 5th work day of the month following the reporting period or the 7th of the month, **whichever comes FIRST**. A complete monthly report includes a completed Texas Data report, a written commissioners' court report (D-843), a monthly schedule of travel (D-360), and office conference minutes. The D-843 & D-360 are submitted monthly to all members of the court. These two report AND office conference minutes are submitted to the District Office. Other reports are due throughout the year and should be submitted as directed by the DEA or RPL.

Dress Code

Dress should be consistent with the job responsibilities. Office support staff shall dress in a manner consistent with a professional office environment. If a “casual day” is designated, it should be consistent with standards of office dress for other county departments. Agents should always dress professionally and in accordance with their duties for the day. Business dress is recommended for Commissioners Court appearances, conferences, and similar activities. If in doubt, consult your supervisor.

Office Hours

The County Office should have posted office hours from 8 am to 5 pm unless the county sets different hours for county offices. Our office should be open at all times during these posted work hours. Office support staff shall be provided with a lunch hour from 12:00 pm to 1:00 pm. Given that most offices have only one support person, they should coordinate with the agent if they feel they need a break, but breaks are not required to be provided.

Opening & Closing

Unless alternative arrangements are made, it is the responsibility of office support staff to open the office and prepare it for the business day. Similarly, closing procedures should ensure that the office is safe and secure. This includes ensuring that all equipment not being used is turned off, all doors are locked, break/meeting rooms are clean and picked up, and that lights (except security lights) are off. A check for general hazards should also be conducted to ensure that appliances are unplugged as appropriate, that water isn't running in the bathrooms, and other potential hazards are eliminated or identified and reported if safety is an issue.

Work Week

The standard work week for office support staff shall consist of 40 hours for full time employees. The county may have a different work week than the state. The work week for state wage employees is Monday through Friday. Program support staff, including program assistants with BLT and EFNEP shall work not more than 40 hours per week, using a standard 8am to 5pm schedule or other set schedule as requested by the supervising agent. Part-time staff work hours shall be determined by the supervising agent.

Holiday Schedules

The county office is closed on all days observed as holidays by the County. If the State of Texas provides for more holidays than the County, agents will be provided with added floating holidays. County Coordinators are responsible for submitting a county holiday schedule in advance of the upcoming fiscal year and then adjusting that schedule once commissioners' court approves the final county holiday schedule. If the county holidays exceed the number of state-authorized holidays, agents must either take leave on the number of excess days or request and gain administrative approval (in advance) to work selected holidays.

Office Conferences

Office conferences should be held if there are two or more people on staff, including all support staff. Conferences are recommended to be held weekly. Attendance is required of all agents and support

staff. Written minutes should be prepared and filed. They should be submitted to the district office monthly with commissioners' court reports.

Use of Motor Vehicles

All agents must have a vehicle for business use as a requirement of employment. Selected program support staff may also be required to use their personal vehicle for official duties as determined by job responsibilities. Job responsibilities for office support staff shall not require travel and they may not travel except with special permission. Office support staff may decline to use their own vehicles for county or Extension business without fear of reprimand or reprisal. Any vehicle driven in support of official business, whether compensated or uncompensated, must be driven by a licensed operator and must have liability insurance that satisfies state law. State or county-owned vehicles should be used in accordance with applicable state or county policy. Unless expressly allowed, official vehicles should not be taken home or used for any non-business purpose.

Filing and Document Storage

A central file should be kept in each county office to retain copies of documents and reports. With the exception of HR or confidential files, these files should be kept in a location that is accessible to all faculty and staff and should house all administrative files along with subject matter publications. Agents may retain personal program files or working files, but personal files should not be considered to be official agency files. All work files, regardless whether they are printed or electronic and regardless of where they are kept, remain the property of the State of Texas.

File Retention

County offices should follow county policy for county records and state policy for state records. In the absence of a county policy, state policy should be used for guidance. Guidance for record retention related to monthly reports, personnel files, civil rights files, subject matter publications, and other documents can be obtained from the district office. File retention does not apply to an agent's personal files.

Open Records/Freedom of Information Act

With few exceptions, any document or record in a county office is subject to the Open Records Act. This includes all files on computers owned by the state or county and includes all contents of those computers whether public or private. This could also include work documents kept at home. Contact the district office immediately if such a request is made.

