Objectives

• To gain an understanding of the mission of the Extension Operations unit
• To better understand what the Extension Operations unit does and how it supports employees in the business of doing Extension
• To gain better clarity about operational expectations of employees
• To provide answers to some common questions about OSU Extension policies and procedures
Operations Unit

Operations Mission
Provide operational support for employees, clarification around policies and procedures, improve business efficiencies and responsiveness, and cooperate with college and university partners (units) to enhance operational effectiveness and improve competitiveness.

Areas of Emphasis:
• Personnel/Performance Management
• Resource Management
• Business process/Operations Management
• Policies
• Risk Management/Compliance
• Organizational Business Analysis

Extension.osu.edu/operations
Operations Unit

• We work with area leaders to provide information and training to share with county professionals
• We work with county stewards to assist with various roles (e.g., hiring stewards and fiscal stewards)
• We work with the assistant directors where program and business operations interface
• We work with central units in the college and across campus to increase efficiencies and effectiveness around the business of doing Extension
Operations Unit– Special OPS Team

Merged 5 regional office support personnel teams into a state-wide operations team
Key Resources and Support – County Fiscal and Admin Support

- Develop fiscal and admin job aids (IT purchases, travel, blanket T#s, approver checklists, hiring aids, etc.)
- Develop monthly dashboards for area leaders and 1st level approvers for easier data-driven decision making
- Create additional training and support for new office associates and those with fiscal responsibilities
- Create checklists for fiscal activities in counties
- Complete HRAs for counties
- Offer one-on-one support and consultations/coaching
Key Resources and Support – Area Leader Support

• Provide ongoing training and support for area leaders
  ✓ Monthly area leader meeting 3rd Wednesdays of the month
  ✓ Standing open office hours with Assistant Director of Operations to address timely and relevant self-identified topics from area leaders and sharing of resources and ideas
  ✓ Bi-weekly one-on-one conversations with Assistant Director of Operations
  ✓ Participation in quarterly administrative cabinet meetings
  ✓ Operations team support for hiring, performance reviews, training new personnel, and stewardship
Key Resources and Support – Stewardship Support

• Partner with Learning and Organizational Development to support and enhance the stewardship model
• Provide information and tools for area leaders to support stewardship efforts in their areas
• Design stewardship trainings (e.g., 1st level approver, hiring process stewards, budget proposal development)
• Provide support for county budget proposal submissions
• Hold annual operations retreats to determine next steps for training and necessary improvements
Key Resources and Support – Central Unit Liaison

- CFAES HR
- CFAES Finance
- Grants and Contracts
- OSU Legal
- PARE
- OCIO/CFAES IT
- Government Affairs
Example of Liaison Support – IT Transformation Project

- Represent Extension on the IT Transformation Project Taskforce
- Participate in the IT Cost Allocation Workgroup
- Hold bi-weekly meetings with OCIO
- Offer IT Transformation listening sessions
- Ongoing trouble-shooting and advocacy with OCIO and CFAES IT partners
- Advocate for 5 TME huddle spaces/production studios across the state through capital improvement dollars
Operational Expectations for Newer Personnel

What do you expect from us?
Expectations for Newer Personnel: Year 1

Read and become intimately familiar with your position description

- Know and understand your primary job responsibilities
- Ask questions if you do not understand what is included in the position description
- Understand that your performance is based on how well you perform your job duties

Beyond Year 1—Review your position description each year to ensure it hasn’t changed dramatically. If it has, work with your supervisor and the Operations unit to make modifications and submit to HR.
Expectations for Newer Personnel: Year 1

Become intimately familiar with the performance review process

• Review the form with your supervisor to know what you will be measured on for your annual performance appraisal
  • https://extops.cfaes.ohio-state.edu/performance-management/performance-reviews
• Ask questions about what any of it means if you are not clear about expectations
• Be thoughtful about your ANNUAL performance and professional development goals; be strategic and plan to grow and develop
• Post your annual goals where you can see them
• Work with your supervisor to find resources and opportunities to support your success
• Remember that a lot of Year 1 is about learning the job and goals should be more developmental as opposed to intermediate or longer term impact/outcomes

Beyond Year 1: Challenge yourself and set measurable and specific goals. Tie your goals to achieving measurable and meaningful results for your area of job responsibility.
Expectations for Newer Personnel: Year 1

Understand OSU’s merit process

The university’s compensation philosophy provides a market-based, performance-driven framework for compensation. All recommended salary increases must be based on performance, market and/or equity considerations. There are no across-the-board or automatic increases for non-union employees (i.e., Cost of living adjustments). The compensation process is to be used to inspire achievement and to reinforce performance and accountability.

