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Extension Office Management Inservice Training Series

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EXTENSION OFFICE MANAGEMENT

INSERVICE TRAINING SERIES



COOPERATIVE EXTENSION SERVICE South Dakota State College Brookings, South Dakota
U. S. DEPARTMENT OF AGRICULTURE

EXTENSION OFFICE MANAGEMENT

Most county extension agents spend between one-third and one-half of their time in the office. The office is the headquarters of extension work in the county. Help yourself and the Cooperative Extension Service by seeing that your office is operated as efficiently as possible. Many people judge extension work by the looks of the office and the way they are treated there.

THE OFFICE

The ideal county extension office has a reception room, a room for each agent, a storage-work room, and a conference room. Your office may not be ideal, but if you plan and arrange it carefully, it can look businesslike and run smoothly.

Labor-saving office equipment is important. Good typewriters, a mimeograph, letter folder, addressograph, dictating machine or tape recorder, etc., all help with the work. Even with all these machines there must be a healthy working relationship to have an efficient office. Effective office management be-

gins with understanding and cooperation. One of the best ways to bring this about is through regular office conferences.

OFFICE CONFERENCES

Monday or Friday morning staff conferences, which include the secretary, have become routine in many extension offices. A well-planned weekly conference helps everyone coordinate work and get a better picture of the whole county extension program. The meetings provide a regular time to plan and schedule the week's work. Responsibilities can be planned, progress evaluated, and problems solved as they arise. If major secretarial jobs are listed, such as circular letters to be mimeographed and mailed, reports to be prepared, and news articles to be typed, your secretary will be able to plan a steady flow of work. Set up and agree upon office policies and procedures with the staff. Reduce to routine as many office operations as possible. Minutes saved add up to hours and weeks during the year. Always look for quicker, easier ways

to do every job. One hour should be enough time for most weekly office conferences if they are carefully planned and held in a business like manner.

THE EXTENSION SECRETARY

Your secretarial staff is very important to a well-run county extension office. Most secretaries will reflect the agent's attitudes, interests, and standards. She is the key to office efficiency. It pays to spend ample time in carefully training a new secretary. Encourage her to take a real interest in extension work and in managing a truly efficient office.

Agents are more than likely at fault when office operations do **not** function smoothly and effectively. Your secretary needs to understand what she is expected to do and why. The most opportune time to discuss the many facets of the work and what is required of a secretary is at the time she is hired or commences work.

She should have an understanding in regard to such matters as pay scale, vacations, coffee breaks, loyalty to co-workers, opening and displaying mail, attendance at staff conferences, non-extension use of office equipment and mailing lists, chain of command, limitations on personal use of office telephone and office equipment, operation of radios during office hours, and so forth.

The following is a partial list of things an extension secretary is often expected to know and do. She should:

1. Receive office visitors and handle telephone calls, make people feel welcome, handle their requests if possible, or refer them to the proper agent.
2. In the agent's absence, find out the purpose of the call. If she cannot answer the caller's question make a record of it so the agent can follow up when he returns.
3. Open and sort mail, and answer routine requests.
4. Handle the typing, mimeographing, addressing, and mailing of office correspondence.
5. Know the agent's plans and calendar of work. She should also know the approximate time of the agents return so she can answer questions and telephone calls intelligently.
6. Read and follow instructions from the state office having to do with such things as reports, vouchers, records, penalty mail, expense accounts, and so forth. See that reports are sent to the state office on time.
7. Know the extension organization, and keep-up-to-date staff lists so letters and questions can be directed to the right person.
8. Know the mailing lists and help keep them up-to-date.
9. File reference material and correspondence regularly and know where to find it.
10. Keep office records.

