

# **ALABAMA COOPERATIVE EXTENSION**

## **4.11 Professional Employee Work Schedule Guidelines**

Extension administrators, agents, county extension coordinators, and specialists are expected to fulfill their job responsibilities and, as professionals, maintain some flexibility of their work schedules. ACES supports the appropriate balance of work and personal life of all employees. The work schedules of professional educators in Extension are often dictated by the availability of clientele and the nature of educational programs. Extension administrators, agents, county extension coordinators, and specialists are expected to meet their work objectives and as professionals, are entrusted with the flexibility of balancing their work schedules. This is not a formal policy statement. Rather it is a philosophy or guideline for professionals to use in approaching their work. An assumption is made concerning this principle: a full-time Extension professional's responsibilities typically require more than 40 hours per week or portion thereof (for part-time professionals) and often at nonroutine work hours. Professional scheduling is not designed to equitably compensate (hour for hour) for work outside the normal 8 am – 5 pm workday or 40 hour work-week. Performance of professionals is a top priority and professional scheduling is intended to support and strengthen performance. It is the individual's responsibility of controlling one's schedule to meet the needs of clientele while achieving a balance in professional and personal time that is healthy for both the individual and the organization.

### **Definition of Professional Employee Work Scheduling**

Professional time scheduling reflects a fundamental characteristic of salaried, exempt positions which involve an organizational commitment to put in the hours needed to accomplish agreed upon work responsibilities, even if doing so means working hours outside the standard office work schedule. An Extension professional's responsibilities often require more than 40 hours per week and often at non-routine office hours. Professional scheduling should not be confused with compensatory time. Exempt employees are not eligible for compensatory time. These guidelines are not designed to equitably compensate (hour for hour) for work outside the normal workday. All employees are accountable to their immediate supervisors for their time and also for fulfilling the assigned job responsibilities. Extension administrators, agents, county extension coordinators, and specialists are accountable for their own time and also for fulfilling the assigned job responsibilities and completing objectives delineated in the chosen plans-of-work and extension team projects. Personal time off should be taken at the convenience of the organization and the individual. Professional courtesy requires that employees discuss this in advance with their immediate supervisor. It is the employee's responsibility to develop and maintain his/her professional calendar. Scheduling activities outside the normal work day is at the discretion of the employee. The key is fulfilling the objectives, the chosen

## **Chapter 4 - Organizational Expectations**

plans-of-work, and extension team projects and meeting expectations as identified in the job description. As a general guideline, System professionals working excessive hours at night and on weekends should schedule some personal time. However, this does not mean a professional must work a certain number of hours per day or week to be eligible to use professional scheduling. Supervisors will not negotiate with employees a specific number of days off in lieu of professional scheduling. Rather, professional scheduling is primarily the responsibility of the employee. Professionals should always keep support staff apprised of their work schedules. Professional courtesy requires that extension personnel communicate with their office team in advance when they will be taking time off by posting the time on their respective individual work email calendars. Controlling one's schedule to best meet the needs of clients, while achieving a balance in work and personal time, is not only healthy for the individual, it is healthy for Extension as an organization.

## **ARKANSAS**

Ron – please be aware that we do not have specific policies related to professional scheduling, therefore we have not sent anything.

Thanks

Rick Cartwright

# FLORIDA

## Professional Scheduling for UF/IFAS County Extension Faculty, CEDs, RSAs, and SSAs January 2018 From the Office of the Dean for Extension

### Introduction

County, Regional, and State Extension Faculty (herein referred to as “Agents,” including County Extension Directors) are *professionals* and therefore are exempt from the overtime provisions of the Fair Labor Standards Act. Agents are charged with extending the educational mission of the land-grant university to the people of Florida. Cooperative Extension is a service-driven profession, so Agents serve the public when and where they are. Often the availability of these clients and/or the nature of the programs do not coincide with an 8 AM to 5 PM workday. Consequently, Agents often work during hours other than 8 to 5 to best serve the public and the IFAS mission. Lunch hours, evenings, and weekends are often the most opportune time to provide educational programs. Agents need to be flexible to schedule these peak times to enable successful educational programming. However, it is also desirable that employees achieve a balance in work, home, and community life.

In general, Agents are given autonomy and flexibility to do their jobs. However, to most effectively manage the unit, supervisors need to be aware of an Agent's professional schedule especially as it deviates from regular work hours. In UF/IFAS Extension, the Agent is responsible for setting his/her own schedule and reporting it to the Agent's supervisor. Professional scheduling should also include *personal time*, because actually scheduling personal time is a major key to successful professional scheduling.

