District Staff Notes
February 2019

University of Kentucky
College of Agriculture,
Food and Environment
Cooperative Extension Service

Action needed

- Unconscious Bias Training – if you haven't completed the training, schedule in myUK Learning

Important dates

- February 20: Support Staff Evaluation 1:1 Meeting deadline
- February 25 and 27: Verified Volunteers Webinar
- February 26: Support Staff Evaluation Employee Signature deadline
- February 26 – 27: State Extension Council Meeting
- March 1: Support Staff Evaluation Supervisor Signature deadline
- March 1: Verified Volunteers is the new, and only vendor for background checks
- March 19 – 20: ESP Annual Meeting
- March 29: Client Protection Rick Management Webinar
- April 10: Approaches to Resolving Conflict Training
- April 15: Final Summary Budget to Fiscal Court deadline
- April 30: Deadline for D3 background checks for Client Protection
- May 14 – 16: KEHA State Meeting

Notes
- Open Records Requests
  - Send IMMEDIATELY to Stacy Miller, Tim West and Amy Spagnuolo
  - Counties should NEVER respond to an open records request

- The Open Records office will guide you if there are records to produce and they will review all records before they are sent to the requesting party. In cases involving District Board records, the request to UK for the records will be denied. At that point, it is up to the person making the request to contact the appropriate office to make the request (county attorney).
- Community Assessment Update
  - Pilot county reports are completed
  - Data is being compiled and analyzed
  - Team is on track to complete all county reports by end of May
  - All 120 reports will be released at the same time
- TEConomy ROI Study
  - Interviews took place on campus the last week of January
  - Additional interviews will take place by phone
  - The team is on track to deliver a report in late April
- Online Science Translation Outreach Masters
  - The University Senate Council should be approving soon, with the goal of starting classes in the fall
  - For those interested in the Science Translation and Outreach online masters: go ahead and take the GRE now, it will be required
- Client Protection Risk Management
  - Webinar March 29th
  - Sign up in KERS
- New background checks must be requested at least every 5 years and should be completed between January 1 and April 30 for all volunteers.
  - D1 & D2 – 2018
  - D3 – 2019
  - D4 – 2020
  - D5 & D7 – 2021
  - D6 – 2022
- Excess Accident Insurance
  - UK Risk Management Program Coverage
  - Primarily for youth events – 4-H youth, teen and adult counselors covered
  - Cannot be used for ANR, FCS, HORT adult focused events
  - Can pay by check – will not receive the coverage certificate until after payment is received, but will have coverage (per UK RM)
  - Other options:
    - American Income Life – lower coverage rates, but any program area can utilize
- State Extension Council Meeting: "Kentucky's Opioid Crisis"
  - February 26 – 27, Embassy Suites, Lexington
  - Encourage delegates to attend
- Penalty Mail
  - No advertising or business of fairs, livestock shows and livestock sales

- o No established organizations' and associations' business may be sent
  - o No personal messages, holiday greetings or farewells may be sent
  - o See full message in notes on slide 14 of PowerPoint
- UK Healthcare Promotional Items
  - o Counties can order promotional materials and educational handouts
  - o [Complete online order form](#)
  - o If you order, plan to pick up at Ag Distribution when contacts
- [ESP Annual Meeting](#)
  - o March 19 – 20
    - "Workshop on the Move" a tour of Bernheim Arboretum and Research Forest
    - Retiree and Life Member Meeting
    - Annual Business Meeting and Awards Program
    - In-service: Dr. Barbara Chamberlin, New Mexico State University, Extension Instructional Design and Educational Media Specialist
  - o Cost
    - $55 for Annual Meeting
    - $10 for Workshop on the Move
    - $35 for In-service
  - o Hotel
    - Hampton Inn of Bardstown
    - Rate: $109/night, single or double
    - Call 502-349-0100, code *ESP* for rate
- New Staff Mentor Program
  - o Similar to the Agent Mentor Program
  - o 6 month program that pairs a new/developing staff member with an experienced staff member
  - o Mentor acts as a resource with 2 in-person meetings and phone check-ins
  - o Currently looking for mentees – but act quickly as space is limited
  - o Those not selected can be nominated again in 6 months
  - o Contact your DD is interested
- [Research Survey Guidelines](#)
  - o Guiding principles:
    - Survey results must benefit Kentucky Cooperative Extension Service.
    - Purpose of survey, length of survey, instrument, methodology and how results will be used must be included in the survey request.
    - The UK Data Retention and Ownership Policy must be followed- http://www.research.uky.edu/ori/data.htm
    - College of Agriculture Food and Environment students should complete the "College of Agriculture Food and Environment Graduate Student Research Project Proposal" form and submit to Jeff Young, Director of County Operations (jyoung@uky.edu)
- Retirement Counseling TIAA-CREF/Fidelity

