

## General Office Operations

### Facility Usage Procedures

A written policy on use of the Extension office space, meeting room(s) and equipment is recommended. The County Extension Council and Extension District Board should be directly involved determining the policies. The following questions need to be considered:

- Who may use the meeting room?
- Who is responsible for cleanup and trash disposal?
- What is the policy on food and food preparation?
- Who handles reservations?
- Who may have a key and when may the key be picked up and returned?
- Who is responsible for security?
- What is the policy on using audio visual and other equipment?
- Are there fees for use and are there conditions for the fees?
- Is there a usage deposit to be made and agreement to be signed when the key is picked up?
- Who may use the office equipment and office space?
- Is any equipment or furnishings allowed to be borrowed and leave the office, and under what circumstance?
- [A sample meeting room usage guide is available here](#)

### Office Appearance

The county Extension office is a reflection of the University of Kentucky and the Martin Gattton College of Agriculture, Food and Environment. To establish a setting for effective Extension education, county offices should look attractive, be equipped to provide efficient and adequate service, be easily accessible, and provide a welcoming atmosphere. It is expected that the location of the office will be convenient for the clientele to be served.

### Office and Name Signs

An adequate and attractive sign(s) should be displayed outside each county Extension office and inside the building, if needed, to provide directions to the Extension reception office and/or agents' offices. All signs are to be consistent with the guidelines posted on the college [Marketing Resources web site](#). Check with Area Extension Director on office signage updates and changes.

### Office Hours

Office hours should be posted in a visible, prominent place. Office hours may vary from one county to another, depending upon the local situation, but the office hours should be regular, convenient to clientele and consistent. Recommended office hours are

8:00AM-4:30PM. Changes in office hours require the approval of the Area and Regional Extension Directors.

### **Management of County Extension Office**

Management of the office facilities can be very time-consuming. Prior to the decision to obtain better offices, agents and the County Extension Council/District Board need to discuss maintenance, use of the meeting room(s), security, cleaning, and setting up of equipment.

The more time agents spend managing the facility, the less time is available for programming. Many offices hire a facilities manager or custodian to oversee office facilities. Determining the best system for managing the facility is influenced by the following:

- Size of the facility
- Volume of community use
- County budget

Some options that can be considered by the staff and the Extension District Board are:

- Hire part-time custodians or contract for custodians to be available during evening hours. Job descriptions can include setting up tables and chairs, setting up audio visual equipment, clean up after meetings, and providing security after office hours.
- Employ a facilities manager with duties to include some maintenance as well as the jobs listed above. The facilities manager position can also supervise custodial staff as needed.

If the county decides to hire additional office help, the following are considerations should be made:

- Develop a list of jobs that need to be done. All agents discuss what is needed.
- Anyone employed must be on the University of Kentucky payroll unless they are contract labor.
- If the work is contracted, then the agency or individual doing the work must provide own supplies, along with liability and workers' comp insurance.
- A written agreement should be made with any work that is contracted.
- Anyone employed, regardless of source of funds, must comply with U.K. employment policies and procedures.

If county budgets do not permit hiring additional staff, other options can be considered:

- Charging fees for use of the meeting room will help offset expenses.
- Each group using the facility can be responsible for setup, arrangement, and clean up.

### **Control of the Office Keys**

Maintaining security in the County Extension Office is crucial to ensuring the safety of equipment and confidentiality of information. Restricting the number of keys in circulation is vital to this security. The following procedures will help:

1. All employees can be issued keys to the office.
2. All other users of facilities should follow Extension District Board guidelines for meeting room usage, signing out and returning keys.

3. Involve the Extension District Board in developing the policy concerning loaning keys.
4. If possible, meeting rooms should be separated from the office area by a locked door.
5. Meeting room key should be different from the key(s) to the agents' offices and secretarial area. Do not check out a "master key" to anyone. Limit the number of keys that are available to loan.
6. Meeting room keys should be signed for with no exceptions.
7. One staff assistant should be designated to keep record of checked-out and returned keys.
8. Keys should be stored in a designated locked location in the office.
9. If keys are not returned it may be necessary to change locks.
10. Collect keys from employees as they leave employment. If the keys are not returned, locks should be changed.
11. Keys to the extension office can be stamped with instructions "Do Not Duplicate." Most people who make keys will honor this instruction.

## **Office Staff Assistants**

### [Extension New Staff Orientation Packet](#)

#### Management of Telephone:

1. Speak clearly, slowly, and distinctly.
2. When answering the office phone, it is recommended to say, "Cooperative Extension, \_\_\_\_\_ County Office, \_\_\_\_\_ speaking." This applies to all staff assistants and agents.
3. Placing client on hold - When you must leave the line to obtain information, it is courteous to give the caller the option of waiting or of being called back. Give progress reports every 30 seconds, and when you return to the line, thank the caller for waiting.
4. Taking a message - Take accurate messages to avoid misunderstandings later. Message should contain all the information you have. Include date, time, your initials, the caller's name, telephone number, the business or service represented and/or the information desired. Reply with details as recommended by Extension agents. Inquire whether anyone else can help them. Do not make promises to the caller regarding when the call will be returned.
5. Transferring calls - Tact, courtesy, and efficiency are essential when calls are being transferred. Before transferring a call, explain to the caller that they are being transferred and ask if they are willing to be transferred. You might say, "\_\_\_\_\_ is responsible for \_\_\_\_\_ but they are unavailable at present. May I transfer you to their extension?"
6. Placing calls - Identify yourself and your organization immediately and state the purpose of your call. Leave clear, concise voicemail messages with information needed for your return call.
7. Avoid lengthy personal calls in the office.

8. Answering machines and voice mail are most effective when the office is closed or for leaving a message for personnel who are away from their workstations. Recorded office messages should list office hours and instructions on leaving messages.

### **County Packet Distribution**

1. Sort for appropriate agents.
2. Duplicate or circulate information that pertains to multi-agents.
3. File information used as reference material as directed by agent.

### **Phone Listing Guidelines**

The local Cooperative Extension Service office should be listed in the white and yellow pages of your local telephone book.

The listing should be "Cooperative Extension Service." This listing can be a separate listing, under County offices, or under Government Offices.

If your office is located in an area of the state that needs additional identity, the listing can be "Cooperative Extension Service, University of Kentucky."

If individual agent's titles or programs are used in the listing under Cooperative Extension Service, use the most current terminology provided by Kentucky Cooperative Extension.

When advertising space is purchased for the yellow pages, use Cooperative Extension Service as the major emphasis and identify all Extension programs in the ad.

### **Children in the Workplace**

- Children should not be brought to the workplace in lieu of daycare.
- Children may be brought into the workplace if they are attending programming or on a short-term, temporary, occasional basis to address an urgent or immediate family need, provided that doing so does not:
  - Pose risks to the child, employees and/or clientele (e.g., due to illness, safety concerns, etc.); or
  - Detract from the daily operations of the office, diminish the focus of the employee/parent or colleagues during the work shift, or disrupt programs, activities, or events.

February 2024