11. Make up monthly and annual statistical reports from daily office records.
12. Keep accurate financial records.
13. Keep an inventory of supplies and bulletins, and tell the county extension agent when orders should be made.
14. Keep special 4-H club and home demonstration group records as needed.
15. Organize the agent's appointment schedule.
16. Help keep the office neat and orderly.
17. Be on time for duty each day. The county extension office is a business office and should be conducted as such at all times.
18. Assist the agents in the preparation of visual aid materials.
19. The secretary should see that equipment which requires regular servicing is maintained and kept clean. Equipment purchased for educational use, such as projectors, screens, cameras, and so forth, should not be loaned.

OFFICE VISITORS

People seeking help at the extension office are usually ready to accept recommendations and advice. The fact that they come to the office is a sign that they have confidence in the agent and the extension service. Make them feel welcome and see that they get the best possible information and good advice.

Locate the secretary's desk so she can see people entering the office. When the caller enters, a courteous "May I help you?" puts him at ease. His answer will give her information she needs about his visit. Often she can provide the information he wants. If not, she can refer him to the proper agent. If the agent is out, she should invite the caller to return; or she should get his name, telephone number, address, and the reason for the visit so the agent can take care of it when he returns. The example form shown below "While You Were Out" can be used by the secretary for this purpose.

IMPORTANT MESSAGE	
For	
Date	Time p.m. a.m.
WHILE YOU WERE OUT	
Mr.	
of	
Phone No.	
Telephoned	Please call him
Called to see you	Will call again
Wants to see you	Rush
Message	
Signed	

If you are in your office when a visitor arrives, greet him by rising from your chair. Meet him with a smile and friendly handshake and invite him to sit down. When there are a number of callers to be seen, avoid unnecessary comments on the weather, and so forth. Get right down to the business at hand with an interested inquiry such as, "What can we do for you today?"

Pay close attention to the person as he describes his problem. Be a good listener. Question him to get all the facts. Make your recommendations verbally; then write down the important points for him, or hand him a bulletin covering the subject. Be sure the caller has the best possible answer.

You may then ask, "Does this answer your questions?" If he is satisfied, you can rise and show him to the door as you would a guest in your home. Thank the visitor for calling and invite him to come back.

TELEPHONE CALLS

You as an agent can make friends for yourself and for the extension service if: (1) There is always someone on hand to answer the office phone, (2) the telephone is answered courteously when it rings, (3) you promptly return all calls received while you were out of the office, (4) you plan conversations before making calls, (5) you clearly identify yourself, (6) you address the other person by name, (7) you give the caller the right information in as few words as possible and offer more help when needed.

YOUR DESK

Most extension agents have a standard flat top desk. Sometimes it is hard to be sure the top is flat because of the piles of papers and magazines stacked on it. When this is the case, beware—it's a sign of inefficiency. Your desk top should have on it a telephone, file basket, and **only** the material you are currently working on. Use the drawers for unfinished work and things you want to read later. Everything else should be filed or dropped into a handy wastebasket. Use a bookshelf, not the desk, for reference books.

INTER-OFFICE COMMUNICATION

Harmony and teamwork in any organization depend on mutual understanding of **what** is to be done, **who** is responsible, and **when** it is to be done.

In offices with several agents, work out some system of routing notices and correspondence to be sure all concerned are informed. Routing slips, mimeo-

graphed or printed, can be quickly clipped to letters or other material. Example:

COUNTY EXTENSION OFFICE				
Date received _____				
Info.	Action	Initials	Date	
x	County Ext. Agent	ABC	8/6	
	Asst. or Assoc. Agent			
x	HDA	WEF	8/6	
	Asst. HDA			
Return to _____		ABC		
		for		
_____ File		_____ Other		

YOUR EXTENSION CALENDAR

The saying "An extension agent lives by his calendar" is true. It is impossible for you to remember all appointments, meeting dates, and other things. Write them on a date calendar or in your date book. A master office calendar for all members of the staff is also very useful. It shows at a glance what events are taking place in the county and where each agent is going to be on a given day. It doesn't pay to trust your memory. Few things are more embarrassing than to forget a date. Check your date book and office calendar every morning until it becomes a habit. Use a calendar in planning your work to be sure you set time aside to do the important things.