The term "work-life balance" has evolved to "work-life blend." In today's electronic age of smartphones and tablet computers, Agents are rarely completely separated from their work. Consequently, Agents cannot always consistently separate their work demands from their personal life; rather, Agents must often blend the two.

Due to the visible and public nature of extension work, professional scheduling should consider the public image impact of taking personal time at certain sensitive times such as Monday morning, Friday afternoon or days before or after holidays. Using professional scheduling during these times is not prohibited, but scheduling consideration should be taken even if one's work and personal balance logically support taking personal time (as opposed to vacation time) during these sensitive periods.

UF/IFAS Extension Administration believes professional scheduling can be sufficiently managed by Agents, particularly following mentoring by supervisors, experienced faculty, and the Agent's own experience.

## UF/IFAS Extension Professional Scheduling Policy

**Definition.** Professional scheduling is the responsibility of an Agent to control his/her schedule to best meet the needs of clients while achieving a balance between professional and personal time that is healthy for the organization and the individual. Professional scheduling refers to job duties fulfilled outside of normal work hours balanced with personal time taken during normal work hours.

**Principle.** Extension faculty are expected to meet their work objectives and, as professionals, are entrusted with the flexibility of balancing their work schedule.

**Situation.** The charge of the Extension Agent is to extend the educational mission of the land-grant university to the people of Florida. Professional Extension faculty positions are not defined or limited to a specified number of work hours per day or week. Extension is a service-oriented profession. Often, the availability of clients and/or nature of the program dictate the need for Extension employees to work during non-routine office hours. In addition, County Extension offices need to be sufficiently staffed to serve the public during established office hours per government expectations. Thus, an Extension professional's responsibilities typically take more than 40 hours per week and often occur during non-routine office hours. Professional Extension faculty do however accrue a generous number of vacation and sick leave days as well as a generous number of holidays.

**Characteristics of Professional Scheduling.** The following characteristics of professional scheduling are intended to give a sense of the nature of professional scheduling privileges this policy is intended to provide.

- When an Agent takes professional scheduling during normal work hours (8 AM to 5 PM), the Agent is on his/her own personal non-work time.
- When an Agent is working during what normally would be his/her own time outside of 8 AM to 5 PM, the Agent is at work.
- Professional scheduling is not designed to compensate for overtime hours or days worked, since Agents do not have defined work hours and are exempt from the overtime provisions of the Fair Labor Standards Act.
- Professional scheduling is not the same as "flex time" since Agents do not have defined work hours.
- Professional scheduling is not intended to reduce the total hours an individual works, but rather to make the hours they do work more productive and at the same time make the hours they are not working yield greater personal benefits.
- Professional scheduling is a privilege that can be revoked by the Agent's supervisor if abused or irresponsibly managed. Appeal of this decision can be made to the next level of supervision.
- Professional scheduling is not an issue tied to performance appraisal unless abuse results in unsatisfactory or poor program performance or improper personal conduct that disrupts the office professional environment.

- Professional scheduling is intended to allow individuals to control their schedules to best meet the needs of clients, while achieving a balance in work and personal time that is healthy for the individual and beneficial to UF/IFAS Extension.
- The responsibility of the County Extension Director (CED) is to support a work schedule environment that encourages healthy and well-balanced Extension faculty. Excessive work time commitments by an Agent, either imposed by the Agent or others, should be reviewed from a programmatic standpoint.

**Policy and Implementation.** In order to facilitate equitable and uniform professional scheduling system-wide, the following points serve as guides:

