

PROFESSIONAL CAREER LADDER SYSTEM GUIDELINES FOR COUNTY EXTENSION AGENTS

Texas A&M AgriLife Extension Service
Cooperative Extension Program

(Revised April 2023)

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I. INTRODUCTION

Texas A&M AgriLife Extension Service and Cooperative Extension Program agents extend the Texas A&M University System to the people of Texas through a variety of outreach educational programs. They perform a vital role in the triad of functions - teaching, research, and extension - which forms the basis of a Land Grant University System.

Extension agents work collaboratively with faculty, scientists, and other colleagues in the Texas A&M University System. Opportunities for collaboration exist with faculty in the various colleges of A&M System institutions and other universities outside of the system. Extension agents develop linkages with other agencies, organizations and institutions on the county, state, and national level.

In furthering the Extension mission, Extension agents are expected to implement innovative and progressive programs that meet clientele and community needs. By educating adults and providing youth with leadership development programs, extension agents have a direct and often immediate impact on the quality of life of individuals, families, and communities. This unique role distinguishes extension agents as a key local source of information and education.

The purpose of this career ladder is to provide a system for measuring and documenting the progress of extension agents in their profession and for rewarding their professional accomplishments.

Affirmative Action Statement: Texas A&M AgriLife Extension Service and Prairie View A&M Cooperative Extension Programs are equal opportunity employers. Equal opportunity shall be afforded within the Texas A&M AgriLife Extension Service and Prairie View A&M Cooperative Extension Program to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, genetic information, or veteran status.

II. PROMOTION CRITERIA

A. Initial Ranking for New Employees

The new employee ranking will be based upon the individual's previous professional experiences and education. The suggested ranking for Extension and CEP will be made by the County Director/District Extension Administrator, to the Extension County Operations office or to the appropriate CEP program leaders. They will make the final ranking recommendation for approval by the Director/CEP Administrator. The initial rank will be awarded and effective upon the starting date of employment. Please reference the "Professional Experience Equivalency Ratio Table" on page 18.

B. Promotion Criteria

For purposes of advancement, all four of the following indicators will be considered by Regional Leadership Teams and Extension/CEP Administration. There should be evidence of sustained performance indicators throughout the review period.

1. Program Development

Effective Program Development forms the foundation of an effective Extension career. An Agent's ability to engage in the program development process through the involvement of volunteers and stakeholders will largely determine the level of success in the county program and ultimately the career of the agent. Specifically, agents will be evaluated on their ability to fully engage the following four phases of program development.

- a. Planning
- b. Implementation
- c. Evaluations
- d. Interpretation

2. Program Resources, Volunteerism and Organizational Support

Program and organizational support depend greatly upon appropriate use and management of human and material resources to enhance the educational programming and program outcomes of the Texas A&M AgriLife Extension Service and the Cooperative Extension Program and to advance the organization as a whole.

- a. Volunteer Management and Engagement
- b. Other Human Resources
- c. Material Resources

3. Relationships and Teamwork

Establishing effective working relationships – with coworkers, colleagues, supervisors, volunteers, clientele, key community leaders, TAMUS partners, institutions of higher education, NIFA partners, county and state agencies and organizations, stakeholders and people in the political arena is critical to the success and enhancement of a visible and viable Extension Program. The identification, development, and involvement of teams, partners and collaborators are examples of the behavior, skills and actions necessary in the domain of cooperation and coordination.

- a. Internal Relationships
- b. External Relationships

4. Professional Development and Professionalism

The future of the Texas A&M AgriLife Extension Service and the Cooperative Extension Program depend upon the effectiveness of our employees. To maintain and enhance professional competence, county faculty members should participate in staff development efforts such as in-service training, graduate study, professional associations and externally-sponsored training.

- a. Professional Development
- b. Professionalism

C. Standards of Achievement for Professional Advancement

Program Development

1. Planning

Level I to II

- Organized, effective, and engaged Extension planning group(s) that support county plans and programs
- Provides leadership for determining specific issues in the county or designated area of responsibilities
- Has evidence of data to support relevance of issues and needs. Planning group meetings include involvement of resource persons (Extension Specialists, other agencies, etc.)

Level II to III

- Modified programs based on clientele needs.
- Planning groups members are volunteer representatives of the community and rotate regularly, meeting a minimum of three times per year.
- Involved with external or multi-county planning groups.
- Sought out and involved appropriate partners and collaborators to enhance the program planning process.
- Committees are representatives of the community and include diverse membership.

Level III-IV

- Planning groups meet beyond the minimum required number of meetings.
- Documentation of training provided to committee members including subject matter training, best practices for cash management, civil rights/affirmative action, and other needed training topics.
- Evidence of EPG member involvement in programming beyond basic participation and facilitation to include:
 - Committee members securing sponsors and resource people
 - Members speaking at events
 - Members coordinating facilities and volunteers.
- Evaluation results shared with EPG(s) and program modified as needed.

2. Implementation

Level I to II

- Program has clearly identified audience and targets appropriate population.
- Effectively used multiple teaching methods and learning activities to conduct educational programs.
- Effectively branded and marketed programs to target audience participation.
- Teaching methods are evident in county programs by Extension Agent.

Level II to III

- Adapted and effectively used multiple teaching methods and learning activities to conduct educational programs as appropriate to address target audience needs.
- Effective branded and marketed programs to targeted audiences that will include the use of multiple media outlets and methods.

Level III to IV

- Significant subject matter teaching by Extension agent is evident in programs.
- Teaching methods include an appropriate mix of traditional, electronic, and other methods to reach targeted clientele.
- Adaptive teaching methods based on feedback by clientele.
- Markets all outreach programs effectively, including newsletters, media, and electronic methods as appropriate.

3. Evaluation

Level I to II

- Developed a plan to evaluate the quality and effectiveness of programs.
- Evaluated methods implemented were appropriate and effective in measuring the type of change expected.
- Collected and analyzed data that was valid and reliable in measuring program impacts.

Level II to III

- Used evaluation data to improve teaching methods, effectiveness, and quality, with input from planning groups.
- Evaluation of Outreach Plans is expected and a minimum of customer satisfaction.
- Evaluation results shared with EPG(s) and program modified as needed.

Level III to IV

- Multiple data collection techniques were utilized in the evaluation of the programs.
- Results measure significant impacts including economic data or public value of extension programs.
- Evidence of program modification based on evaluation results.

