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The Need to Know Information for CEDs within the First Month on the Job

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County Extension Directors (CEDs) are Extension agents who serve their local clientele through educational programming, while also serving as liaisons between their state Extension system and their local government and elected officials. Responsibilities within this administrative role include handling and managing personnel issues, fiscal management and oversight, and communicating and maintaining relationships with elected officials. Researchers asked CEDs in Florida and Georgia with less than five years of experience the most important information for a new CED to know within the first month on the job. The constant comparative method of analysis was used to identify recurring themes from the open-ended question of an online-administered survey. Six primary themes emerged: (a) policies, procedures, and MOUs; (b) deadlines and reporting; (c) human resources, personnel management, and fiduciary responsibilities; (d) roles and responsibilities; (e) relationships with elected officials and administrators; and (f) identifying resources. Extension professional development staff should either create or modify existing training programs to include the most important information CEDs need to know within the first month on the job.

Keywords: Extension, County Extension Directors, training, professional development

Introduction

County Extension Directors (CEDs) are Extension agents who have a split appointment between their educational programming and serve as the administrative leaders of their respective county Extension offices. CEDs perform administrative functions such as formulating and evaluating county Extension programs, coordinating personnel functions, serving as the link between the county Extension office and Extension administration, communicating and maintaining relationships with county stakeholders, and providing leadership and mentorship to the Extension agents in their office (Elizer, 2011; Radhakrishna et al., 1994). CEDs have three primary responsibilities: (a) to maintain an active role in the delivery of educational programs in

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a specific program area; (b) to provide leadership and coordination for the total county Extension educational effort; (c) to manage the administrative affairs of the county Extension office, and (d) to provide leadership and assume responsibility for all aspects of affirmative action programs (UF/IFAS Extension, n.d.). Unfortunately, the CED role is often impeded by a myriad of issues, such as the changing landscape of Extension (Sanders, 2014), inadequate support (Campbell et al., 2004), and little training and development (Sowcik et al., 2018).

Few CEDs have the leadership competencies to be effective in their administrative position (Sanders, 2014) even though Extension has recognized CED competency development as a critical priority (Jayaratne et al., 2010). Campbell et al. (2004) supported this notion that CEDs were ill-prepared, and their administrative roles were often not supported, while Sowcik et al. (2018) expound there is a gap in the literature surrounding both Extension leadership development competencies. The Agricultural Education National Research Agenda (Roberts et al., 2016) emphasized the importance for agricultural educators to “determine the most effective means for incorporating and assessing soft skills development in both formal and nonformal settings” (p. 30). Extension program and staff development professionals must continue to understand and expand the literature surrounding the gaps and training needs of CEDs.

According to Sanders (2014), CED leadership competencies are divided into human skills and conceptual skills (Figure 1). Human skills have been defined as “the ability to work with people” (Katz, 1955, p. 36). Sanders characterized human skills as the competencies related to communication, mentoring and listening, relationships and interpersonal skills, ethics, and personality (2014). Conceptual skills are defined as the “ability to see the enterprise as a whole; and includes recognizing how the various functions of the organization depend on one another, and how changes in any one part affect all the others; and it extends to visualizing the relationship of the individual business to the industry, the community, and the political, social, and economic forces as a whole” (Katz, 1955, p. 36). Sanders characterized conceptual skills as the competencies related to vision, understanding the needs of the community, organizational management, programmatic efforts, environment and culture, and marketing and public relations (2014).

CEDs in Florida and Georgia are critical to ensuring the Extension mission is carried out in their local communities; however, CEDs must also be competent for this to happen. CEDs begin their job with a myriad of experience and skillsets, which can make it difficult to target specific competencies and skills needed most early on in a CED’s career. CEDs have historically been promoted from county agent positions (Elizer 2011; Rudd, 2000), yet there is a trend to hire new CEDs with no previous Extension work experience (Benge et al., 2020), making it more difficult to develop sufficient onboarding and training programs. Sanders’ (2014) Leadership Competencies model provides clarity regarding the total skillsets needed for success but lacks guidance for when to train and what topics are most important early on in a CED’s career.