1. Agents are accountable for fulfilling their job responsibilities and commitments, and for maintaining their professional calendars. In so far as is practical, an Agent's calendar should detail daily work activities with regard to time and location and should be accessible to their colleagues and supervisor. If possible, a designated office support staff should always have a schedule of the activity and location of each professional in their immediate office.
2. Agents should keep office support staff apprised of their work schedule and should be reasonably responsive to phone calls, texts, and emails when working away from the office during regular office hours. Professional courtesy requires that Extension personnel communicate with their office/unit team in advance about their work schedule and when they will be taking vacation. The taking of sick leave should be communicated as timely as reasonably possible.
3. Professional scheduling should be designed at the mutual convenience of the organization and the individual. Professional scheduling is the responsibility of the Agent, to include advanced dialog with the immediate supervisor or the supervisor's designee. If the professional scheduling designated by an individual would negatively affect the unit's programs or function, the supervisor can deny that period of professional scheduling. If an employee still wants to take time off, vacation time must be used. Employees should adhere to normal procedures for requesting approved vacation time.
4. Professional scheduling does not negate the need to use vacation or sick leave consistent with university policy (and county policy, when applicable).
5. Typical use of professional scheduling involves a period of 4 hours or less. Agents may take up to 4 hours of professional scheduling on their own as long as they inform their supervisor or designee prior to taking the time off. Requests for periods of professional scheduling longer than 4 hours are permissible if based on extenuating circumstances (e.g., weekends of duty, periods of intensive work demand, weeks at camps, long conferences, extended travel, etc.) and approved by the individual's supervisor. The

appropriate amount of professional scheduling an Agent should take following predictable events such as camps and fairs may be addressed specifically.

6. Professional scheduling should be taken within a reasonable time period. The hours cannot be accumulated (i.e., “banked”) for future use.
7. A key consideration in professional scheduling is that the office or unit that the Agent functions within must, during all normal office hours, be able to sufficiently perform its programs and functions without undue burden on those left in the office due to the professional scheduling of one or more Agents in the office/unit.
8. Extension support staff within the office or unit should understand the concept of professional scheduling, be informed when Agents are using it to take time off, and develop an informed, professional, sensitive, and considerate response if asked where Agents are or what they are doing. The office should develop a plan that describes how to respond to walk-ins and phone calls intended for an Agent who is taking professional scheduling.
9. Different offices/units and individuals may have different programs and functions that make their respective ability to have flexible professional scheduling vary from the norm. Similar offices/units and individuals should have similar degrees of professional scheduling flexibility. Supervisors of similar offices/units and individuals should periodically share their practices with regard to professional scheduling oversight to assure that they are close to the norm of other similar offices/units.
10. At all times, Agents should carefully consider the public image impacts of their professional scheduling. For example, scheduling personal hours on Friday afternoon, Monday morning, or just before or after holidays should be carefully considered and justified.
11. If an Agent feels his/her management of professional scheduling is being questioned for inappropriate reasons, the Agent may contact the next level supervisor for consultation and guidance.

For County Extension Agents, there can sometimes be a conflict between the above professional scheduling philosophy and guidelines, rules, and/or regulations imposed by county government. In these cases, it is the responsibility of the CED and District Extension Director (DED) to clarify expectations with county government regarding the roles and responsibilities of Agents, the reason why professional scheduling is critical, and concerns regarding county and state policies relative to professional scheduling. The following excerpt from Florida State Statute 1004.37 is pertinent to this communication:

“Although county extension agents are jointly employed by the state universities and federal and county governments for the purposes of administration of the

cooperative extension service, *the personnel policies and procedures of the University of Florida or Florida Agricultural and Mechanical University*, depending on appointment, *will apply* except in those instances when federal legislation or the basic memorandum of understanding is applicable.”

# Professional Schedule Policy

University of Georgia

**file:///C:/Users/brown/AppData/Local/Temp/Professional%20Schedule%20Policy%20%E2%80%93%20CAES%20Intranet.htm**

## PROFESSIONAL EMPLOYEE WORK SCHEDULE GUIDELINES

Extension administrators, specialists, and agents are expected to meet their job responsibilities and, as professionals, are entrusted with the flexibility of their work schedules. It is desirable that employees achieve a balance in work, home, and community life. An assumption is made concerning this principle. An Extension professional's responsibilities typically require more than 40 hours per week and often at non-routine office hours. These guidelines are not designed to absolutely compensate for all hours worked outside the normal 8:00 am to 5:00 pm workday.

The purpose of these guidelines is to ensure that professional scheduling is implemented uniformly throughout Extension. The following should serve as a guide:

1. Extension administrators, specialists, and agents are accountable to their immediate supervisors for their time and also for fulfilling the assigned job responsibilities.
2. The University is not obligated by law to provide compensatory time to exempt employees. However, a supervisor may award compensatory time if it is determined that the situation warrants such an action.
3. Supervisors will not negotiate with employees a specific number of days or hours off for work done beyond the normal workday. Such a practice would violate the intent of these guidelines.

These guidelines are not intended to be a performance appraisal issue, but rather a guideline for the professional and his/her supervisor.