4. Interpretation

Level I to II

- In-Depth program summaries were developed and shared appropriately with planning groups and other stakeholders.
- Effective commissioners court interpretation and communication.

Level II to III

- Effectively branded and interpreted Extension programs and programming efforts to key stakeholders, including commissioner's courts, school boards, state/federal elected officials, and other as appropriate, using variety of strategies and methods.
- Utilize volunteers and EPG(s) members in interpretation of Extension programs.
- Developed high quality interpretation documents.

Level III to IV

- Formal interpretation event(s) to commissioner's court, state/federal elected officials, others as appropriate.
- Implemented a coordinated strategy to communicate value of Extension programs with other agents, staff, and partners as appropriate.

5. Volunteerism

Level I to II

- Evidence of volunteers involved in program planning process.
- Utilization of results demonstration and applied research cooperators. Recruitment, involvement, management and recognition of appropriate volunteers in program area.
- 4-H volunteer involvement is adequate to lead and grow a 4-H program representative of the needs of the county.

Level II to III

- Utilization of volunteers to teach clientele is evident.
- Volunteers are appropriate for size and complexity of the county. Adequate numbers of volunteers are involved in program areas where volunteer support is beneficial.

Level III to IV

- Master Volunteers, Mentors, and Certified Volunteers provide direct clientele support and education.
- Evidence of volunteer leadership in programs. Volunteers taking ownership of programs with input and guidance from Extension agent.
- Volunteers and mentors utilized in teaching other volunteers.
- Recognition of volunteers beyond internal recognition events; (i.e. mass/social media, recognition within peer volunteer group such hospital, school administration, etc.).

** Volunteer base should represent the needs of the county in appropriate areas, included but not limited to TEEA, 4-H, Ag Cooperators, Master Volunteers, etc.

6. Human Resources (as applicable to county situation)

Level I to II

- Effectively managed paid staff, including county staff, program staff or other staff as an integral part of the Extension program.
- Provided effective orientation, training, feedback and evaluation of county support staff as appropriate.
- Cooperates with other staff in recruiting, interviewing and hiring staff.
- Followed all appropriate policies, rules and guidelines as they relate to hiring and supervision of paid staff.

Level II to III

- Successful in securing additional human resources as needed to grow the county program.

Level III to IV

- Partners with other organization or departments to maximize human capital for program support.

7. Material Resources

Level I to II

- Completed a written annual review of support group accounts for all external groups who raise funds. Corrective actions taken as appropriate.
- Developed and maintained effective working relationships with sponsors and donors in securing, maintaining and managing support and resources for Extension educational programs.

Level II to III

- Actively and effectively supported fee-based programming.
- Effectively accrued and managed funds in a manner that enhanced program quality and outreach, including funds from county budgets, donations and program funds maintained by external groups.

Level III to IV

- Utilization of volunteers in securing additional material resources.
- Pursue and secure grant opportunities.
- Innovative methods to enhance fee-based programming, sponsorships and development of material resources.

8. Relationship and Teamwork (Internal and External)

Level I to II

- Evidence of developing relationships with External partners within the county.
- Developed and maintained effective professional relationships with coworkers.
- Demonstrated ability to cooperate effectively as a team member at local, district levels through collaborative programming efforts, participation on committees/task forces, and other tasks and duties as assigned.
- Worked cooperatively with coworkers on local job responsibilities, including 4-H program management, interdisciplinary programming, LAB, youth boards, PACs, 4-H cluster programming, multi-county planning groups, interpretation efforts, office support, joint reports, and related duties that require teamwork. Fostered a work environment that encourages positive staff interaction and relationships.
- Fostered joint education and program delivery activities with Extension agents, specialists and personnel of other groups and agencies to positively impact diverse clientele in the county and in multicounty activities.

- Collaborated effectively with Extension organizations and support groups such as 4-H clubs, master volunteer groups, TEEA clubs, and study groups, etc., in a manner that enhanced program outcomes.
- Establish networks, coalitions, and collaborations, which further the work of Extension in serving clientele.
- Established active and positive relationships with Commissioners Court(s), state and federal representatives, and representatives of local groups, organizations, and other agencies.
- Actively partnered with local, county stakeholders, agencies, organizations, clubs, private businesses, agribusinesses, financial institutions, school groups etc., to develop and enhance educational programs and responses to effectively address local needs.
- Demonstrated leadership in team building skills and service as a team leader when appropriate.

Level II to III

- Fostered an environment of effective cooperation with coworkers CEP/AgriLife Extension and research faculty as well as other Texas A&M AgriLife and Texas A&M System representatives. Provides leadership to promote team building within staff and committees.
- Demonstrated multi-disciplinary, multicultural and/or multi-county program efforts.
- Provided leadership, motivation, and guidance which enhanced staff interaction and relationships.
- Establish and sustain networks, coalitions, and collaborations, which further the work of Extension in serving clientele.
- Established and maintained active and positive relationships with Commissioners Court(s), state and federal representatives, and representatives of local groups, organizations, and other agencies.
- Provided the necessary leadership to create partnerships and/or collaboration with external groups to plan programs to meet current and future needs.
- Actively cooperated and supported employee recruitment and onboarding processes such as mentoring, First Step, internships, career days, and related team-oriented activities and processes.
- Demonstrated ability to cooperate effectively as a team member at local, district, state, and national levels through collaborative programming efforts, participation on committees/task forces, and other tasks and duties as assigned.

- Actively partnered with local, county, state, and national/federal stakeholders, agencies, organizations, clubs, private businesses, agribusinesses, financial institutions, school groups etc., to develop and enhance educational programs and responses to effectively address local needs.

Level III to IV

- Established and fostered joint education and program delivery activities with Extension agents, specialists and personnel of other groups and agencies to positively impact diverse clientele in the county and in multicounty activities.
- Documentation of frequent office conferences, including total staff involvement in programs, budgeting, office management, interpretation, and other key aspects.
- Establish, sustain and expand networks, coalitions, and collaborations, which further the work of Extension in serving clientele.
- Community involvement at a level that leads to wide visibility and respect for Extension.
- Recognized as an asset to the community by key leaders such as Chamber of Commerce, business and industry leaders, school districts, etc.
- Demonstrated expansion of programs to new audiences as a result of external relationships. Examples: expansion of 4-H clubs, increased volunteerism, and new target communities and other audiences.

