**Meeting with Extension Association Leaders and Extension Administration**

**10/8/19**

Note that questions in bold were provided by the associations in advance *or* were questions posed/statements made by association representatives during the in-person meeting.

**Morning Session with a Focus on 4-H (Wade Weber and Gregg Hadley)**

* **Communication: Cvent vs. 4HOnline. Why this change? What is the plan for future registration systems and how will this be effectively communicated with the system on how this will work?** (Answered by Wade Weber)
	+ Both Cvent and 4HOnline are event registration software that process registrations and payments and represent the customer service aspect of online registrations. Wade said he affirms the customer service side of this process and appreciates it. However, as issues arise KSRE professionals must continue to communicate and work directly with the 4-H department; they don’t know what they don’t know until they receive feedback. Contextually, there are many things happening simultaneously re: this change. 4HOnline is a vendor that provides a service to 45 states/territories, this has been the exclusive vendor (this is Kansas’ 5th year). In the last 2 years we have been told that 4HOnline would receive a major upgrade; there are 5 states piloting 4HOnline 2.0 this fall (KS is not one of them). We will see how the early adopters do with the new, enhanced, mobile- and user-friendly interface. That being said, it’s still in the testing phase and as an administrator he is paying the annual subscription fee of $20,000 a year (which is divided between the 105 counties); they made the decision of equally splitting the cost for 4HOnline geographically (vs. volume) for ease-of-invoicing. 4HOnline has an event registration system within it, that in 2017, when Wade arrived, we had not utilized. We had volunteers that were signing up to attend trainings that were not approved/registered volunteers (particularly in regard to Shooting Sports). When looking at the system and this error, we looked to see how we can avoid this and embed the link within the 4HOnline profile. You must first develop a 4HOnline profile before registering; this is the only way we have to keep track of “who’s who” in the 4H volunteer realm. They needed an event with enough critical mass to see if the system to work. In Fall 2018, they piloted that with Shooting Sports. We are now using the feature that we were paying for but were not previously utilizing. Cvent: you pay it first – it is not an annual subscription – they ask for a 3 year commitment; we are currently in year 3 and we paid ~$19,300 to use it; we will be using Cvent a lot more this year since we paid for it. We invoiced per user for the use of Cvent so we could pay it forward in the future. In sum, we were not using a feature of a system we were paying for. We previously paid for another system and we need to use that, as well. Local units also have their own sign ups, which is their own prerogative, but how many systems are we going to use system-wide and we wonder why our customers are confused. How can we move forward? 4HOnline and a new suitor (ZingSuites). CES nationwide had decided in middle of 2018 to use the same system so we can have better reporting nationwide. The next steps is that we will be talking with online record keeping and a company has agreed to use ZingSuites in an attempt to revise the process. 11 local units are piloting this in the next year with younger 4-H members at a reasonable cost (less then $4,000 a year for 11 units to pilot this). ZingSuites is proven in their record book area, but not in their event registration and management portions. The pilot will be the mobile interface. **Are you going to kill cvnet?** This is being discussed and will be determined in the future. **The timeline for 4HOnliene event registration is…?** Currently the system has the capability and it is currently available. This is not fee based, it is paid for by the local unit subscription. Cvent has the $5 fee. His concern with mainstreaming the 1.0 version of 4HOnline is that it could all change in a year. **Bottom line.** We are looking at other providers and Cvent is in the mix. **If we have kids that have not paid membership dues and cannot register for events, is there anyway we can make sure we tie to that program so we can note if families or 4H councils are paying? We pay for all of our kids but we send one check, so our kids can’t register because they are not able to sign up because they are showing as “pending”. How do you do it?** One of the best ways you can aid the state office staff is to communicate if there is a regular time that you will send a check. When there’s no communication of when a check is coming, there’s no way for us to discern if this is a delinquent payment. **Why can’t the state office determine who will be paying for their kids? There is no communication and there seems to be an issue of state-office receiving local unit checks.** There has been no functional option from our vendor and we have not been able to find a workable solution. 4HOnline might solve some of this, but we are waiting to see. Currently, we are triaging the current system. 90% of this is because I have been told by our vendor that 4HOnline 1.0 could be pulled in a year; we cannot find solutions when major changes may/may not be happening. **The group requested warning in advance of system changes so that local units can be prepared.** Wade said we would have a minimum of a 2-year lead time. **Ir we are not moving forward with Cvent, will we still be charged the $5 fee? We used the system this past weekend.** The goal is that we will announce this as soon as we know something. We will not shut down what we’re currently using until we have a workable and viable option.