Note: These guidelines should be discussed by administrators with all supervisors and all Extension faculty (agents and specialists). They should also be discussed at appropriate training sessions.

Adopted by Extension Administrative Staff 10/10/95

Revised June, 2001

## **LOUISIANA**

Professional scheduling – the LSU AgCenter does not have a formal policy and “compensatory time” is not allowed. However, county chairs are expected to rearrange work schedules and otherwise provide flexibility in scheduling for agents provided that this does not gravitate to an hour for hour basis such that it mimics a compensatory time system; and that each agent does remain fully accountable such that the chair knows when the agent is working and when the agent is not.

# **NORTH CAROLINA**

## **NCCE COSS TIME MANAGEMENT**

Purpose- The charge of NC Cooperative Extension employees is to extend the educational mission of the land-grant universities in North Carolina to the people across the state. Often, the availability of these clients and/or nature of the programs dictate the need for Extension employees to work during non-routine office hours (i.e. lunch hours, evenings and/or weekends). Extension employees must be flexible to schedule these times to enable successful programming. It is also desirable that employees achieve a balance in work, home and community life.

All employee positions are classified as to their exempt or non-exempt status in accordance with the Fair Labor Standards Act (FLSA). The Exempt or Non-Exempt status of any particular employee must be determined on the basis of whether duties, responsibilities and salary meet the requirements for exemption.

County Extension offices need to be sufficiently staffed to serve the public during established office hours per government expectations. As such, supervisors are responsible for coordinating schedules of all employees to ensure effective office coverage.

### **COSS Employees** (County Operations Support Staff)

COSS employees are subject to the provisions of the Fair Labor Standards Act (FLSA) and are considered "subject" or "non-exempt" employees. COSS employees must keep a daily record of hours worked via Wolf Time. They receive compensatory time for weeks exceeding 40 working hours. The following principles apply to COSS time management:

- Supervisors should monitor hours worked on a weekly basis and recommend schedule alternatives to prevent overtime and burnout.
- Time management can be looked at as a form of flexible scheduling to avoid excessive hours over 40 when possible.
- All requests for time management should be requested and approved in advance.
- Time management for COSS employees is hour for hour and should be arranged in the same time reporting period. The work week for COSS employees starts at 12:01 a.m. on Saturday and runs until midnight Friday.

Implementation- North Carolina Cooperative Extension (NCCE) expects employees to do what must be done to enable successful programming while practicing time management.

In order to ensure that time management is implemented equitably through the organization, the following points should serve as a guide:

1. Extension employees are accountable for fulfilling their job responsibilities and commitments and for maintaining their professional online calendars. County Directors and support staff should have access to the online calendars, with details, for each employee in the office.
2. All employees should keep support staff apprised of their work schedules and should be reasonably responsive to phone calls, texts and emails when working away from the office during regular office hours. Professional courtesy requires that Extension personnel communicate with their office team in advance about their work schedule and when they will be taking vacation. The taking of sick leave should be communicated as timely as possible.
3. Time management should be taken at the mutual convenience of the organization and the individual. Time management is the responsibility of the employee with advanced agreement from their immediate supervisor or designee. If the request for time management would negatively affect the unit's program or function, the supervisor can deny that request.
4. Time management does not negate the need to use vacation or sick leave consistent with university policies.
5. All employees should understand the concept of time management, be informed when others are using it to take time off, and develop an informed, professional, sensitive and considerate response if asked where employees are or what they are doing. The office should develop a plan that describes how to respond to walk-ins and phone calls intended for employees who are using managed scheduling.
6. If an employee feels their requests for time management are continually being denied for inappropriate reasons, they are encouraged to contact the next level supervisor.

We recognize that there can sometimes be a conflict between the above time management program and rules/policies/regulations imposed by county government. In these cases, it is the responsibility of the County Extension Director and, when needed, District Extension Director to clarify the expectations with county government. It's important to demonstrate why time management is critical to the success of our employees.

## **NCCE EHRA MANAGED SCHEDULING**

Purpose- The charge of NC Cooperative Extension (NCCE) employees is to extend the educational mission of the land-grant universities in North Carolina to the people across the state. Often, the availability of these clients and/or nature of the programs dictate the need for Extension employees to work during non-routine office hours (i.e. lunch hours, evenings and/or weekends). Extension employees must be flexible to schedule these times to enable successful programming. It is also desirable that employees achieve a balance in work, home and community life.