Communication with Elected Officials

Communication with county elected officials that are initiated by Extension should be done with prior full knowledge and consent of the county coordinator. When communication is done with state or federal elected officials, the DEA should be advised in addition to the county coordinator.

Human Resource Management

Classification of Employees

All agents are defined as “Salary-exempt” employees according to the Fair Labor Standards Act. By this exemption, they are ineligible for overtime, compensatory time, or other standards affecting wage employees. They are required to adhere to the standard office work hours of 8 am to 5 pm. All office and program support staff are defined as “Salary-Non-Exempt” employees and are affected by the rules set by the Fair Labor Standards Act. If you don’t know how your position is classified, ask the agent or county coordinator.

Salary & Benefits

Full county employees qualify for full county benefits and are paid based on the established county payroll schedule. Agents with blended positions (county & state) will receive the county and state portions of their salary separately based on the payroll schedule for each entity. State payroll for salary employees is paid on the 1st work day following the pay period. Agents receive state health benefits. The provision of health benefits from the county is at the discretion of the county. Retirement benefits must be coordinated between the county and state and may vary based on the type of the retirement plan. When agents are new, they should check their pay stubs to ensure proper deductions are being made and report errors to the appropriate person at the county or state, depending on where the suspected error has occurred.

Payroll & HR

- Agents are paid monthly, on the first working day of the month following the month of service.
- Single Sign-On (SSO) is the gateway for the following online programs:
 - Concur Online travel requests and expense reports for state paid travel
 - TrainTraq Required training portal for state employees
 - WorkDay Online human resources management system
 - Personal Information – including your emergency contact info
 - Pay – Pay slips, direct deposit and withholding elections, w-2s
 - Time Off – leave requests and balances
 - Time – reporting of time sheets / approval for *hourly* paid personnel
 - Benefits – Enrollment, annual enrollment, benefit statements
 - Career – Performance evaluations, job descriptions, career opportunities

Time Sheets

All non-exempt employees are required to maintain a daily record of hours worked through the use of a time clock or other accepted method as approved by county coordinator. Hours worked and time off must be recorded on appropriate county payroll forms by all employees, with employee signature for each payroll period. Payroll should not be altered or reported incompletely or incorrectly and should not be submitted for employees who do not record hours, sign, or otherwise fail to follow county policy for payroll records. Agents should follow county policy or seek exemption or other court order that provides guidance for this process.

Overtime/Compensatory Time

Counties generally do not provide budgeted funds for overtime pay. No compensatory time will be allowed as a standard practice. Agents should ensure that work is provided to support staff with sufficient lead time and in a manner that allows for it to be completed during normal working hours. Agents are not authorized to alter the standard work hours set for the office.

Holidays

- CEAs will follow the holiday schedule observed by the county where CEA is headquartered.
- County holidays are compared to the number of state holidays each **fiscal** year (9/1-8/31). CEAs are state employees, and therefore have the same number of holidays as state employees each year (as approved by the state legislature).
- If a county observes **fewer** holidays than the state, then CEAs are given state floating holidays to compensate for the difference in the number of county vs. state employees. State floating holidays can be used at any time by CEA, with supervisor approval. To request time off for state floating holidays, enter a request in Workday using leave type floating state holiday.
- If a county observes **more** holidays than the state, then each CEA may:
 - Work one or more county holidays to make up for the extra county holidays; or
 - If CEA wants to observe all county holidays, then CEA will need to take vacation leave for those days observed by the county that are over the number of holidays approved by the state legislature in any given fiscal year.
- In August of each year, all County Coordinators will be asked to report the **anticipated** county holidays to be observed between 9/1 and 8/31 of the new fiscal year. The holiday schedules will be entered in an online system. In December when the County Commissioners Courts actually approve the new holiday schedule for the coming calendar year, the actual holidays should be compared to the anticipated holidays. If the actual holidays differ from the anticipated holidays, any variances should be reported to the District Office Manager.
- All state floating holiday hours must be used before 8/31 of each fiscal year, or they will not carry forward to the new fiscal year on 9/1 and will be forfeited.
- If CEA is required to work a scheduled county holiday due to a scheduled program, stock show, or other job responsibility:
 - Prior approval must be granted by DEA to work a scheduled county holiday (send email request to DEA and copy District Office Manager).
 - After the scheduled county holiday has been worked, CEA should provide documentation to District Office Manager such as agendas and sign-in sheets from the event.
 - District Office Manager will post the appropriate state comp time earned to CEA's leave balances in LeaveTraq.
 - CEA must use the earned state comp time within one year of the date the leave was earned.