9. Professional Development Professionalism

Level I to II

- Membership and participation in appropriate professional association(s).
- Serves on district Extension committees and task forces.
- Involved with local non-Extension committees at the county level.
- Made appropriate scholarly contributions associated with publications, fact sheets, newsletters, web pages, and handbooks, etc.
- Participated in appropriate professional development opportunities to maintain subject competencies.

Level II to III

- Maintained involvement or served in leadership roles on district Extension committees and task forces.
- Expanded committee involvement to include regional or state Extension and professional association committees.

- Shared innovative program strategies to colleagues through development and distribution of publications, fact sheets, newsletters, informal/formal presentations at district, regional, state or national levels.

Level III to IV

- Maintained involvement or served in leadership roles on regional or state Extension committees and task forces.
- Participated in a state or national professional development training or professional association.
- Worked with Extension leadership to provide leadership and plan district, regional or state professional development trainings.
- Served as an educator or resource for district, regional, state or national professional development opportunities. This includes Extension, professional associations, or non- Extension professional development.
- Demonstrated competencies and served as a resource in appropriate subject matter and program areas.
- Master's Degree completed

III. EXTENSION PROFESSIONAL CAREER LADDER

A. Professional Progression

During the annual performance review of each Extension agent's program accomplishments and professional development, the agent will receive advice and counsel on readiness to submit a promotion packet for advancement consideration based on consultation of his/her supervisor and appropriate RPL/CEP Program Leader. The supervisor and the Regional Program Leader/CEP Program Leader should counsel the agent on promotion preparation by connecting performance appraisal with career ladder criteria. This is an on-going process.

Professional Experience Required on or before September 10.

Level I to II Minimum of 5 years of professional experience **and** 3 years as a Level I

Level II to III Minimum of 8 years of professional experience **and** 3 years as a Level II with a Master's Degree

OR

Level II to III Minimum of 10 years of professional experience **and** 5 years as a Level II without a Master's Degree.

Level III to IV Minimum of 15 years of professional experience **and** 3 years as a Level III with a Master's Degree.

Please reference the "Professional Experience Equivalency Ratio" Table on page 18.

Promotion to a higher level will be based on the agent's accomplishments since his or her last promotion in rank. An agent must remain in a professional rank for three (3) years or more before submitting a promotion packet for consideration of promotion to the next level. The minimum years of professional experience in the current rank will be determined as of September 10 in the year the promotion packet is being submitted for review.

All agents interested in being considered for promotion must submit an "Intent to Apply" form to their immediate supervisor. (See Appendix IV) The immediate supervisor will inform the appropriate RPL/CEP Program Leader of agents indicating an interest in promotion for that year. The Regional Leadership Team will provide a consensus vote for or against promotion, along with feedback and comments for consideration to the Associate Director for County Operations. Candidates for advancement will be reviewed based on the criteria stated in these guidelines.

The District Extension Administrator/CEP Program Leader will submit Career Ladder packets to the Associate Director for County Operations/CEP Administration. The Associate Director/CEP Administration will review the recommendations of the Regional Leadership Team/CEP Program Leader and provide a final recommendation to the Senior Administrative Team/CEP Administration. Candidates who are recommended for promotion will then be notified of their Career Ladder promotion status.

The Director/CEP Administrator will notify agents on their promotion status.

Upon promotion to the next level, an agent will receive promotion status and salary increases as indicated, effective September 10th.

Annual Promotional Increments:

Level I to II	\$3,600
Level II to III	\$4,800
Level III to IV	\$6,000

- B. **The Role of the District Extension Administrator/County Extension Director/CEP Program**
- The DEA/CED and/or CEP Program Leader is to work with Agents in determining their readiness to submit a promotion packet. Promotion will be based on the program effectiveness and success of Agent performance. This will include a thorough assessment of Program Summaries and Agent Achievement Reports, in addition to other reports and measures of county program effectiveness. The DEA/CED/CEP Program Leader will consult with the appropriate RPL prior to Performance Appraisal conferences for specific programmatic input that will help guide the discussion about promotion readiness.

C. The Role of Regional Program Leader/CEP Program Leader

The RPL/CEP Program Leader works with agents during the program planning process to establish effective educational programs with adequate evaluation building toward Career Ladder expectations for the next level. Serving as a resource, it is expected that the interaction with the agent is over a period of time that is adequate to ensure the agent's program impacts meet the established criteria and are well documented. The RPL/CEP Program Leader reviews the program impacts in program summaries as the promotion packet is prepared. Review of summaries should be early enough for edits to be made prior to submission of promotion packet, all edits must be complete and certified no later than February 1.

The Regional Leadership Team/CEP Program Leader will identify strengths and weaknesses of each agent's promotion packet and indicate level of support for promotion. These comments will be included in the promotion packet for consideration by Extension/CEP Administration.

D. The Role of Level III and IV Agents

Level III and IV agents serve as a mentor to agents in their region to help prepare them for a successful promotion process by: informally critiquing their information; being involved in training on promotion packet preparation; and/or serving as a mentor for an individual(s) throughout their promotion process. It is the responsibility of the agent seeking promotion to identify and secure assistance from a mentor agent by February 1 of the promotion year. Mentors should have the promotion packet for review by this date.

IV Appeals Procedure for Professional Progression

- A. Extension agents have the right to present grievances concerning progression through the professional career ladder. Basis for an appeal exists when, in the opinion of the Extension agent, one or more of the following has occurred:
 - 1. There was a failure to follow the prescribed procedures.
 - 2. There was a failure to adhere to the established criteria for determining progression in rank.
 - 3. There was a discovery of significant new evidence in support of the Extension agent related to academic credentials, length of professional service, performance appraisal information and overall achievement, productivity, and/or effectiveness.
- B. Extension agents having concerns or grievances regarding other aspects of the professional career ladder are encouraged to seek resolution of those concerns through established supervisory channels prior to filing a written appeal. If the matter cannot be resolved, the agent may seek a hearing by an appeals committee.
- C. The written appeal shall include the basis for the appeal and must contain any supporting evidence and/or documentation to be considered. Written appeals concerning denial of progression in rank must be filed with the appropriate AgriLife Extension/CEP Administrator within 20 working days of notification of denial.