Managed Scheduling is defined as the responsibility of controlling one's schedule to best meet the needs of clients while achieving a balance in professional and personal time that is healthy for the organization and the individual.

All employee positions are classified as to their exempt or non-exempt status in accordance with the Fair Labor Standards Act (FLSA). The Exempt or Non-Exempt status of any particular employee must be determined on the basis of whether duties, responsibilities and salary meet the requirements for exemption.

Extension administration, specialists and agents are expected to meet their work objectives and, as professionals, are entrusted with the flexibility of balancing their work schedules. However, County Extension offices need to be sufficiently staffed to serve the public during established office hours per government expectations. As such, supervisors are responsible for coordinating schedules of all employees to ensure effective office coverage.

Due to the visible and public nature of extension work, managed scheduling should consider the public image impact of taking personal time at certain sensitive times such as Monday morning, Friday afternoon or days before or after holidays. Using managed scheduling during these times is not prohibited, but scheduling consideration should be taken even if one's work and personal balance logically support taking personal time (as opposed to vacation time) during these sensitive periods.

### **EHRA Employees** (Exempt from the State Human Resources Act)

Due to the nature of their responsibilities as educators, Extension Agents and County Extension Directors are exempt from the Fair Labor Standards Act (FLSA). Therefore they do not get paid overtime or compensatory time for weeks exceeding 40 working hours. The following principles apply to Managed Scheduling:

- Managed scheduling is not designed to compensate hour for hour for time worked over 40 hours in a work week;
  - When an Agent takes managed scheduling during normal work hours (Monday to Friday, 8 AM to 5 PM) the Agent is on his/her own personal non-work time.
  - When an Agent is working during what would normally be his/her own time (outside of the normal working hours) the Agent is at work.

- All requests for managed scheduling should be requested and approved in advance;
- Managed scheduling is a privilege that can be revoked if abused. This is to be reviewed on a per person basis and not across the board in a county; and
- Managed scheduling is not an issue tied to performance appraisal unless abuse results in unsatisfactory or poor program performance or improper personal conduct.

Implementation- The North Carolina Cooperative Extension (NCCE) expects employees to do what must be done to enable successful programming while practicing managed scheduling.

In order to ensure that managed scheduling is implemented equitably through the organization, the following points should serve as a guide:

1. Extension employees are accountable for fulfilling their job responsibilities and commitments and for maintaining their professional online calendars. Office support staff and County Directors should have access to the online calendars with details for each employee in the office.
2. Agents should keep support staff apprised of their work schedules and should be reasonably responsive to phone calls, texts and emails when working away from the office during regular office hours. Professional courtesy requires that Extension personnel communicate with their office team in advance about their work schedule and when they will be taking vacation. The taking of sick leave should be communicated as timely as possible.
3. Managed scheduling should be taken at the mutual convenience of the organization and the individual. Managed scheduling is the responsibility of the employee with advanced agreement from their immediate supervisor or designee. If the managed scheduling request would negatively affect the unit's program or function, the supervisor can deny that period for managed scheduling.
4. Managed scheduling normally refers to periods of four hours or less. Requests for longer periods of time are permissible if based on extenuating circumstances (e.g. multiple weekends, week(s) at 4-H camps, etc.) and if approved by the supervisor in advance.
5. Managed scheduling does not negate the need to use vacation or sick leave consistent with university policies.
6. All employees should understand the concept of managed scheduling, be informed when others are using it to take time off, and develop an informed, professional, sensitive and considerate response if asked where employees are or what they are doing. The office should develop a plan that describes how to respond to walk-ins and phone calls intended for employees who are using managed scheduling.
7. If an employee feels their requests for managed scheduling are continually being denied for inappropriate reasons, they are encouraged to contact the next level supervisor.

We recognize that there can sometimes be a conflict between the above managed scheduling program and rules/policies/regulations imposed by county government. In these cases, it is the responsibility of the County Extension Director and, when needed, District Extension Director to clarify the expectations with county government. It's important to demonstrate why managed scheduling is critical to the success of our employees.