- o For UK sponsored retirement events – Official Travel / Day Trip
  - o For personal council within 2 years of retirement – Official Travel / Day Trip
  - o For all other personal retirement counseling – call / video conference / vacation leave
- Mental Health First Aid
  - o District Trainings
    - Eight hour training (either in one day or two day trainings)
    - Open to all agents
    - Limited to 30 participants per training
    - There will be a series for youth trainings as well
    - District contact will determine dates/times
- Mileage Rate Changes
  - o Updated in TRIP
    - $0.58/mile for business use
    - $0.20/mile for medical or moving purposes
    - $0.14/mile in service of charitable organizations
- KERS County Vehicle Mileage Logs
  - o Working on a new feature in KERS
  - o Log County Vehicle Mileage by driver
  - o District Directors will upload vehicle information by county
  - o KERS will create a summary of mileage driven for each vehicle by driver
- US Census
  - o Contact: Michelle L. Elison, Kentucky Partnership Specialist Philadelphia Regional Census Center
  - o Wants Extension to be involved in promoting to all residents to complete the Census
  - o More information will be available soon
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Extension Financial Operations Update
- Compliance
  - o Work continues on a consolidated financial operations manual
    - All existing guidelines have been brought into one document
    - Additional guidelines have been added where necessary
    - Standardized forms being developed (to be distributed in March):
      - Payment Voucher
      - Daily Deposit Log
      - Safe Log
  - o Cash Receiving Reminders
    - Create a cash receipt in carbon form (triplicate) for **ALL** income
      - One copy to the payer

- One copy kept with deposit documentation
- One copy kept in receipt book
    - Receipts should be used for on-site transactions, off-site transactions and for mailed payments
    - Restrictively endorse checks immediately upon receipt
        - "For Deposit Only"
    - Receipt forms must include:
        - The amount of the payment;
        - The mode of payment (e.g., cash or check);
        - Name of person making payment;
        - Purpose of payment;
        - Date of payment;
        - Sequential number;
        - Account payment applied to, if applicable; and
        - Signature of the employee receiving funds for written receipt
    - Limit access to cash and keep funds secure at all times
    - Restrict access to areas where cash is counted or handled to persons directly involved and restrict visibility by the public in areas where money is handled.
    - Never leave cash unattended. If an employee leaves his or her workstation for any reason, regardless of how briefly, appropriately secure cash in a locked place.
- QuickBooks Online
    - D2 has been trained and is currently using the system
        - Working to enter budgets and set-up accounts for each county
        - Once reconciliations are complete, conversion entries from old system will be entered by EFO team
    - D1 will be trained in February with "go live" on March 1
        - Feb 20 – Floyd County (Northeast Area)
        - Feb 25 – Montgomery County (Licking River Area)
    - See EFO website for other district trainings
    - Future trainings to be conducted solely by EFO team (with support from CPA firm as necessary)
        - Trainings include hands-on experience with practice exercises
        - Training is for fiscal contact, support staff and others as necessary (bookkeeper or EDB Treasurer)

- Plan to bring a laptop for each county being trained
  - With conversion to the new QBO system, counties **must** keep old electronic accounting records in old systems until those fiscal years are audited.
  - Counties converting from QBO **must** export all data from the old QBO client and keep until those fiscal years are audited.
  - Contact your auditor as necessary for any further guidance
  - Standardized reports will be scheduled and emailed to the appropriate county fiscal contact and district director on a regular basis (monthly, quarterly, annually)
    - Examples of scheduled reports include:
      - Budget vs. Actual
      - Statement of Net Assets (Balance Sheet)
      - Statement of Activities (Income Statement)
      - SPGE/UFIR Report
- Travel
  - County vehicle mileage logs
    - Work being done to finalize the process of entering mileage info
    - Logs will look very similar to personal vehicle logs
    - Logs will be printed, reviewed, signed locally and submitted to DD on a monthly basis
      - Goal is to move this to an electronic workflow process
    - Only counties with county owned vehicles will see this new screen
    - A spreadsheet will be distributed by the district office to collect info on current county owned vehicles
    - Info will be used to create initial inventory of vehicles which will be used in the new mileage log system
  - TRIP Reminders
    - Use comments to show how you traveled if no mileage is claimed
    - Submitting trips on same day as the last date of travel recorded in your trip report ends up being a request and has to get all the way through the system before the traveler can click save and send again for reimbursement
  - Budget

- Awaiting information from senior leadership at UK to make final budget decisions
- Numerous scenarios have been developed but some factors in the decision package are still unknown at this time
- Budget forms have been modified slightly to aid in the transfer of information into QBO
  - Office Operations section has been updated with QBO Chart of Accounts titles
- Due dates:
  - Provide rough draft to District Director for review by March 15
  - Provide final copy to District Board for signature no later than April 15
  - Provide final Summary Budget to Fiscal Court no later than April 15 ("Summary" tab from excel document)