Sick and Vacation Leave

Sick leave and Vacation leave may be taken when eligible and in accordance with policy, as an accrued benefit. When sick, office support staff should personally and directly contact the agent to notify them of the nature of their illness and the number of hours that will be taken. This should be done in a manner that assures that neither office operations nor programs/services are unreasonably impacted negatively. Vacation leave should be requested in advance, preferably with 2 weeks' notice. Failure to provide due notice for leave may result in denial or delays to ensure that the office can operate effectively for the period in question. Workday – Time Off is the official system for reporting time off for state employees. County employees should follow county leave procedures. Please refer to state/county guidelines for specific rules on sick/vacation leave benefits. Leave is a request process, not a notification process.

Job Descriptions

Job descriptions should be developed for all positions and be reviewed and signed annually. All agents and program support staff shall sign and submit a job description for the file at the time of employment. This is a requirement for all positions, regardless of funding source. Support staff should review and approve a paper copy annually during their performance review.

Supervision & Evaluation

County Extension Faculty are supervised and evaluated by the District Extension Administrator. They are also accountable to the Commissioners' Court. Office support staff provide administrative support to agents and should be evaluated annually. The County Coordinator is responsible for facilitating this process in a manner that assures full faculty input. Program support staff should also be evaluated annually by their supervising agent with input from the county coordinator. Standard evaluation forms are available on the human resource website and should be used for all support staff. This also applies to county-funded positions unless the county has and requires the use of their own instrument.

Disciplinary Action

Disciplinary action for county staff follows county policy for discipline and dismissal. Progressive discipline may include any of the following actions: verbal warning, written reprimand, suspension, demotion, and/or dismissal. A written warning should precede any action related to suspension, demotion, or dismissal. TAMU System & AgriLife Extension policy shall be followed for all state employees.

Civil Rights/Affirmative Action

A number of laws, USDA directives, and System Policy govern issues related to civil rights and affirmative action. The reason these rules were created was to ensure that Extension programs and services are open and available to all persons regardless of race, color, sex, disability, religion, age, or national origin. These rules also prohibit discrimination in employment. Every reasonable effort must be made to make all people in the county aware of Extension programs and all people should be served in a non-discriminatory manner. This is also an expectation in the workplace. Documents that support efforts in support of non-discrimination should be kept on file and updated annually to use during state civil rights reviews. Each county is subject to federal or state reviews of compliance with Civil Rights laws. For further information on EEO laws and civil rights policy, county employees should refer to county policy and state employees should reference the TAMUS Administrative Policies website.

Budget Management & Inventory Controls

Travel Requests / Authorization - Concur

Requests for travel involve approval for two things: time (administrative approval) and money (PO or court approval). Sometimes those are accomplished in one action and sometimes they require two separate requests, depending on the source of travel funds. Administrative approval is necessary to protect the agent while traveling outside their assigned county.

- All Travel Requests must be submitted through Concur (state online travel system) via Single Sign-On) using the Travel Request option designating the funding source and routed electronically for appropriate approval by DEA prior to the date of the trip.
- Always have an approved Travel Request before departing headquarters.
- There is no approval required from the DEA or County Commissioners' Court for **local in-county travel**.
- An annual Blanket Travel Authorization letter (based on a fiscal year) is provided for all agents for Extension related business travel **within District 12**.
- Traveling on **state funds** – Any travel to be paid from Extension/state funds must be submitted and routed completely through Concur as well as based on administrative directives for the given account. Always include the department and account number to be charged so DEA is notified of the funding source.
- Traveling on **county funds** – Travel to be paid from county funds, must be submitted and routed completely through Concur, be sure to type “FUNDING SOURCE-COUNTY FUNDS” in the comments/notes section of the request header. Note: A request for travel funds must also be made to the county which usually involves an agenda item, although county policies may vary.
- **Out of District 12** – complete a Travel Request in Concur for any Extension-related travel that takes you out of the district. Request must be submitted in advance of your trip for DEA approval.
- **Out of State or Out of Country** - complete a Travel Request in Concur for any Extension-related travel that takes you out of the State of Texas or out of the U.S. These requests must be always be submitted **30 days in advance** of your trip for DEA and County Operations approval.
- Failure to obtain appropriate pre-approvals in a timely manner will result in denial of authorization to travel. Agents may use annual leave to travel but will not have the protections in place if they were on official time.
- Work with District Office Manager for all travel using state funds. Particular rules may apply.
- If you will be traveling extensively, visit with District Office Manager about obtaining a state travel credit card.
- Travel Expense Reports for travel to be paid with state funds are submitted through Concur after your trip for reimbursement.