# OKLAHOMA

## 2018 Timeline for Managing Promotion in Professional Career Ladder System for Extension Educators

- Week of January 8 The Vice President, Dean, and Director and Associate Director, through the District Extension Directors, will initiate the promotion process through distribution of promotion information.
- February 1 Career Ladder training via Adobe Connect
- February 12 “Intent to Apply for Promotion” form submitted by Extension Educators to District Extension Directors.
- February 26 Due date for return of “Intent to Apply for Promotion” form from the District Extension Directors. District Directors will also send a copy of the returned form to the Staff and Program Development Office.
- April 6 (by 4:00 pm) Extension educators will submit a completed portfolio (one hard copy and an electronic copy on either a CD or flash drive) to the Staff and Program Development Office.
- April 23 - May 11 The Peer Review Committee will meet during this period to review/discuss all portfolios and the District Extension Directors will validate the portfolios.
- May 14 - June 8 The Associate Director will review the portfolios and make recommendations to the Vice President, Dean, and Director.
- June 11 - June 22 The Vice President, Dean and Director will make decisions regarding promotion of educators and will send notifications of status through the Associate Director and/or District Extension Directors or directly to the applicant.
- July 1 Promotion decisions are effective.

# Appendix I

## Checklist for Portfolio Format

**Failure to closely follow the specifications in this checklist will result in disqualification of the application.**

Submit a portfolio in a 3-ring notebook (appropriate size for number of pages in portfolio) **and** an electronic copy of the portfolio on either a CD or flash drive. The notebook portfolio and the electronic copy must both contain the following:

- 1) Title page (see Appendix V)\*
- 2) Table of Contents
- 3) Résumé (2 page maximum)
- 4) Narrative Format
  - A brief biographical paragraph should be included
  - All standards in each category and subcategory of achievement are to be addressed and appropriately identified in order listed
  - 20 page maximum (front of page only) summary of specific areas of criteria (Standards of Achievement)
  - Georgia Theme font, font size 12 minimum
  - 1½ line spacing – 1 inch margins on top, bottom, and sides
  - Numbered pages
  - Graphs, tables, and charts are acceptable to supplement written narrative
  - Do not use plastic sleeves
- 5) Documentation labeled and tabbed to identify standards\*\*
  - Maximum of one page/sheet of documentation per standard (can be front and back) of pages
  - Plastic sleeves may be used for holding documentation
  - One sleeve per standard, labeled and tabbed
- 6) Portfolio should be neat, organized, clean, and concise
- 7) Deliver or mail a hard copy of the completed portfolio, and either a CD or flash drive containing one PDF file (with the same pages/documents in the same format as the documents in the portfolio), to the Staff and Program Development Director's Office by due date

### NOTE:

\*The title page can be used on the cover of the portfolio notebook and as the first page of the portfolio. It must be included as the first page in the electronic copy.

\*\*Scanned versions of the supporting documentation may be used on the CD or flash drive.

## Appendix II

### Tips for Writing an Effective Career Ladder Portfolio

The challenge in writing a Career Ladder portfolio is to develop a concise, readable, and comprehensive document that explains your program to supervisors, peers, and others. Not all reviewers will know your clientele, resources, situation, or accomplishments like you do. A brief biographical paragraph should be included to describe your situation. The portfolio must help them understand the challenges you face, the work you have done, and the impact you have made. The portfolio should represent all years of service for the level of application and all standards must be addressed in the narrative section. If you have split appointments (i.e. Ag/4-H Youth Development or FCS/4-H Youth Development, etc.) be sure to include information about all of the program areas for which you are responsible.

When addressing the standards in the “Programming” section of the portfolio narrative, the presentation seems most effective when several exemplary programming efforts are highlighted which describe programming that fulfills all or most of the standards. The narrative should strive to describe the quality and program cohesiveness of the applicant’s programming over time and subject matter, as well as the effectiveness/impact of their programming (to the extent possible with examples). As needed, the applicant should consider supplementing these “case study” exemplary programs with some short information bytes to show the breadth of programming and fulfillment of each programming standard.

Prepare your portfolio using Georgia theme font, size 12 minimum, with 1½ line spacing and 1 inch margins at top, bottom, and sides of each page. Graphs, tables, and charts are acceptable if they are explained in the narrative. Carefully follow these and other style and formatting specifications described in these guidelines for preparing your portfolio. The written narrative cannot exceed 20 pages of summary information regarding the three specific areas of criteria – professionalism, programming, and professional development. Do not use plastic sleeves on narrative pages, however, sleeves may be used for holding documentation. Documentation must be in written format only -- no CD, DVD, or video tapes. Documentation sleeves are to be limited to no more than one sleeve per standard and each sleeve must be labeled and tabbed. The reviewers will be expecting a portfolio that is organized and formatted according to these guidelines and will be better able to evaluate your accomplishments if you follow them carefully. Do not include documentation that is not discussed in the narrative.