Figure 1. CED Leadership Competencies Model (Sanders, 2014)

Methods

The purpose of the study was to identify the most important knowledge new County Extension Directors in Florida and Georgia need within the first month on the job. The findings presented in this article are part of a larger multi-state study with the Universities of Florida and Georgia that investigated onboarding implications for new County Extension Directors. The term “county Extension director” (CED) was used in this study to refer to the entire study population, as both Extension systems use different terminology for their county Extension office leader. Institutional Review Board (IRB) was obtained prior to conducting this study.

The population of interest for this study was CEDs in Florida and Georgia with five years or less of experience being a CED. A list of current CEDs with five years or less of CED experience was obtained from UF/IFAS Extension Business Services Office ($N = 24$) and UGA Extension Office of Learning and Organizational Development ($N = 62$), yielding a total target population of eighty-six new CEDs. A researcher-developed questionnaire was administered online through Qualtrics (Qualtrics, 2016). The survey consisted of six questions, with the question pertaining to this specific study being, *in the first month of their job, what is the ‘Need to Know’ information for a new CED?*

The researchers followed Dillman et al.’s (2009) tailored design method for distributing the survey, as it has been shown to yield high survey response rates and suggests survey procedures that are scientifically founded. An email with a link to the study’s online questionnaire was sent to each CED within the study’s target population of new CEDs ($N = 86$).

Each a week apart, two follow-up emails were distributed via Qualtrics asking CEDs to complete the survey. Forty-three responses were completed yielding an overall response rate of 50% ($n = 43$). Table 1 identifies the characteristics of respondents as appropriate for this study.

Table 1. Characteristics of Respondents

	<i>f</i>	%
State Extension System ($n = 43$)		
University of Florida	17	40%
University of Georgia	26	60%
Total years working in Extension ($n = 43$)		
1-5 years	17	40%
6-10 years	7	16%
11-15 years	8	19%
16-20 years	6	14%
21 years or more	5	12%

One of the researchers conducted the initial analysis of the data using the constant comparative method (Merriam, 1998), which is used to reduce data into identifiable, recurring themes (Lincoln & Guba, 1985). Trustworthiness was addressed in three ways: (a) an audit trail was maintained throughout the data analysis process, and direct quotes were used to create a thick description of the findings; (b) both researchers collaborated on the final interpretation of the data in a form of triangulation; and (c) the final interpretation was shared with a CED from each state as a member check (Lincoln & Guba, 1985). Qualitative data can be analyzed and interpreted with bias by researchers (Shenton, 2004). One of the researchers is an Extension professional with seven years of experience as an Extension agent and four years of experience as a state specialist. The second researcher has been an Extension leadership development specialist for eight years. While both researchers work closely with CEDs in their respective states and conduct CED professional development and training, neither researcher has held a CED level Extension position, which allowed the researchers to approach this study more objectively without the influence of personal experiences in these roles. The conclusions drawn were based upon the data and observations with no influence of having served in a CED role.

Findings

Six primary themes emerged from the open-ended answers provided by participants. Summaries of each theme are provided, and responses were coded to ensure confidentiality.

Policies, Procedures, and MOUs

Respondents identified policies and procedures (R6, R12, R16, R 24, R34) as information new CEDs need to know in their first month on the job. Specific policies and procedures included information technology (IT) (R1), process for hiring replacement Extension agents (R15),

process for justifying and creating a new county agent position (R15), and what things need to be passed on to the [District Extension Director] and beyond (R3). Respondent 19 stated, “There should be [Standard Operating Procedures] for CEDs,” and Respondent 28 stated, “The information that can cause legal repercussions is of utmost importance.” Understanding the state and county hierarchical structures (R1) and how both the county (R11) and state (R9) works were important information to know. In addition, understanding how to read the county contracts and Memorandums of Understanding (MOUs) is important know (R3, R13), with Respondent 42 stating, “How to read the county contract between Georgia and the local county and how you can adjust it.”

Deadlines and Reporting

Knowing deadlines (R26), reports (R6, R9, R23), and reporting requirements (R15) are important for new CEDs to know within their first month. Respondent 44 described a chart of responsibility would be helpful to know regarding dates and deadlines. A timeline would be helpful for new CEDs (R3, R8, R29), with Respondent 29 stating, a “timeline of reports due to the district office and when,” and Respondent 8 stating, “A timeline of when things will be due – budgets, [Record of accomplishments/plan of work], all the end of year reporting.”