- D. The appeals committee(s) shall be appointed by the Director/Administrator to review and/or hear individual appeals regarding progression in rank. The committee(s) will contain not less than three and not more than five County Extension Agents.
- E. The appellant may request to meet with the appeals committee to present his/her case. Such a request shall be included in the written appeal. If the appellant elects to be represented by an attorney, he or she will notify the Director's office in writing at least five working days before the date the appeal is to be heard. The agent will be solely responsible for any legal expenses incurred in connection with such representation.
- F. The appeals committee shall judge the merits of the appeal and forward its written recommendation with supporting documentation to the Director/Administrator for final action within 20 working days from the end of the appeal hearing.
- G. The appropriate AgriLife Extension/CEP Administrator will notify the agent in writing of acceptance or rejection of the appeal committee recommendation. Notification will be made within 60 working days of receipt of the written appeal.

Questions about this procedure should be referred to the Extension Human Resources Office at (979) 314.3408.

Appendix I
TIMELINE FOR PROMOTION PREPARATION IN PROFESSIONAL
CAREER LADDER SYSTEM FOR COUNTY EXTENSION AGENTS

Selected for Employment:

Supervisor recommends career ladder status when submitting Approval to Hire form.

When Employed:

Supervisor (DEA/CED) discusses the career ladder process and its importance. Review criteria. Develop a professional development plan. Professional Development plan is shared with RPL/CEP Program Leader.

RPL/Program Coordinator/CEP Program Leader works annually with agents on program impacts that will warrant future promotion consideration during program planning.

2 years prior to submission:

Annually, DEA/CED/RPL reviews promotion packet content to counsel agent in areas of improvement and to establish a realistic timeline to consider promotion.

Appendix I-A

TIMELINE FOR MANAGING PROMOTION IN PROFESSIONAL CAREER LADDER SYSTEM FOR COUNTY EXTENSION AGENTS*

October 1:	Annual Program Summaries due to the appropriate supervisor.
Sept- Dec:	Discussion with supervisor about intent to apply.
November:	The Director for Texas A&M AgriLife Extension Service and the Administrator for CEP initiates promotion process through distribution of promotion information.
By January 1:	“Intent to Apply” form and draft copy of promotion packet due from Extension agent to the DEA/CED or CEP Program Leader. “Intent to Apply” form includes the names of Level III and IV agents who are “mentoring” the agent to prepare the promotion packet. By this date, the candidate will have worked with RPL and Level III and IV agents to prepare draft promotion packet.
February 1:	Promotion packet must be sent to Level III and IV Mentor Agent for review.
February 1:	If Program Summaries are in need of minor edits, those need to be made by February 1 and returned to the supervisor for final approval/certification.
April 1:	Extension agent submits their final Agent Promotion Packet to the DEA/CED or CEP Program Leader. DEA/CED will forward the Agent Promotion Packet(s) to the Regional Leadership Team.
By May 10:	Regional Leadership Team/CEP reviews promotion packets of candidates for advancement, identifies strengths/weaknesses, records vote and justification, and returns packets to supervising DEA/CED or CEP Program Leader.
May 15:	District Extension Administrator/Program Leader CEP submits all promotion packets to the Associate Director, County Operations or Cooperative Extension Program administration office. The Regional comments should be included as part of the promotion packet.
June 1:	The Director/Administrator for CEP will ask Associate Directors to review promotion packets and make recommendations on promotion based on feedback from Regional Leadership Team/CEP Program Leader, and content of the packet.
July 1:	The Director/Administrator for CEP to make decisions regarding promotion of County Extension Agents.
July:	County Extension Agents are notified of promotion status.
September 1:	Promotion decision becomes effective.

* Specific timeline and guidelines for promotion for the current year will be announced and distributed each year in October.

APPENDIX II

PROFESSIONAL EXPERIENCE EQUIVALENCY RATIO TABLE GUIDELINES

For Completing Equivalency Ratio Form and for Providing Accompanying Statements

1. In identifying degree(s) earned, please indicate specific degree, e.g. BS, BA, BBA, LLB, MA, MS, MBA, M.Ed., Ph.D. or Ed.D.
2. Each professional level employee should become familiar with the Professional Experience Equivalency Ratio Table and provide accurate information on previous professional employment so that the personnel officer, using the equivalency ratio table, can apply the appropriate equivalency ratio factor. If an employee feels his/her professional experience in a specific job is not adequately represented in the table, he/she may attach a very brief summary of those job responsibilities to enable the personnel officer to apply the most appropriate equivalency ratio factor. The completed form must be signed by the employee and forwarded to the immediate supervisor. If requested, the employee will be expected to provide documentation for actual dates of previous employment.
3. Professional employment shall be defined as: full-time employment in a job or position normally requiring a college or university graduate.
4. Only full-time professional employment, after completion of the bachelor's degree, shall be considered. Employment as a graduate assistant, research, teaching or Extension shall be considered as full-time employment.
5. Supervisors are to review the completed equivalency ratio forms. Should there be questions concerning the professional aspect of an employee's previously held position, the supervisor is to confer with the employee to ascertain the recommended ER factor. The completed form shall be signed by the appropriate supervisor and forwarded to the Texas A&M AgriLife Extension Service Human Resources Office for final review and appropriate action. Any unusual professional employment considered to be relevant, but not adequately covered in the professional experience equivalency ratio table, requires supervisory documentation as to why such employment should be counted.
6. The official equivalency ratio time is established by the Texas A&M AgriLife Extension Service Human Resource office.

Professional Experience Equivalency Ratio Table¹

One year of Cooperative Extension Service (other states or Extension Service, USDA)	=	One year Texas A&M AgriLife Extension Service
One year teaching vocational agriculture or vocational family and consumer sciences	=	.8 of one year Texas A&M AgriLife Extension Service
One year full-time teaching or research in specialty field	=	.8 of one year Texas A&M AgriLife Extension Service
One year full-time research experience not in subject matter field	=	.5 of one year Texas A&M AgriLife Extension Service
One year of other full-time teaching experience	=	.5 of one year Texas A&M AgriLife Extension Service
One year relevant industrial or commercial experience, e.g. agribusiness (professional employment), public service companies (professional work in relevant subject matter areas)	=	.5 of one year Texas A&M AgriLife Extension Service
One year of research or teaching experience as a graduate student	=	.3 of one year Texas A&M AgriLife Extension Service
One year managing a commercial farm or ranch enterprise	=	.5 of one year Texas A&M AgriLife Extension Service
One year of relevant foreign service	=	.4 of one year Texas A&M AgriLife Extension Service

Agent's professional experience equivalency ratio must be confirmed by Human Resources

¹ *Professional Employment Following Completion of Bachelor's Degree*

Appendix III

GUIDELINES FOR ASSEMBLING PROMOTION PACKET

Use Times New Roman font, size 11 or 12, with single spaced text and 1-inch margins at the top, bottom and sides of each numbered page.