Avoid acronyms and abbreviations because peer reviewers from other program areas may be unfamiliar with specific elements of your program, and may not recognize acronyms or abbreviations that are familiar to you.

Use the first person and active voice wherever possible in describing your activities and accomplishments. Use of the word “I” is not only acceptable; it is preferable, as it identifies what you contributed. Make every word count and replace long words with short ones and technical terms with non-technical terms. Keep sentences and paragraphs short and to the point. Proofread carefully to minimize typographical errors.

Have an on-going dialogue with your supervisor and district staff on preparing your portfolio. Have your portfolio informally reviewed by other educators in your district in order to ensure that you have presented your accomplishments in a clear, concise writing style that addresses the criteria.

To help you learn more about the portfolios, you are highly encouraged to attend the career ladder training that will be offered.

# Appendix III

## 2018 CAREER LADDER INTENT TO APPLY FOR PROMOTION

Due Date to District Extension Director: February 12, 2018

Completed by Applicant:

Name \_\_\_\_\_

County \_\_\_\_\_ District \_\_\_\_\_

Current OCES Hire Date: \_\_\_\_\_

Prior OCES Service Dates: \_\_\_\_\_

Check the one which is applicable:

I intend to apply for Level II

I intend to apply for Level III

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

*(Applicant)*

I have notified my County Extension Director of my intent to apply (if applicable).

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

*(County Extension Director)*

=====

The following to be completed by District Extension Director:

Applicant meets minimum time in level: \_\_\_\_\_ YES \_\_\_\_\_ NO

Applicant meets approved degree requirements: \_\_\_\_\_ YES \_\_\_\_\_ NO

Applicant has not received an unsatisfactory or needs improvement rating or an equivalent rating for the past three years on performance appraisals: \_\_\_\_\_ YES \_\_\_\_\_ NO

The applicant is **eligible** / **not eligible** (circle one) for consideration for promotion to the designated level:

District Extension Director: \_\_\_\_\_ Date: \_\_\_\_\_

District Extension Director will return a copy of this completed form to the applicant and the Office of Staff and Program Development within ten (10) business days.

Due Date for Return from the District Extension Director: February 26, 2018

# TENNESSEE

## Statement on Professional Scheduling UT Extension October, 2015

The purpose of this statement is to clarify expectations of the work hours of Extension Agents and other exempt professional employees (including Specialists and Administrators). The issue is whether exempt staff are expected to work during the normal office hours in addition to evenings and weekends in conducting meetings and activities.

UT Extension supports an appropriate balance of work and personal life for all employees. Extension employees' work schedules are often dictated by the availability of clientele and the nature of educational programs. It is not unusual for exempt personnel to work during lunch hours, evenings and week-ends. While working these hours supports achieving work objectives, it is also important to maintain balance between work and personal time. For example, if exempt employees are working evenings or weekends to conduct meetings, it is acceptable for them to flex their time during the normal work day. However, clientele regularly visit the office or call during normal office hours, and employees should make every effort to be available during those hours.

The application of professional scheduling is a matter of judgment on the part of professional employees and should be reviewed with the respective supervisor. Professional scheduling is not designed to equitably compensate (hour for hour) for work outside normal office hours (i.e. compensatory time). As exempt employees, agents and other professional staff do not qualify for compensatory time. Although the 40-hour work week is the minimum expectation, agents, specialists, and administrators, have responsibilities that typically require more than 40 hours per week, some of which are scheduled at times other than the normal work day. Administrative support staff members are non-exempt employees and are eligible for compensatory time and are expected to work 40 hours per week during normal office hours.

Agents and other exempt employees should always keep supervisors, co-workers, and administrative support staff apprised of their work schedules. Professional courtesy requires that everyone communicate with their office team in advance when they will be on leave or away from the office during normal office hours. Controlling schedules to best meet the needs of clients, while achieving balance in work and personal time, is not only healthy for the individual, it is healthy for Extension as an organization.

County Directors and other supervisors should support professional scheduling by discussing expectations regarding office hours, work hours, communication plans, and leave requests to support work and family balance while also ensuring accountability for all employees. Professional scheduling absences are typically 1 to 3 hours and occur on an infrequent basis. Extended or lengthy absences should be requested and scheduled as leave.

## **Texas –**

no professional scheduling policies