CED Expectations

Human resources and personnel management (R12, R34) was indicated as an important expectation for new CEDs to know. Understanding faculty and staff expectations (R1) and how to effectivity manage office staff (R7, R21, R24, R35), disciplinary procedures (R3, R4, R7), and “the legalities of time off and ‘comp’ time for employees” (R26) were cited as important to know. Leadership skills such as “how to give timely constructive and positive feedback” (R7), “office dynamics and working with people in a new capacity” (R40), and knowing good people skills (R18) were also indicated. The ability to completely understand how to complete the day-to-day personnel management skills were perceived as important, such as approving time (R3, R9, R13), managing staff schedules (R27), managing program assistants’ time cards, and the “how-to” for leave requests (R29).

Navigating the financial and budgetary policies and procedures was cited as another important expectation for new CEDs to know (R19, R37). Respondent 31 stated, “There are many things to learn as a CED, but the county fund policy would probably be #1.” Understanding QuickBooks (R19, R22, R27, R33, R38, R41), the county funds policy (R18, R26, R29, R30, R33, R36, R38, R41), signing checks (R29, R33), reconciliation reports (R22, R33, R43), and the county budget (R4, R12, R13, R29) were identified as specific skills and procedures needed by new CEDs. Respondent 42 stated,

Knowing the difference between the county budget and Georgia QuickBooks and how to navigate between the two, how the Extension service is financed, who pays for what, when, and where.

Roles and Responsibilities

CED roles and responsibilities were reported as important to know within the first month (R5, R16, R27, R40). Respondent 4 explained CEDs need to know what they should and should not do, and Respondent 42 said, “Duties, responsibilities, and who is in charge.” Respondent 25 stated,

CEDs need to know what we are expected to do before we go to training. While that is a very vague statement, the idea is that new CEDs need a “To Do List” for the first few months. Much like all of Extension, CEDs are sort of dropped into the job trying to figure everything out. Therefore, above all else, there needs to be a comprehensive list of things that must be done.

Balancing CED responsibilities of being an Extension agent and part-time administrator can be difficult (R1, R17, R30). Respondent 5 said, “how much time is expected to be spent doing CED duties and how much to spend on your specialty” is hard to discern. Learning to balance both university and county responsibilities was reported as important to know for CEDs (R5, R8, R9, R14). Knowing expectations for the first year is also important (R16); Respondent 40 suggested an administrator visit with them to go over expectations. Specific responsibilities identified were the appropriate amount of time to be involved and/or oversee other agents’ programs (R4, R19) and how to capture urban CED administrative efforts in the annual report (R15).

Relationships with Elected Officials and Administrators

Understanding who the elected officials are and how to communicate with them is important for new CEDs (R6, R40). Respondent 23 stated, “Your relationship to the county administration is vital.” Identifying the elected officials and administrators (R36), quickly forming strong relationships (R33), knowing the best person to contact in the commissioner’s office (R27), and knowing how to work with county administrators (R29, R30) are important for new CEDs to know.

Identifying Resources

Identifying resources and the right people were reported as important to know for a CED within their first month. If you are new to the organization, where the experts are (R8), who you contact in human resources for what information (R11), how to find things on the website (R36), who to reach out to for help (R20), and where the evaluation forms are (R16). Having a good mentor that understands administration (R9) is important to have as well. Respondent 29 stated,

I did not have my first Georgia training until at least six months after my start date, and no one came to my office to show me how to set up anything, nor did I get a phone call to walk me through anything. If I was doing something wrong during that time, it would have certainly been due to lack of knowledge. I'm one to pick up the phone and call with questions, but this is an intimidating job at first, and not everyone knows the "who" to call and feel confident to make those calls. You should never stick a CED in a county to flail and sink or swim on their own with no direction.

Conclusions and Implications

County Extension directors serve a crucial role as the leaders of the county Extension office, and CEDs new to the job need important information right from the beginning. Results of this study indicated specific information CEDs need to know within the first month on the job. The key themes identified by respondents were (a) policies, procedures, and MOUs, (b) deadlines and reporting, (c) human resources, personnel management, and fiduciary responsibilities, (d) CED expectations, (e) relationships with elected officials and administrators, and (f) identifying resources. Sanders (2014) indicated that both human skills and conceptual skills are important leadership competencies for CEDs to possess; however, results indicated the majority of information CEDs needed to know and understand fell under the umbrella of conceptual skills. Human skills were also important; however, new county Extension directors identified a greater need in leadership competencies associated with conceptual skills.