* **Is there a protocol followed for emails toe be sent through 4HOnline to 4H families? It seems that families are being bombarded with emails from both the state and local offices.** (Answered by Wade Weber)
	+ 4H state office estimates that emails are sent from the state once per week. There are communication functions in 4HOnline that both the state and local units can utilize. Again, we already pay for it so we need to equip folks to utilize it. How local offices structure their newsletters, etc. and information management is up to them. We are not trying to overload the system – most of our communication is about events. We are attempting to balance meeting the needs of our families and our local units. I’m open to exploring how we can be mutually beneficial. **It seems like local units need to work with the state office to make sure that everything is set up correctly. Also, should we expect that every state event will be sent out by the state office to all families? What do we expect day-to-day of what is going to go out? We seem to have no idea when some communications go out and it would be nice to know when/what information is going out.** That’s good feedback and with our transitions we will move forward with these ideas.
* **Calls/emails are not being returned. Why is this happening?** (Answered by Wade Weber)
	+ Specific issues were noted by Wade. If there are any other performance/communication issues, please share but be aware that we receive a high volume of requests. **It was suggested that staff acknowledge receipt of emails and that things are in process.**
* **With no previous notice/discussion to the association and members we are informed of Kansas 4H covering all members and volunteers with insurance from American Income life. It is appreciated that details have been worked out for the units to get reimbursed for policies already in place. However, no details have been shared with what volunteers will be covered. What volunteers are covered? What happens when a new volunteer comes on board? Are the members covered even if they are pending because of a non-payment?** (Answered by Wade Weber)
	+ Timing: He estimates 40% of local units were not covering their volunteers/clubs. After 2 years of the program fee, we had funds to support a statewide policy. Wade made the executive decision to implement this statewide. American Income Life was to inform local units that someone else covered their expense, and a refund check would be issued for those who had paid/were offering coverage. We are concerned about safe environments and this is part of the enrollment moving forward. This was not to devalue the association or its members, but to benefit the whole system. **Do we still need to get insurance to cover incidental volunteers/members?** Yes. **All members who enrolled last year were used to estimate the blanket policy that includes any participants in 4H in the next year.** My suggestion is that it’s the responsibility of the KSRE professional to judge the risk and how many individuals who are attending who are covered/not covered. He encourages you to treat every individual who comes to the event as a 4-H member. He would encourage you to take out the supplemental insurance to cover non-4H members who attend the event. There is no such thing as being covered/not covered by your status in 4H online. Wade intends to continue to purchase this insurance statewide.
* **What’s the status on the NW 4H Specialist Positon?** (Answered by Gregg Hadley)
	+ If a hiring manager declares a failed search, then the position is held for 6 months (as of right now). We can start the process for this position post January. **What are you looking for in this position?** Let’s assume they’re good Extensiony people, generically we want somebody that can do the nuts and bolts of the job but also pushes the frontier. Specialist positions tend to not turn-over, so we need to get it right. **How are the current responsibilities being addressed in the NW?** The other NW area specialists have divided those tasks and they are being covered.
* **Program fee.** (Answered by Wade Weber)
	+ We have been able to hire 2.5 people to provide program leadership and guidance moving forward. The trajectory is positive. We are investing in people so we can modernize our programs.

**Afternoon Session: All Extension-Related Issues (Gregg Hadley and Extension Administration Team)**

* **New Agent On-Boarding**.
	+ A thorough explanation of the refreshed Extension on-boarding process was given. Specific attention was given to reporting/evaluation/PEARS. Extension administration did focus groups with new agents and found that PEARS training isn’t quite enough. A hands-on PEARS training might be necessary. **What other things should we be orienting our new agents in our local units toward? What competencies?** Currently we do “getting to know your community”, “your community of interest”, “what does this all mean to writing your action plan?” **Basic supervision skills are needed.** Local unit director basics course is offered every year. The next session will be in March of next year. **Yes, but new agents need to know a bit right off the bat.** This is probably a good suggestion. HCS also offers and introduction to supervision course, as well. We will check into this to see if it is offered via zoom. **This also needs to include how to work with office professionals, etc.** One thing that keeps coming back about our on-boarding is that we are lacking in how do I navigate my local unit? That is difficult for administration to deal with because this is not universal; the culture in one local unit is completely different than the next. This is where our mentoring program is needed. This is something the professional associations can help to reinforce to their members. **The piece we’re missing is the local board chair and they are not involved in this process. We need to involve the board members and other staff in this training.**
* **What do things actually mean? Contact? Program?**
	+ There is a draft of guidelines for reporting direct educational contacts. This will hopefully help answer a lot of these questions of what should I report and when. We want to make sure that we’re not double-reporting and we’re working to enhance this process. The quarterly effort report is used in a variety of ways and is critical. If there are questions later, you can email Laurie Chandler. **How do we report trainings and professional development events we attend?** At the state level maybe this isn’t important, but it is certainly important with your local boards.