A REMINDER SYSTEM

Some agents use a card system to remind them of things to do. They write reminders on 3 x 5 cards and file the cards by date. Then each morning the secretary puts the cards for that date on the agent's desk. This system is especially helpful as a reminder to make farm visits, deadlines for preparing news articles, radio and television broadcasts, and such.

Plan in advance what must be done while you work on special events and activities such as achievement days. Make a folder with the name of the activity or event and a calendar of things to do on the front. As you complete arrangements, send our circulars and news articles, and take care of other items, you can check them off the list. In this way you can be sure you don't overlook anything. Put items pertaining to the event in the folder. File the folder for

future reference when the event is past—it can be a big help in planning a similar event later on.

DAILY OFFICE RECORD FORM

A daily office record form (8½ x 11) is used by many county extension offices and kept in a ring notebook by the month for agents. On one side there is provision for statistical information similar to their monthly report form under heading of:

Methods and Activities

Program Emphasis

On the other side of the daily office form a record is made of the:

Type of call

Name and address of caller

Nature of business and follow up required

(For sample form, see pages 7 and 8.)

FILING

A great variety of material is needed to run a county extension office. Filing each item so it can be found when needed is a real challenge. It is easy to file an item you won't want again—just drop it in a handy wastebasket. File only material that you expect to want later. You need a system or you won't be able to find material once you have filed it. In the modern extension office, a carefully worked out filing plan and efficient filing procedures are a must.

South Dakota county offices have been given a standard extension filing system outlined in the handbook "File and Find." Instructions for its use are included, along with helpful tips on filing. Use this system properly and anyone in the office can file and find needed information. It is particularly important in the event of a change in agent from one county to another.

RECORDS

An extension office must keep records of different kinds. Without a system, this can be both frustrating and time-wasting for agents and secretaries. Set up and keep up a system to be used by all staff members. Each person should know exactly what records he is responsible for and how to keep them. A simple office procedure plan has been helpful in many offices. A daily office records system should be developed with your District Supervisor.

FINANCIAL RECORDS

If one is careless with public funds, he is sure to get into trouble. Records must be accurate and must account for all funds handled. It is best to deposit all income in a bank account and pay all expenses

by check. Use a standard bookkeeping system. Community organizations and groups with whom the agents work should select their own treasurer and keep their own records and bank account.

EXPENSE ACCOUNTS

You must keep a record of the miles travelled from the county headquarters and other official business expenses allowable for reimbursement. Properly prepared vouchers and forms are submitted monthly to the County Extension Board, County Auditor, and State Extension Office for auditing and payment of expenses, supplies, equipment, and so forth that are reimbursable.

REPORTS

County extension office should send in the following reports to the district extension supervisors office:

1. Monthly Report—The monthly report is due as soon as possible after the 1st of the following month and not later than the 15th. A statistical summary is required on the form entitled "Monthly Report of County Extension Workers." Each agent submits a report. In addition to the statistical section, this report requires a brief narrative description of the individual agent's major accomplishments.

The annual plan of work should be followed in writing and narrative. The first time that a phase of work is reported, it is suggested that the agent describe briefly the situation and problems to be overcome. List the objectives to be reached. Then each month as the phase of work is reported, describe what has been done, methods used, results obtained and materials prepared. This should be primarily a progress report. When a project is completed, it may be written up as it will appear in the annual report.

2. Annual Report—A statistical and narrative report to summarize extension activities in each county is required by the state and federal offices of The Cooperative Extension Service each year. The extension reporting year is January 1 to December 31. The statistical, which is a summary of the monthly reports, is due on December 15, using a recommended Form. This form and detailed instructions are sent to county offices. The narrative must be in the District Extension Supervisor's office not later than December 31.