Travel Reimbursement - Concur

- Concur is the online travel system for employees traveling on **State or Extension** local funds. (This is not your county travel as that goes through the county for reimbursement.) Concur will be used when you turn in First Step mileage and if you have any fund accounts such as Food Protection Management (FPM), TDA, etc. and wish to use them for travel reimbursement.
- You will need to go to Concur and set up your profile (if you have not done so already).
- You do not have to enter a credit card if you are just submitting for First Step mileage reimbursement. You may wish to apply for a credit card for future use if you expect to travel on State funds often enough to justify one, otherwise you may use your personal credit card.
- Helpful online training videos and snippets are available to help you navigate Concur.
<http://agrillifeas.tamu.edu/fiscal/travel/index.php>
- The travel forms website is located at <http://agrillifeas.tamu.edu/forms/travel/index.php> where you will find credit card applications, the AG-808 Mileage Log (to use for First Step), and other travel information.
- You have two options for recording mileage:
 - Mileage Log - Be sure to keep the odometer readings daily per trip and include exact addresses as this is important for audit purposes. When you create the expense report, be sure and add a note in the comment area "mileage log attached." Submit by scanning and attaching to the Concur travel expense report.
 - Concur Mileage Calculator – link is located under new expense personal mileage section and resembles Google maps where you will enter your point to point trip info in Concur to calculate mileage used. **The mileage calculator is the preferred method is to use when reporting personal mileage within Concur.**
- For First Step Travel you will receive a travel authorization letter with the account information to put in Concur from County Operations. This approval will be for mileage only, no meals or lodging will be covered. Your First Step travel expense report is due at the end of your first month where you must attach the authorization letter received.
- You must have authorization for all official Extension related business travel which you conduct, covered in previous section titled "Travel Requests".
- Sign up for **DIRECT DEPOSIT of purchase and travel reimbursements** from State funds via Workday by going to the PAY worklet, selecting Payment Elections and adding your direct deposit information under the Expense Pay Type.

In County Mileage – County Funds

Reimbursement for local mileage from county funds is handled through a mileage reimbursement process or by a travel allowance. Mileage reimbursements require a record of miles traveled and are reimbursed at the approved rate by the county. These reports should be submitted monthly and not saved up. Mileage should stay within budgeted amounts. Travel allowances are usually processed through payroll and are reported as income. No mileage support documentation is required but travel allowances should be justifiable for the amount of mileage traveled locally and miles traveled must still be reported monthly using the D-360. In the case of personal vehicles used for business purposes, agents may receive mileage reimbursement, OR a monthly allowance as approved by the court, **not both**. Agents are ineligible for an allowance if they are provided with a county vehicle.

Out of County Travel – County Funds

- All county policy should be followed in seeking authorization and/or reimbursement for out of county travel expenses.
- Where allowances are provided for per diem, efforts should be made to economize on per diem. (i.e. do not claim full per diem if meals and/or lodging is provided)
Travel budget requests must be supported by justification and approved by DEA prior to submission to the county.
- Travel expenditures must remain within the approved budget. No requests for additional travel funds should be made to the county without advanced approval by the DEA and appropriate justification.