All materials should be placed in a manila file folder, clipped, and organized by sections as indicated below and formatted as a pdf.

1. Title Page - “Texas A&M AgriLife Extension Service/Cooperative Extension Program Career Ladder Promotion Packet”

- I. Name
- II. Current Level:
Date of appointment to current level:
- III. Proposed Level:
- IV. Total years in Extension work with Texas A&M AgriLife Extension Service/CEP: Official
Professional Experience Equivalency Ratio:
Total years of professional experience:
(By September 10th of submission year)
- V. Current Position Title:
Years in Present Position:
County(ies)/District:

2. Table of Contents (serves as a checklist and content guidelines)

Section I: Curriculum Vitae (*See Appendix V for Curriculum Vitae Recommended Format.*)

The curriculum vitae should reflect the activities/accomplishment of the agent’s entire career and should list vitae achievements within heading in date order with most recent listed first. Specify year of accomplishment listed.

- I. Personal Background
(Name, Title, Location)
- II. Academic Background
(Education: including institutions, locations, dates and degrees awarded. Certifications)
- III. Professional and Academic Appointments
(Former and present professional employment with years and dates of service, most recent first.)

IV. Program and Organizational Support:

- a. Major Educational Programs Presentations by Agent:
- b. Extension Educational Resources Developed and Adapted:
- c. Material Resources:
- d. Human Resources:
- e. Result Demonstrations and Research: (ANR and IPM Agents Only):
- f. Mas Media and Social Media Contributions:
- g. Newsletter Contributions:
- h. Internal (Extension) Committee Involvement:
- i. External Committee and Partnership Involvement:
- j. Professional Development:
- k. Professional Organizations and Service:
- l. Awards and Recognition: Internal and External:

Section II: Program Summary Content Page

- See Appendix VI for example and explanation. This summary should be the first page(s) of Section III.

Program Summary Accomplishments

- Annual program summaries from top 3 program areas (maximum) conducted during the past 5 years.
- Annual program summaries are summaries submitted annually at the conclusion of a program plan to DEA's/CED's/RPL's. Can be in-depth or outreach programs.
- Up to 15 annual program summaries can be submitted. (Top 3 programs X 5 years of program summaries for each program).
- Each program summary has a maximum length of 2 pages.
- Examples:
 - If an agent has had 5 years of annual program summaries from each of the top 3 programs selected, a total of 15 annual program summaries will be submitted. (Maximum of 30 pages submitted – 2 pages per summary X 3 programs X 5 years).
 - If an agent has 5 years of program summaries for 1st program selected, 3 years of programs summaries for 2nd program selected, and 1 annual program summary for 3rd program selected, a total of 9 annual program summaries will be submitted. (18 pages submitted).

Section III: Agent Achievement Reports

- Agent Achievement Report is the document that supports the Performance Appraisal System.
- Maximum of 5 previous year Agent Achievement Reports
- Maximum length of 4 pages for each annual Agent Achievement Plan submitted. (Maximum of 20 pages – 4 pages per AAP X 5 years)
- Agents must request through their DEA an additional 10 days after performance appraisal if they wish to edit the Agent Achievement Report prior to it being posted online. Once online, no revisions are allowed.

Section IV: Administrative Forms (to be added as packet proceeds through review. Extension Agent should not include blank sheets in packet)

- Intent to Apply for Promotion (Extension agent includes)
- Regional Leadership Team Recommendation (DEA includes)

Appendix IV
INTENT TO APPLY FOR PROMOTION

Due with draft copy of promotion packet to District Extension Administrator/CEP Program Leader by January 1:
Completed by County Extension Agent:

NAME: _____

COUNTY: _____

DISTRICT: _____

CURRENT LEVEL: _____

DATE OF APPOINTMENT TO CURRENT LEVEL: _____

YEARS IN LEVEL AS OF SEPTEMBER 10, OF CURRENT YEAR: _____

REQUESTING PROMOTION TO LEVEL: _____

NAMES OF LEVEL III or IV AGENTS (1-3 AGENTS) TO MENTOR CEA DURING CAREER LADDER PROCESS: _____

Completed by Supervisor:

CANDIDATE MEETS MINIMUM TIME IN LEVEL: _____ YES _____ NO
(attach documentation reflecting exception to time in level)

Supervisor certifies that the following documents are official documents that meet Career Ladder Guidelines.
ANNUAL ACHIEVEMENT REPORT: _____ YES

AGENT PROGRAM SUMMARIES-IN-DEPTH OR OUTREACH: _____ YES

The following signatures verify eligibility for consideration for promotion to the designated level. AgriLife agents will be signed by DEA/CED and CEP agents signed by CEP Program Leader only.

County Extension Director: (Printed) _____

County Extension Director: (Signed) _____

Date: _____

District Extension Administrator: (Printed) _____

District Extension Administrator: (Signed) _____

Date: _____

CEP Program Leader: (Printed) _____

CEP Program Leader: (Signed) _____

Date: _____

Appendix V

Curriculum Vitae Recommended Format

(The Curriculum Vitae should reflect the activities/accomplishment of the agent's entire career. The following format is a recommended format only. Other CV formats are acceptable.)

I. Personal background – (Name, Title, Location)

Karen Roberson
County Extension Agent – Family and Community Health
Texas A&M AgriLife Extension Service – Somewhere County
kroberson@ag.tamu.edu
[325-555-5423](tel:325-555-5423)

II. Academic Background:

(Education: Including institutions, locations, dates and degrees awarded.)

M.S. Agriculture Science, Texas A&M Kingsville, Kingsville, Texas (2019)

B.S. Agricultural Communications, Texas Tech University, Lubbock, Texas (1997)

Associate of Arts, Blinn College, Brenham, Texas (1995)

III. Professional and Academic Appointments:

(Former and present professional employment with years and dates of service, most recent first.)