3. County Summary of Expenditures—On December 31 of each year the county agent in each county is asked to make a summary of county extension funds used for the extension program for the year. This summary is needed in order to show county extension funds expended in relation to state and federal funds used for extension work in the state. A monthly bud-

get balance report is kept by counties. This report shows items budgeted, expended, and the balance for the month.

4. Report Forms—These forms can be obtained from the district extension supervisor's office:

- (1) Daily office records
- (2) Field diaries for extension workers
- (3) Monthly report forms
- (4) Out-of-county leave request cards
- (5) S.D.S.C. travel vouchers
- (6) County and state outline maps

You can get the following from the State 4-H Club Office, Old Extension Building:

- (1) Information about forms, enrollments, permanent record cards for leaders and state award programs can be ordered from the State 4-H Club Office on a special mimeographed order blank.
- (2) Extension mimeographed circular 514 lists all materials available for 4-H Club leaders and members.
- (3) A supply of order blanks should be kept in the office at all times. Submit requests in duplicate for filing purposes.

Get these forms from the office of the State Home Demonstration Leader, Room 125, Agricultural Hall:

- (1) Club enrollment blanks
- (2) Project leader blanks
- (3) Secretarial books
- (4) Chairman handbooks
- (5) Meeting report cards
- (6) Individual program books

You will be sent annual report forms and instructions, with 4-H Club and home economics supplements, before November 30 each year.

5. Combination Billing and Voucher Form—A combination billing and county voucher form is being used by the State Extension Office for billing and obtaining payment from counties where the county commissions pay this bill direct. This is used for county purchases such as envelopes, visual aids, annual report material, farm record books, and farm building plans. It is intended to save extra mailing, time, and effort in both the state office and the county office. This form does not take the place of the State Extension Office "offset forms" that County Extension Boards, Supervisors, and the Director sign. It may be used for billing only where some other method is used to pay the bill.

6. Supplies—Keeping enough bulletins and other supplies on hand is often a problem. A hit and miss procedure for ordering supplies is not good. Establish a system for keeping track of supplies so you can reorder before you run out.

7. Penalty Envelopes—Keep a continuous inventory of the office supply of penalty envelopes for mailing correspondence, circular letters, bulletins, etc., without payment of postage. As envelopes of each type

are used, subtract the amount from the total number on hand. Then based on past records and the agent's estimated needs, place orders before you run short. Always keep at least a 6-month supply on hand. Place your orders with the Extension Director's Office.

BULLETINS

Bulletins are one of the best teaching aids you can use. S.D.S.C. prints several different types of bulletins. The technical bulletin series are mainly written by scientists for scientists and professional workers. The *South Dakota Farm and Home Research* series is for slightly more general leadership. Copies of these publications should be in the agent's reference file.

The extension bulletins, fact sheets, and other releases should be stocked in the county office—they are written for people in the county who can use the information. They can be passed out as extra information at a meeting, used to answer a question asked the agent in the office or field or used to stimulate someone's interest in a new idea. Bulletins and folders may be mailed freely to people requesting them. Often you can use fact sheets to support a specific educational program.

Make up a display of timely bulletins and pamphlets in the extension office. You may want to set up similar displays, particularly of the less expensive bulletins, in other strategic spots in the county. Most bulletins and pamphlets are of seasonal interest. Place your orders with the Information Services Bulletin Office, S.D.S.C., well ahead of the anticipated seasonal demand. Make arrangements to pick them up or have them delivered.

A running inventory of the supply of bulletins on hand is a real help in determining when and how many bulletins to order. Your secretary can use an inventory sheet listing the names of bulletins and other releases, the number on hand at a given date, and the number of each distributed. Then when the stock supply of each publication is depleted to a certain number, she can reorder it. Another system is to mark on the storage racks the smallest supply of each bulletin you must have on hand on specified dates. Then, when the stock of a bulletin reaches this level, re-order. This system requires checking stock at least every 3 months. Use your past experience and best judgment to decide how many copies you need of any single bulletin.