Use of County Vehicles

- Agents who receive an allowance should NOT use a county vehicle for travel associated with that allowance (usually in-county travel).
Exception: written policy allowing this based on a special circumstance.
- County policy should be requested and followed for all county vehicles assigned to Extension.
- A record of mileage should be kept for all county vehicles to support the nature of their use in support of Extension business.
- Uses of county vehicles that are discouraged include but may not be limited to the following:
 - Taking vehicle home
 - Transportation of family members
 - Use of vehicle for personal travel or travel unrelated to county business
 - Uses that violate state law or county policy
- In the absence of a county policy, a court order should be sought that requests and gains court approval for any use of the vehicle that is customarily discouraged or prohibited.
- Vehicles should be driven and cared for in a manner consistent with property held in public trust. (i.e. follow traffic laws, keep vehicle clean inside & out, be courteous, etc.)

Ordering Supplies & Equipment

General office supplies should always be well stocked and in a single storage area accessible to all staff. Staff members should only take what they will reasonably use. Supplies are for business purposes only. Records may be kept for certain items to monitor use for budgeting and management purposes. General office supplies should include paper, copier supplies, writing tablets, pens, pencils, paper clips, folders, rubber bands, and other supplies as requested by staff. The office manager or a designated office support person is generally responsible for ordering supplies with guidance/direction from the county coordinator and with agent input. Agents and support staff should notify that individual if a specific supply item is running low.

Special Program Supplies

Certain programs such as BLT, and other state or grant programs may have budgeted funds for supplies and equipment. As such, these programs may have individual accounting requirements or limitations on uses that should be recognized and honored. However, it is an expectation that seamless use of resources is practiced while honoring the requirements of a given special program.

Equipment/Inventory

The County Coordinator is the Accountable Property Officer (APO) for all county and state equipment. All equipment should be stored in an accessible but secure area, preferably with a lock. A “check-out” system is encouraged if there are multiple users. State and county equipment should only be used for official Extension or county business. Non-business uses are prohibited. Any problems (burned out bulbs, missing cords, etc.) should be reported to the office manager or designated office support person upon return of the equipment. Except for programs or other business uses, all equipment must remain in the office. Equipment should not be routinely stored/used at home, in a vehicle, or other unofficial location without a filed form (AG-311 Property Used Away from Assigned Location) that documents this and provides a justification about how such an arrangement is in the best interest of the state or county. A history of lost or damaged equipment may result in the revocation of such a privilege. Equipment inventory is conducted annually by the state and must be verified by the APO. A separate inventory should be kept for county equipment/property. If the county has no inventory process, we recommend that county equipment be accounted for and visually verified annually as well through a county inventory list.

Surplus

To transfer your inventory assets to surplus or otherwise removing assets from your inventory, contact the District Office for appropriate process prior to transfer. For more information, visit: <https://agrifecdn.tamu.edu/southtexas/files/2016/05/Options-for-Removing-office-computers1.pdf>

Grant/Program Funds

State-controlled funds must be managed by the designated Principal Investigator (P.I.) for the grant and must be done in a manner that honors and follows agency policy and established fund management procedures and guidelines. External support accounts should follow agency recommendations with the assigned agent being responsible for providing training to volunteers as appropriate.

Use of Vendor Accounts

Accounts may be set up in the name of the County or the State ONLY with expressed written consent from the appropriate fiscal officer. Accounts carry considerable restrictions and accountability for their use. These may only be used for business purposes, only with state or county funds, as appropriate, and in accordance with AgriLife Extension or County fiscal policy.

Support Group Accounts

External accounts may exist and serve a valuable role in supporting Extension programs. These could include 4-H Clubs, TEEA, Master Gardeners, Master Naturalists, Ag. Committees, Advisory groups, or others. These funds belong to these groups, not to Extension or the County. As such, agents may not handle any money that is not county or state money, except as outlined in agency policy. Strict procedures for the handling of money is outlined in Extension’s “Best Practices: Financial Management Procedures” document. All volunteers, agents, and support staff are required to receive training in this area.

County Budget Development

County Budgets are developed annually based on the fiscal year of the county. The county coordinator is responsible for coordinating the development of a county budget request with input from all county faculty and with consideration of support staff needs. Details for this process are outlined annually in budget development instructions provided to the county coordinator. All budgets must be submitted and approved by the district office prior to submission to the county.

Fee Based Programs

Many Extension programs are fee-based and carry a requirement for the collection of fees that must be submitted to the state office. Examples of this are 4-H participation fees, soil and water testing fees, and program registration fees. Some of these fees are collected by the agent and submitted while others are paid directly by the client. See the district website for more information on this.