For the entire policy process, see: https://cfaes.osu.edu/faculty-staff-resources/college-and-university-policies

Beyond Year 1: Seek to understand the differences between Did Not Meets, Mets, Often Exceeds, and Consistently Exceeds for your job category. Ask your supervisor what you can specifically be doing to rate higher in subsequent years.
Expectations for Newer Personnel: Year 1

Understand our promotion processes

You cannot demonstrate growth toward promotion expectations if you do not know what the expectations are. For new educators, simply read and become familiar with the A&P Guide to Promotion

Beyond Year 1- Work to perform at the next level for which you are seeking promotion. In other words, if you are an Educator 1, review the expectations for Educator II. If you are an Educator II, review the expectations for Educator III. If you have questions about these expectations, work with your supervisor and the appropriate administrative unit (operations for A&P and department chair for faculty).

The Faculty Guide for Promotion and Tenure is available at:

ASK QUESTIONS
Expectations for Newer Personnel: Year 1

Understand our policies and procedures

Ultimately, you are responsible for familiarizing yourself with OSU, CFAES, and OSU Extension policies.
Operating Procedures: Answers to Common Questions

Where do I find information about policies and procedures?

The majority of our policies are nested within university or college policy, such as vacation accumulation, conflict of interest, weather policies, etc.

The original policies are typically found at:
(OSU Policies) https://policies.osu.edu
(OSU HR Policies and Forms) https://hr.osu.edu/policies-forms
(CFAES Policies) https://cfaes.osu.edu/faculty-staff-resources/college-and-university-policies
Operating Procedures: Answers to Common Questions

Extension has additional standard operating procedures, guidelines, and job aids for adhering to and/or implementing university and college policies and procedures.

These are shared and available in two primary places:

OSU Extension Policy and Procedure Handbook
https://extension.osu.edu/policy-and-procedures-handbook

OSU Extension Operations website:
https://extops.cfaes.ohio-state.edu
Extension Fiscal Policies and Procedures

More information to be shared soon...

- Extension County Budget Policy
- Volunteer Standards of Behavior
What is professional scheduling?
Extension Educators will encounter periods that require long work days (more than 8 hours), and long work weeks (more than 5 days). Ohio State University Extension places value on employees maintaining a healthy life-work balance. To help maintain this balance, Extension professionals can use a scheduling strategy called Professional Scheduling that allows them to adjust work schedules. Professional Scheduling is not a strategy to compensate for every hour (hour for hour) of work outside the normal 40-hour workweek. Rather, it is intended to be used as a tool to help employees meet the needs of clientele while achieving harmony between professional and personal time. Employees should work with their supervisors to proactively plan for and use professional scheduling and effective communication with office staff is critical.

Standard operating procedures for this will be coming out in the next month.
Operating Procedures: Answers to Common Questions

What is overtime/comp time and how is it handled?

- Hourly employees cannot work more than 40 hours without being compensated through overtime or comp time.
- Overtime and comp time MUST be pre-approved in writing by a supervisor.
- The employee can identify if they prefer overtime or comp time for the extra hours worked.
- Supervisors should consider the available budget and the merit of the need BEFORE approving these requests.

If you have additional questions about this topic, contact your CFAES Human Resources professional.
How many EEETs or Peer Observations are required each year for educators?

- All educators MUST have 3-5 EEETs annually
- All educators MUST have 1-2 peer observations annually
Operating Procedures: Answers to Common Questions

How many performance and professional development goals are required annually?

• Everyone MUST have 3-5 performance goals
• Everyone MUST have 1-2 professional development goals
What if I disagree with my performance appraisal?

Everyone has the opportunity to provide comments in response to their annual performance appraisal. There is a text box available in the performance review form or comments can be shared electronically with your supervisor and HR.
How is Merit determined?

- Merit is calculated into the Annual Merit Compensation Process (AMCP)
- Your performance rating for the previous calendar year is identified by your supervisor and shared with the Operations unit.
- Our unit follows the university AMCP guidelines for distributing merit increases.
- We must use the AMCP aggregate identified by the university (typically 2.0% or 2.5% aggregate pool of dollars to distribute).
- These pools of dollars for each job classification are distributed in a standard approach by performance rating (Did not meet, Met, Often Exceeded, and Consistently Exceeded). Higher rating = higher merit increases.
Operating Procedures: Answers to Common Questions

How do I fill out travel forms, mileage reports, eRequests, ***?
If you don’t know where to start and/or can’t locate a form or do not know how to complete the form(s), please contact our Operations team member (fiscal or admin). We can help you navigate the system.

Or check our our job aids!
Questions?

What else would you like to know? How can we help?