Texas A&M AgriLife Extension Service – Dallas County - Dallas, Texas
County Extension Agent – Family & Community Health
January 2009 – Present

Texas A&M AgriLife Extension Service – Taylor County - Abilene, Texas
County Extension Agent – Family & Community Health
March 2000 - January 2009

Texas A&M AgriLife Extension Service – Erath County - Stephenville, Texas
Assistant County Extension Agent – Agriculture and Natural Resources
June 1998 – March 2000

San Angelo ISD – San Angelo, Texas
Agriculture Science Teacher
January 1996 - June 1998

IV. Program and Organizational Support

a. Major Educational Program Presentations by Agent: Face-to-Face and Virtual:

(Include level, presentation title, group reached, role and date.)

Summary of Educational Program Presentations given as an Extension Agent

Type of Presentation	Total
County Level	
District/Regional Level	
State/National Level	

(* Provide list of presentations with most current first. See suggested chart format and examples below.)

Level	Presentation Title	Audience	Year
County	“Feral Hog Control Options”	Beef & Forage Producers	2023
District	“Volunteer Recruitment Strategies”	Agents	2022
State	4-H Summit, “4-H Club Activities for Members”	Agents	2021
County	“Conditioning Boot Wool for Show”	4-H Families	2020
County	4-H Record Book Training	4-H Families	2022
County	“Hunt for Dinner Tonight”	Community Families	2017
Regional	Healthy Texas Youth Ambassador Toolkit Training	HTYA and Agents	2018
County	“Step Up Scale Down” Series	Community Members	2017

b. Extension Educational Resources Developed and Adapted:

(Use citation showing title, role, and date; identify whether original or adaptation. Include publications, fact sheets, interpretation documents, reports, etc. Include efforts related to thesis/dissertation.)

Summary of Educational Resources Developed as an Extension Agent

Type of Educational Resource	Total
Publications	
Fact Sheets	
Interpretation Pieces	
PowerPoint Presentations	
Other Reports	
Educational Videos	
Thesis/Dissertation	

(* Provide list of educational resources developed with most current first. See suggested chart format and examples below.)

Resource Title & Type (Publications, Fact Sheets, Interpretation Pieces, Other Reports, Thesis/Dissertation)	Role (Creator, Submitting Agent, Adaptor)	Descriptor (Original or Adaptation)	Year (Numerical or Annual)
Lamb Project FAQ One Pager	Creator	Original	2023
Restricted Pesticides One Pager	Contributor	Adaptation	2023
“How to Take a Soil Sample” YouTube Video	Videographer	Original	2022
Heart Health Fact Sheet	Creator	Original	2015
AgriLife Interpretation PowerPoint Presentation	Creator	Original	2017-2022
Annual In-Depth Summaries	Creator	Original	Annual
Evaluation Forms for Programs	Adaptor	Adaptation	Annual
Agricultural Increment Report	Submitting Agent	Original	2023
“FSA Drought Assistance Program” Online Survey	Creator	Original	2022
Preserving the Harvest Fact Sheets	Creator	Original	2021
Tri-fold Flyer for 4-H Club Fundraiser	Creator	Original	2014
United Way Future Leaders Brochure	Creator	Original	2014

c. Material Resources:

Summary of Material Resources secured as an Extension Agent

Material Resource Type	Total Dollar Amount
Sponsorships, Donations, and Fundraisers	\$
Grants	\$
Fee-Based Programs	\$
Other	\$

(* Provide list of material resources secured with most current first. See suggested chart format and examples below.)

Amount in dollars	Item description	Year
\$2,500	ABC Tractor Company donation for Multi County Program	2023
\$1500	Private Applicator Trainings – Fee-Based	2019-Present
\$2500	BLT Grant	2020-Present
\$2000	4-H Achievement Awards Donations	2018-Present
\$1200	ABC County Crops Tour Sponsorships	2016-Present
\$13,000	XYZ County Stock Show Concession Stand Fundraiser	2010-Present
\$800	Food Protection Management Trainings – Fee-Based	2022
\$1,000	PAC Contribution for Scholarship	2022
\$500	Texas 4-H Foundation Grant	2021

d. Human Resources:

(Supervision of support staff, interns, etc. Mentoring of new agents, FirstStep, Assistant Agent host county, etc.)

(* Provide list of supervision roles with most current first. See suggested chart format and examples below.)

Role (Supervisor/Mentor/Trainer Agent)	Description	Year
Supervisor	County Support Staff	2001-Present
Supervisor	Summer Intern	2023
Trainer Agent	Assistant AG/NR Agent	2022
Mentor	First Step Agent	2021

e. Result Demonstrations and Research: (ANR and IPM agents only)

(* Provide list of result demonstrations/research trials conducted with most current first. See suggested chart format and examples below.)

Title	Year
“House Fly Bait Comparisons” with Dr. Sonja Swiger	2023
“External Parasite Control in Beef Cattle” with Dr. Jason Smith	2023
“Herbicide Trial on Turfgrass” with Landowner	2023
“Earthkind Rose Trial” with Master Gardeners	2021-2022
“Cotton Variety Trial” with FiberMax	2020

f. Mass Media and Social Media Contributions:

(Include news articles, radio programs, TV programs, podcasts, interviews, and social media.)

(* Provide list of mass and social media contributions with most current first. See suggested chart format and examples below.)

Outlet	Title	Year
KABC TV	Monthly Lunch Program, TV interview	2023
ABC News Paper	“ABC Program” promotional news article	2022
KABC Radio	“Gardening in a Drought” radio session	2021
Podcast	Home Sweet Home Podcast	2020 - Present
KSLR	Weekly Radio Program	2019-Present
Social Media	ABC County FCH Social Media Posts	2017-Present
Social Media	ABC County 4-H Social Media Posts	2016-Present

g. Newsletter Contributions:

(* Provide list of newsletters contributions with most current first. See suggested chart format and examples below.)

Title	Target Audience	Year
“2022 Upcoming Educational Programs” Annual Program Outlook	New Landowners	2022
“4-H Monthly Reminders”	4-H Families	2020-Present
“Health Watch with BLT”	General Public	2019
ABC County “4-H Weekly Tid-Bit”	4-H Families	2018
FCH Quarterly Newsletters	General Public	2015-2018

h. Internal (Extension) Committee Involvement:

(Include level, committee, role, and year. External: Collaborations with organizations, industry, etc. indicating role/relationship.)

(* Provide list of internal committee involvement with most current first. See suggested chart format and examples below.)