Bennis and Nanus (1985) explained that leaders need to understand an organization's knowledge to provide vision and lead, and Owen (2004) found that knowing the organization and its structure is a critical developmental need of new CEDs. All new employees should understand organizational management skills, such as policies and procedures, managing finances, and day-to-day processes when they begin a job, which was indicated as a critical need, as well as know where to go to find this information. The partnership between the land-grant university and its county partners creates an additional need to understand the contract or MOU between entities.

Understanding the county Extension director's roles and responsibilities is a key skill that needs to be addressed. CEDs have a multitude of various responsibilities (Elizer, 2011; Radhakrishna et al., 1994), and this study's participants explained CEDs need to know this information right from the start. Two specific responsibilities that are vague to new CEDs are how to balance being an Extension agent and CED and understanding how to manage the conflicting roles between the CED's county and university. Sanders (2014) cited both programmatic efforts and being a liaison between the county and state university as important competencies needed by CEDs, indicating Extension organizations are not developing this important competency in new CEDs. The relationship with the county partner and policymakers is an important human skill a CED needs to possess, such as being able to identify elected officials, forming relationships in counties where it is acceptable to, and knowing who the point of contact is. Knowing who the

stakeholders are, forming relationships, and knowing how to get connected to them are important for Extension agents to be successful in the CED role (Sanders, 2014).

Recommendations

Program and staff development professionals within Florida and Georgia can use this information to guide onboarding programs for new county Extension directors and leaders within their organizations. In addition, though this study is focused on Florida and Georgia only, these findings can be used to either implement or improve onboarding practices in other state Extension systems. New Extension employees should always have a strong onboarding program, but CEDs, specifically due to their leadership role within each county, should have increased attention and focus from administrators and those involved in training and development. State Extension systems that have an onboarding program or new CED resources should review their materials to ensure the key human and conceptual skills and competencies identified from this study are included. Administrators in states without a CED onboarding program should: (a) make it a priority to establish a training and materials for new CEDs, and (b) reach across state lines to those who have such programs as a starting point. Some state Extension systems have CED onboarding programs that might be willing to share information, and the National Association of Extension Program and Staff Development Professionals (NAEPSDP) can be utilized for states to connect with other states.

A CED onboarding program can be delivered virtually through technology such as Zoom or in-person. Most important is that topics around (a) policies, procedures, and MOUs, (b) deadlines and reporting, (c) CED expectations, (d) roles and responsibilities, (e) relationships with elected officials and administrators, and (f) identifying resources should be included early and often into the onboarding process. The onboarding process should also include opportunities for new CEDs to ask questions of their District Extension Directors (DEDs) and more experienced CEDs. Involving more experienced CEDs into the onboarding process allows new CEDs to ask questions about those previous experiences and unique situations that may come up in their county offices and local communities. While there are policies, procedures, and best practices for CEDs to follow, each county office and its employees are different, which requires the human skills identified by Sanders (2014) to be developed.

State Extension systems should also establish CED mentoring for new CEDs. CEDs may be new in their role as a CED, and in some cases, also new to their role as a county Extension agent. Many Extension organizations provide mentors for programmatic-related support, but not for leadership and administrative support required of a CED. Similar mentoring models can be implemented for CEDs with a checklist of suggested topics to cover in meetings between the mentor and mentee. The DEDs should also provide opportunities for new CEDs to meet with them on a regular basis. This may include a monthly check-in for all new CEDs for the first six to 12 months in their role to allow the DEDs to cover specific, current, and relevant information

as well as provide new CEDs the chance to ask questions. Given the amount of information, knowledge, and skill level necessary for CEDs to be successful, repetition and opportunities to further discuss these topics are critical.

The current study focuses on the competencies and skills needed within the first month. Future research should examine what skills and competencies are needed within the first three years of being hired as a CED in order to map out a specific training and development schedule for Extension program and staff development professionals. Because the current study only focused on two states in the south, more research is needed in other states and regions of the United States to better understand the holistic needs and gaps in CED knowledge and knowledge transfer. A qualitative study is recommended to understand how CEDs learn information and gain the competencies needed to be successful.

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