Resources

Below are resources provided to you in your onboarding notebook. These files are contents on a USB drive and may be accessed online using the link below.

- Associations and Publications
- Agent Onboarding
 - Mentor Guidelines
 - Onboarding Articles
 - Agent Onboarding Resources
 - Onboarding Strategy Flyer
 - First Step Journal
 - New Agent Study Guide
 - Mentoring in Extension
 - New CEA Note Pages
 - Additional Resources
 - Texas A&M AgriLife Extension Service Brand Store
 - Ag Communications resources (logos, branding, business cards, etc.)
 - FirstCall (IT help desk support)
 - Extension personnel directory—online printable directory
 - AgriLife People online directory
 - Required IT procedures
 - Mileage log (to be used as tool for First Step reimbursement through Concur)
 - Partial Cost Recovery resources
 - Best Practices for Financial Resource Management
- Timeline Flow Charts
 - First Step Flowchart
 - Month 1 Flowchart
 - Months 2-5 Flowchart
 - Months 6-12 Flowchart
 - Year 2 Flowchart
- Online Resources (links to online courses)
- Career Ladder and Performance Appraisal
- Degree Information

<http://agrilife.org/od/employee-development/extension-onboarding>

(Shortcut URL: onboarding.tamu.edu)

DESCRIPTION	WEB ADDRESS
Agriculture and Natural Resources (ANR)	https://agriflifeextension.tamu.edu/browse/program-areas/
AgriLife Bookstore	https://www.agrilifebookstore.org/
AgriLife Extension	http://agriflifeextension.tamu.edu/
AgriLife Extension Employee Site	http://extensionemployees.tamu.edu/
AgriLife Administrative Services	http://agriflifeas.tamu.edu/
AgriLife Information Technology	http://agriflife.org/it/
AgriLife People	https://agriflifepeople.tamu.edu/
Better Living for Texans (BLT)	http://blt.tamu.edu/
Branding	http://agriflife.org/communications/resources/extension/
Business Cards	http://agriflife.org/communications/resources/extension/stationery/
Career Ladder	https://countyprograms.tamu.edu/county-operations-administration/
Certificate of Expenditure	https://countyprograms.tamu.edu/county-operations-administration/
City/County Information (Online Highways)	http://www.ohwy.com/
Civil Rights Compliance	https://agriflifeas.tamu.edu/hr/diversity/
Concur eTravel Training and Resources	http://www.tamus.edu/offices/travel/concur-on-line-training/
Conference Services	https://agrifliferegister.tamu.edu/
Cost Share Technology Program/Order Form	http://agriflife.org/it/services/
County Operations Administration	https://countyprograms.tamu.edu/county-operations-administration/
Customer Satisfaction Forms	http://agriflife.org/od/evaluation/customer-satisfaction-program/required-counties/
Dossier Template	https://countyprograms.tamu.edu/county-operations-administration/

DESCRIPTION	WEB ADDRESS
Extension Disaster Education Network (EDEN)	http://texashelp.tamu.edu/employee/agent-login.php User name: [CountyName] Password: [CountyZipCode]
Emergency Management	http://agrillife.org/od/emergency-management/
Envelopes	https://www.agrillifebookstore.org/
eXtension	http://agrillife.org/od/elearning/extension/
Family and Community Health (FCH)	http://fch.tamu.edu
Fee Based Program Resources	https://agrilfeas.tamu.edu/fiscal/fiscal-banking-and-receivables/ext-fee-based-program/
Financial Resource Management Manual	https://agrilfeas.tamu.edu/fiscal/fiscal-banking-and-receivables/best-practices-financial-resource-management/
FirstCall – IT Help Desk and IT Remote Assistance	http://first-call.tamu.edu/
First Step Forms and Guidelines	https://agrillife.org/od/employee-development/extension-onboarding/onboarding-notebook-draft/agent-resources/
Forms	http://agrilfeas.tamu.edu/forms/
Hotels—Contract List	https://agrilfeas.tamu.edu/fiscal/travel/
Human Resources	http://agrilfeas.tamu.edu/hr/
Job Descriptions (for Dossier) - click on title code	http://agrilfeas.tamu.edu/hr/careers-employment/current-employees/title-codes-alpha/index.php
Job Descriptions (County/4-H Coordinator)	https://countyprograms.tamu.edu/county-operations-administration/
Letterhead (electronic)	https://agrillife.org/communications/stationery/
Logos / Branding	https://agrillife.org/advancement/agrillife-branding/branding-agrillife-extension/
Marketing (folders/brochures/pens/pads)	https://www.agrillifebookstore.org/
Mentor Program	https://agrillife.org/od/employee-development/extension-onboarding/onboarding-notebook-draft/agent-resources/
Moodle Courses—eXtension eLearning	http://agrillife.org/od/elearning/moodle/