Your office will receive a revised list of available bulletins from time to time. These lists should be given wide distribution.

BULLETIN STORAGE ORGANIZATION

There is no one best way to solve the bulletin storage problem. County offices usually are limited in space and have a variety of storage racks, display

boards, shelves, and file drawers. It is extremely important to have a system of storing the different bulletins and pamphlets so you can find them quickly.

The most workable plan is for agents to organize their bulletins by subject-matter content, using the major headings of the standard office filing key. All bulletins and pamphlets about Agricultural Economics, for example, are stored together in one section; and information about Forestry in another. If you use this system, set up a reference key showing both the title and bulletin number because many requests are made by bulletin number as well as title.

WEEKLY OFFICE CONFERENCE

Who attends* All agents and the secretary
County agent is responsible for initiating weekly conference
Chairmanship may be rotated among agents in the county where there are several agents

What List meetings of the week
Make a joint calendar so everyone knows the activities of the county
Check news stories to be written and decide who will write them
Discuss necessary correspondence to the county people or groups

Discuss circulars, etc., from State Office
Time off—who will be gone and on what days; include the secretary's plans too
Any unfinished business
Plan field trips
Set advance dates for events and make preliminary plans
Supplies needed and how to secure
Any questions anyone has

How

Follow an outline
Keep a record of decisions and who assumed the responsibility, and be sure to do your share
The secretary should keep a record of the meetings so she can bring unfinished business to the next meeting.

The first meeting of the month would differ in that it would include:

Tentative schedule for the month
Programs for the month
Field work for the month

Feel free to discuss questions that arise with your District Extension Supervisor. He is interested and may be able to give suggestions for improving office efficiency.

SUGGESTED DAILY REPORT FORM

COUNTY _____

Page 1—Daily Record of Office and Telephone Calls, Date _____

Type of Call	Name and Address	Nature of Business

Page 2—Suggested Daily Report Form

Agent _____ Date _____ County _____

Place _____ Statement of work done _____ Meetings
No. Attended _____ Miles _____

Expense Account B _____ D _____ S _____ L _____ Mileage _____

METHODS AND ACTIVITIES

Farm and home visits, etc.	_____	Broadcasts made radio	_____
Office calls	_____	Broadcasts made TV	_____
Telephone calls	_____	Publications distributed	_____
Newspaper articles, county prepared	_____	Individual letters written	_____
Newspaper articles, state prepared	_____	Circular letters written	_____
Office staff conference	_____	Circular letters, copies mailed	_____

PROGRAM EMPHASIS

	Time Day		Time Day
PROD. MGT. RESOURCES		FAMILY LIVING	
Planning and mgt. of farm business	_____	Planning management in home	_____
Field crops	_____	Family economics	_____
Soil management	_____	Home furnishings	_____
Soil and water conservation	_____	Clothing selection and care	_____
Horticulture	_____	Clothing construction	_____
Forestry	_____	Food preparation and selection	_____
Home grounds improvement	_____	Food preservation	_____
Plant pathology	_____	Nutrition	_____
Entomology	_____	Child Development, human relations	_____
Chemical Residues	_____	Health	_____
Dairy	_____		
Poultry	_____	Safety	_____
Livestock	_____	Recreation	_____
Animal, poultry health	_____	Leadership development	_____
Agricultural Engineering	_____	RURAL DEV. AND PUBLIC AFFAIRS	
Dwelling and Equipment	_____	Community dev. and resource adj.	_____
Outlook	_____	Public affairs	_____
MARKETING AND UTILIZATION		Miscellaneous	_____
Inservice training	_____	Total Days Worked	_____
Extension organization and planning	_____		

(Time may be reported to as little as (.1) one tenth of a day on the daily record.)

Of above reported how much is devoted to:

Adult work	_____	Public agencies (Indicate which)
YMW	_____	Federal
4-H Club Work	_____	State
		County

(End of Form)