* **Four quarterly reports should be sufficient for annual reporting, no need for additional documents.** We have to have quarterly effort reports and impact reports. **There is a frustration that annual reports have awful timing due to other deadlines, etc. A lot of frustration is “how am I supposed to make this work and get all of this put in at one time?” Another take is that if you separate impact reporting from the evaluation piece. That’s a lot of work to do in a short period of time. Perhaps we can combine impact/quarterly reports and then at the end of the year I can reflect on my performance review (September). Another opinion: do we need to not come back at the end of the year and report back our entire impact? If you work on something all year long you don’t get the big picture of what was accomplished? So, how is the information used at the state and federal level?** The contact are important and quite frankly other organizations that use PEARS are doing a much better job of reporting things than we are. NDSU has a report put out for impacts for each focus area of NDSU Extension. We can’t do that because of a lack of data, and that’s concerning. All impacts are important. Our funders are looking to see: 1) Are you guys working (contacts)? 2) Why are you doing what you’re doing? And 3) are you successful at it? This is what has spurred our efforts towards the signature programs. **Any suggestions for how to improve that last piece?** Agents locally need to get over the fact that they feel the need to report all kinds of activities to their local reports; we are showing activity. We need to show impact. Why don’t we go into PEARS and pull off board reports?
* **There seems to be widespread confusion about what counts as verifiable expenses.** You need to examine the K-State PPM (policies and procedures and manual) and go to the reimbursable travel expenses. Section 1.0 provides what is allowed/required for per diem expense reimbursement. One question recently had to do with same-day travel when the workday is extended 3 hours beyond work day and you are 3 hours away from your normal work station. With permission from local unit director/department head, some reimbursement can be claimed per the PPM. There are maximum amount requirements for state lodging rates, etc., so you can see the PPM in the subsistence chapter in the PPM. Further links will be added to the website so this is more clear. **Same day expense: if they’re using the spreadsheet, it doesn’t work for same-day expenses.** Don’t use that form in that case. That’s at the discretion of the director, as a reminder**. A question was asked about districts and workstations.** If you are within the district you are within your local workstation. If you are outside of the workstation, you can claim reimbursement.
* **To what degree should agents be committing to organizational service, programming, and professional development? Do you think if we did something like this that it would have a dramatic effect on the organization?** It may, but the issue that we have is that we have a co-governing structure. They may look at the mission of an agent very differently than others. **10% of their time in professional development per an ECOP report. With the org. citizenship/service, about 10% of your time should be dedicated to improving the profession and the system. For years we have also said that 50% of your time should be proactive programming – not reactive. Perhaps an expectation should be rephrasing this to include PSE work, etc.**
* **Is our current load of in-system training and professional development adequate for today’s professional? I routinely see information from boards is that all my agents do is go off to professional development activities. In the listening session, I had a discussion with a board member who said that new agent on-boarding was taking 50% of their agent’s time; this is impossible. It’s ~10%.** There’s no standard of what is expected; if there was some standard by which things could be judged, we could have a lot more dialogue about that. **Do you feel that you and your colleagues receive adequate core competency and professional development?** The potential is there, whether or not I have the freedom to get it is a different story. Where are you getting the professional development training from? The University? Other organizations that are not related to Extension. Some of the trainings are not effective for the amount of time spent. Some of the frustration is that yes we’re at meetings all the time, but what are we getting out of it? How do we know it’s going to be quality? Or is this a check-box? **It would help to have a reflective piece on your professional development through the year. There’s a difference between training and professional development; our current process seems to be a lot of training.** We don’t do a good enough job with training on technical skills, as well.**We need to do a better job of getting board members on board with what is expected. Another comment: When you put in your professional development plans, what’s your sense? Are people being thoughtful? Or is it checking the box?** It is not about what the agent needs to exceed at all; we have a report we need to fill out once a year and we check the box. Sometimes it limited to what is in the catalog. Some of those skills (like CMS training) might need to be in the catalog so we can include those types of things. There are trainings available that would be helpful but we don’t think of those as options. Associations need to also be sure to put in professional development opportunities.