DESCRIPTION	WEB ADDRESS
New Agent Self-Study Guide	http://agrillife.org/od/employee-development/extension-onboarding/onboarding-notebook-draft/agent-resources/
Onboarding Resources for New Agents	http://agrillife.org/od/employee-development/extension-onboarding/
Onboarding Courses for New Agents	http://campus.extension.org/
Onboarding Flow Charts	http://agrillife.org/od/employee-development/extension-onboarding/flow-charts/
Outlook (Internet Email)	www.office365.com
Performance Appraisal System — CEAs	https://countyprograms.tamu.edu/county-operations-administration/
Posters (Required for Workplace)	http://agrillifeas.tamu.edu/hr/supervisor-toolkit/required-workplace-posters/index.php
Program Development	http://agrillife.org/od/program-development/
Records Retention	http://agrillifeas.tamu.edu/risk-compliance/records-mgmt/index.php
Rules & Procedures	http://agrillifeas.tamu.edu/rules-procedures/index.php
Single Sign-On	http://sso.tamu.edu
TExAS Planning and Reporting	http://agrillife.org/od/accountability/draft-texas/
Texas State Data Center	http://txsdc.utsa.edu/
Travel Resources	http://agrillifeas.tamu.edu/fiscal/travel/resources/index.php
U. S. Census Bureau (Quick Facts)	http://quickfacts.census.gov/qfd/states/48000.html
Volunteerism Resources	http://agrillife.org/od/volunteerism/
WebEx (Agrillife Online Meeting/Webinar Portal)	https://agrillife-tamu.webex.com/

Mentors & Resource People

Program Development	Specialists	Agents
ANR Committees		
FCH Committees		
Youth Boards		
Leadership Advisory Boards		
Subject Matter – Agriculture		
Vegetables, Citrus, Fruit & Nuts		
Cotton, Grain, Field Crops		
Ornamental Horticulture		
Wildlife		
Beef Cattle/Livestock		
Range & Pasture		
Aquaculture/Fisheries		
Result Demonstrations		
Entomology		
Water		
Soils		
Pesticide Education		
Master Gardeners		
Turf		
Horse		
Subject Matter – Human Sciences		
Diet & Nutrition		
Family Economics		
Food Protection Management		
Obesity		
Clothing & Textiles		
Gerontology Issues		
Housing & Home Environment		
Health & Safety		
Parenting Education		
Child Development		
BLT Management		
TEEA		
4-H Program Management		
Club Managers		
4-H Council/Youth Leadership		
Livestock Shows/Fair Boards		
Food Show/Food & Nutrition		
Fashion Show/Textiles		
Roundup Events		
Scholarships		
Shooting Sports		
Photography		
Record Books		

Mentors & Resource People

Program Development	Specialists	Agents
Horses		
Dogs		
Livestock Judging		
4-H Connect & Reports		
School Curriculum		
Community Development		
Animal Issues Committee/Plan		
Emergency Management		
Business Development		
Hospitality		
Nature Tourism		
Urban Planning/Environmental Quality		
Parks		
Organizational Support		
County Budgets		
Support Staff Supervision		
Volunteer Development		
Office Conferences		
Civil Rights		
Interpretation		
Working with Elected Officials		
Evaluation		
Web		
TEXAS		
Crop Reports		
Ag. Increment Report		
Monthly Court Reports		
Annual Reports		
Professional Development		
Performance Appraisals		
Career Ladder		
Professional Associations		
Subject Matter – ANR		
Subject Matter – FCH		
4-H Program Management		