* **Agents are looking at professional associations as “one more thing they need to do”; they feel pressure for leadership positions and they don’t go back; as we hire more and more specialized agents, they see their home outside of the Extension network associations, but rather their content area; they don’t feel like they have what they need to sell it to the board – what is the value to myself as a professional to pay for this from board dollars? We need to communicate this value because people are not joining just to join anymore generationally. Most of them have given the associations the chance, but they didn’t walk away seeing the value. We seem to be doing a lot of professional development within our PFTs, and we don’t need the professional development associations anymore.** PFTs are more specialized, the association connects them back to the state and national levels; this argument may/may not be effective. We also need to communicate that what you put into the professional associations is what you’ll get out of it. **We need the associations to communicate WHY they should be a member of the association and what the value is. How can we as associations adapt to the new generation of extension professionals?** Some of the associations that have better retention have a mentoring approach. What’s the value for admin in having professionals participate? **If the professional development is there, if the mentorship is there, if interactions are there, if scholarships/recognition opportunities are there. If the value is that we have our business meeting and out evening function at annual function, then no. I think the professional associations can do a good job of mentoring future extension professionals and reinforcing the idea of professional developing. Feeding information back to Extension admin about what is working/what isn’t working/etc.** What is your role in communicating that message to the system? **Our role is to be there and provide that information and be sure that you’re included in new agent onboarding, in the Tuesday Letter, etc.** Does that get to that value proposition of being in an association? **We need to do a better job of communicating how that impacts the clientele out in the communities. Another opinion, attending the showcase of excellence at national meetings and the county commissioners called requesting a program on a certain issue; I had just gone to this presentation; I walked back into my county commissioners and had a program ready to go. There was tremendous value to the county commissioners and it was all because of the professional association. Here’s an observation: a lot of Extension directors look at the amount of money and resources given to professional associations and question what is this doing for us? Frankly, I think there is at the director level and new Extension professional level, these organizations look like they’re on cruise control. We are doing things because we have always done them. And that is not a good place to be.** The challenge then becomes how do you do that? And who has the time and energy to do it?
* **Agents well-being. Many have trouble sleeping, have anxiety, mental/physical stress, etc. Are there any plans to deal with the toll this job has on agents and specialists? In exit interviews have questions been asked about the demands that have led to a staff member leaving?** We ask why they left/are leaving, what they’ve appreciated in their job, what could we do better to enhance an agent’s experience, a series of likert-scale questions on communication with board/directors/etc. with issues? And what else do you want to tell us? Topics such as scheduling, demands, and workplace environment do come out. Anecdotally I’m seeing a shift; it used to be that co-workers couldn’t get a long and now it is directed towards boards. They are causing me to stress and hopefully that comes out of listening sessions and these conversations about teamwork/office environment type of things that we have seen this shift from co-workers to boards. **What specifically do we need to be aware of about the board?** The general word is conflict with the boards. Conflict related to dual-governance of the agents, conflicting expectations, and in some aspects it gets down to what the focus of the board is. Some people come in and want to be on the board so they can be sure someone doesn’t show up to their fair; this can be a major issue. Professional boundaries, as well (board members crossing them). When you have a director of a local unit, you may feel removed from the board and others have said that. Historically, the county agent position used to be the premier position in the county to get and now that isn’t the case in may situations. **When you are working as a public servant, you feel like everyone is your boss. You feel like you have so many people that you need to answer to. And how do you decide what is most important? There’s just so much more happening for agents in general. If you’re not out there and showing yourself off, you’re behind.** We are making boards more aware of what new agents are doing for their onboarding process.The Board Leadership Series is working on doing a lot of new trainings. **If part of the problem is too much oversight by the board, then what are we doing? When we ask the board to evaluate them, we oftentimes hear that they don’t know how to evaluate us.** What suggestions do you have for agent well-being that can help us help agents? Professional development used to include work-life balance and what they need to be working on/priorities, etc. Asking people when was the last time you took a day off? One of the things we hear a lot in focus groups and exit interview is the work-life balance and that professional scheduling is broken. We have a lot of busy work and emails, there’s always something there, and having 24/7 access on our phones doesn’t help. Establishing guidelines for your local office about responding to things that happen on Saturdays or 1am. **New opinion: it seems like people need to be completing these “exit interview” type of stuff regularly.** Sure, but what are you going to take off their plate? We need to make the time to have these difficult conversations particularly about expectations. If you need to get boards off people’s backs then you need to put it on the supervisory director; more than 50% of staff could be safeguarded. What are the safeguards we could deploy to protect agents and alleviate some of the micromanaging issues that seem to be contributing to people leaving. Another thing is proving guidelines for agents – how much time should be spent on programming? How much on professional development? **How able are you all to say enough is enough?** It is really frustrating b/c I feel like I can’t turn off – my district director needed a response, I had 4-H issues that needed to be addressed immediately. **How much of this is us doing a good job of prioritizing?** Going back to the board leadership series, we need to highlight what the responsibilities of the agent are. They are not to be responsive 24/7. In the future, we need to look at professional development we need to think about a serious discussion on power relationships and recognizing them and tying that into volunteer development and working with volunteers, what are the needs of our volunteers? Looking at mental health issues and what can we do? How can we cope with that within our jobs? We need to identify to the boards what their roles are and are not, and who they answer to. As a system, we need to be aware of active shooter training and other things that we haven’t done before. **Some of these types of trainings, is this something that JCEP might take on and be seen as a benefit for our extension professionals?** We also just need to get to know each other. We have lost comradery and neighborly communications. We used to collaborate more. **Gregg thinks the professional associations could be a good conduit of well-being initiatives for KSRE professionals.** L. Jones’ presentation at JCEP national conference was on time management – it was very useful.