Level	Committee	Role	Year
State	Texas 4-H Outdoor Challenge Committee	Member	2023
Regional	Regional Small Ruminant Committee	Chairman	2023
District	District 4-H Food Challenge Committee	Chairman	2019-Present
County	ABC County Beef and Forage Committee	Agent/Advisor	2014-Present
County	XYZ County Family & Community Health Committee	Agent/Advisor	2000-Present
County	4-H PAC	Agent	2014-Present
State	Agent Focus Group	Agent	2019
State	TEAFCS Executive Board	1 st V.P.	2020-2022
Regional	North Region Think Tank Committee	Agent	2017-2020

i. External Committee and Partnership Involvement:

(Collaborations with organizations, agencies, industry partners. Include level, relationships, role, and year.)

(* Provide list of external committee involvement with most current first. See suggested chart format and examples below.)

Level	Committee/Partnership	Role	Year
National	Texas Tech University College of Human Sciences Advisory Council	Co-Chairman	2022-Present
County	Hospital Diabetes Education Committee	Member	2019
Regional			
County	ABC County Soil and Water Conservation District Committee	Member	2018-Present
Local	XZY ISD School Health Advisory Council	Member	2017-2019
Local	County Livestock Show Board	Advisor	2014-2016

j. Professional Development:

(Professional development activities (regional/district/state/international conferences. List also advanced degree related courses.)

(* Provide list of professional development involvement with most current first. See suggested chart format and examples below.)

Level (District, Regional, State, National)	Activity	Year
State	Beef Cattle Short Course	2010- Present
Regional	Faculty Conference	Annually
District	TCAAA Professional Development Retreat	Annually
Graduate School	Master's Degree Course Work	2009

k. Professional Organizations and Service:

(Include memberships, leadership roles, and other service.)

(* Provide list of professional organizations and service group involvement with most current first. See suggested chart format and examples below.)

Professional Organizations	Year
Area Go Texan Committee	2015- Present
Texas County Agricultural Agents Association	2010- Present
Texas Extension Association of Family and Consumer Sciences – District Director	2022-2023
ABC Livestock Show Species Chair	2023
Regional Livestock Workshop Species Chair	2022
Texas Association of Extension 4-H Youth Development Professionals – State Treasurer	2016-2018
Chamber of Commerce Board of Directors	2015-Present
ABC ISD School Board Member	2016-Present

I. Awards and Recognition: Internal and External

(Include award title and year. Include AgriLife Extension, professional association, and community awards received.)

Organization	Award	Year
Texas A&M AgriLife Extension	Salute to Excellence Award	2023
Texas 4-H Program	4-H Meritorious Service Award	2022
TCAAA	Communication Award, Computer Generated Graphic	2021
TEA-FCS	Community Partnership Team Award	2019
Chamber of Commerce	Woman of the Year Award	2012
Texas A&M AgriLife Extension	Certificate of Completion, Program Excellence Academy	2010

Appendix VI

EXAMPLE (To precede Program Summary Section)

Program Summary Content Page

Major Program Area 1: (Ex. Health and Wellness, Beef Cattle Production, Youth Leadership)

Summaries Representing Program Area 1:

- i. (Title and Year)
- ii. (Title and Year)
- iii. (Title and Year)
- iv. (Title and Year)
- v. (Title and Year)_

Major Program Area 2: (Title of program area)

Summaries Representing Program Area 2:

- a. (Title and Year)
- vi. (Title and Year)
- vii. (Title and Year)
- viii. (Title and Year)
- ix. (Title and Year)_

Major Program Area 3: (Title of program area)

Summaries Representing Program Area 3:

- a. (Title and Year)
- x. (Title and Year)
- xi. (Title and Year)
- xii. (Title and Year)
- xiii. (Title and Year)

Appendix VII

Career Ladder Promotion Checklist (✓=required)

Agent: _____, Title: _____ County: _____ Level Advancement: _____	Career Ladder Advancement		
<u>Program Planning: (page 4 of Guidelines)</u>	I to II	II to III	III to IV
Organized, effective, and engaged Extension Planning Group(s) (EPG) within the county	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Provides leadership for determining specific issues	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Has evidence of data to support relevance of issues and needs	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Planning meetings include involvement of resource persons	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Modified programs based on clientele needs is evident	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Planning groups meet a minimum of 3 times/year	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Planning group members rotate regularly (1-3 years)	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Agent involved with external or multi-county planning groups	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Sought out and involved appropriate partners/collaborators	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Committee members are diverse and are representative of the county	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Planning groups meet more than three times/year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Planned and documented trainings including subj. matter, CR, AA, Risk and Cash Mgmt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
EPG members actively teach, seek sponsors, resource people, coordinate/facilitate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Formal evals. conducted, analyzed, shared and utilized in planning upcoming events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
<u>Program Implementation: (page 5 of Guidelines)</u>	Career Level Advancement		
	I to II	II to III	III to IV
Audience and county population clearly identified and targeted	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Effectively utilizes multiple teaching methods and learning activities	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Programs are branded and marketed to target audience	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Teaching methods by Extension agent is evident	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Regularly adapts and utilizes multiple teaching methods and learning activities	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Effective branding and marketed programs utilizing multiple media outlets/methods	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Significant and relevant subject matter teaching is evident by the Ext. agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Teaching methods include traditional, electronic, and any mix to reach target audience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Adaptive/modified teaching methods utilized based on clientele feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Markets all outreach education programs. Effectively, utilizing all possible methods/venues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓

<u>Program Evaluation: (page 5 – 6 of Guidelines)</u>	Career Level Advancement		
	I to II	II to III	III to IV
Develop plan to evaluate the quality/effectiveness of program	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Utilized appropriate evaluation methods	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Effectively measures the type of clientele change expected	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Collects and analyzes evaluation data	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Uses evaluation data to improve teaching methods, effectiveness and quality	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Utilizes customer satisfaction evaluations in outreach programming	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Shares evaluation data with planning groups and seeks input	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Utilizes multiple data collection techniques appropriate with target audience	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Results measure significant impact	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Results measure economic data and/or public value	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Evidence of program modifications to address weak or insufficient results	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓

<u>Program Interpretation: (page 6 of Guidelines)</u>	Career Level Advancement		
	I to II	II to III	III to IV
Program Summaries were <u>developed</u> and <u>shared</u> with planning groups	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Effective commissioners' court interpretations	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Effective branded and interpreted Extension programs and programming efforts	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Interprets to state/county/federal elected/appointed officials, ISDs and others	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Utilizes Extension support groups and volunteers to help interpret	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Develops high quality interpretation documents	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Utilizes social media, including county webpage for interpretation	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Formal interpretation events to county/state/elected officials and others	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Implements strategies to communicate the value of Extension to agents/staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓

Notes: _____

<u>Volunteerism: (page 6-7 of Guidelines)</u>	Career Level Advancement		
	I to II	II to III	III to IV
Evidence of volunteer involvement in program planning	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
(Ag agents) Utilization of result demonstration and applied research cooperators	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Utilization of method demonstration resource persons from external sources	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Evidence of recruitment, training, management and recognition	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
4-H volunteer involvement is adequate to lead, expand and grow the 4-H program	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Utilizing volunteers to teach on a regular basis is evident	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Volunteers are appropriate for size and complexity of the county	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Adequate numbers of volunteers are involved as needed and where beneficial	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Master volunteers, mentors, and certified volunteers provide direct support and education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Evidence of volunteer leadership and program ownership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Volunteers and mentors utilized in train-the-trainer type events (speakers' bureau)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Recognition includes the use of mass media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Recognition includes targeting external partners/collaborations that use Extension volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓

<u>Human Resources: (page 7 of Guidelines)</u>	Career Level Advancement		
	I to II	II to III	III to IV
Effectively managed paid county staff, part-time staff and paid interns	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Provided effective orientation, training, feedback and evaluations of county staff	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Cooperates with other staff in recruiting, interviewing and hiring staff	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Followed appropriate policies, rules and guidelines relating to hiring and supervision	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Successful in securing other human resources as needed to grow the county program	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Partners with external organizations or departments to maximize human capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓

Notes: _____

<u>Material Resources: (page 8 of Guidelines)</u>	Career Level Advancement		
	I to II	II to III	III to IV
Evidence of developing relationships with External partners within the county	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Developed and maintained effective professional relationships with coworkers	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Completed a written annual review of support group accounts	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Corrective actions taken as appropriate – follows Best Management guidelines	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Developed and maintained effective working relationship with sponsors and donors	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Secured/managed external resources in support of county/multicounty programming	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Actively and effectively supported fee-based programming	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Effectively accrued and managed funds from co. budget, donations and Extension support groups	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Utilized volunteers in securing additional material and financial resources	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Pursued and secured grant opportunities, and follows through w/ required reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓
Utilized innovative methods to enhance fee-based programming and sponsorships	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ✓

<u>Relationships and Teamwork: (page 8-10 of Guidelines)</u> <i>(external and internal efforts)</i>	Career Level Advancement		
	I to II	II to III	III to IV
Cooperated effectively as team members at the local and district Extension events	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Collaborated in planning, marketing, facilitating and programming efforts as needed	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Participated in committees and task forces, and carried out various duties as assigned	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Effectively served as an advisor to county LAB, PACs, TFs, 4-H groups and 4-H clubs	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Fostered a work environment that encourages positive staff interaction and relationships	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Fostered joint education activities with other agents, specialist and resource persons	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Collaborated w/ Ext. organized groups to enhance program delivery and outcomes	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Established networks/coalitions/collaborations to further our work in serving clientele	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Established an active/positive relationship w/ Commissioners in support of Extension programs	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Partnered w/external groups to develop/enhance Extension programs to address local issues	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓
Demonstrated leadership in team building skills and serves as a team Leader as needed	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓	<input checked="" type="checkbox"/> ✓

<u>Relationships and Teamwork: (page 8-10 of Guidelines)</u> <i>(Internal and External efforts)</i>	Career Level Advancement		
	I to II	II to III	III to IV
Effectively cooperates w/ CEP/Agrilife Ext. coworkers, specialist, RPLs and admin.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provides leadership to promote team-building within staff, TEEA, 4-H and Ext. PACs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demonstrated multi-disciplinary, multi-cultural and/or multi-co. program efforts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provided leadership/motivation/guidance to enhance staff interaction and relationships	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sustained networks, coalitions and collaborations which further the work of Extension	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Maintained active/positive relationships with local, state and federal elected officials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Maintained active/positive relationships w/ local groups, organizations and agencies	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provided leadership to create partnerships and/or collaborations with external groups	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Actively sought out and supported employee recruitment for Extension positions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supported onboarding efforts - mentoring, First Step, internships and career days	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demonstrated the ability to cooperate effectively as a team member at all Extension levels	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Actively partnered with external groups to co-sponsor Extension education programs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Established/fostered joint education programs with agents, specialist and external partners	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Joint educational programs positively impacted diverse clientele attending county events	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Documented office conferences – discuss budgets, programming, upcoming events, staff management and other	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Established, sustained and expanded networks, coalitions and collaborations to further the work of Extension	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Involved in community activities at all levels leading giving visibility and respect for Extension	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Agent is recognized as an asset and key leader in the community	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Served as a resource person for ISD, civic groups, businesses, industry, church, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Demonstrated expansion effort to new audiences	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Notes: _____

Professional Development/Professionalism: (page 10-11 of Guidelines)	Career Level Advancement		
	I to II	II to III	III to IV
Membership and participations in appropriate professional association(s)	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Serves on district-level Extension committees and task forces	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Involved with local non-Extension committees at the county level	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Made appropriate/valid scholarly contributions in newsletters, factsheets and publications	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Made appropriate/valid scholarly contributions in webpages and social media	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Participated in appropriate professional development opportunities to increase skills	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Maintain involvement and served in leadership roles on District Extension committees and task forces	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Involved in regional and state Extension committees and professional associations committees	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Shared innovative program strategies with Extension colleagues – publications, PowerPoints, exhibits, etc.	<input type="checkbox"/>	<input type="checkbox"/> ✓	<input type="checkbox"/> ✓
Master's Degree completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Maintain involvement and served in leadership roles on regional/state Extension Committees and task forces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Participated in state/national professional development training and professional associations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Provided leadership with administrators to plan district, regional and state professional development trainings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Served as an educator or resource person for district, regional and state professional development trainings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓
Demonstrated competencies and served as a resource in certain subject matter areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ✓

Notes:

Appendix VIII
Regional Leadership Team/CEP Program Leader Review
CEA Promotion Packet Review

Name _____ District _____ County _____
 Current Level _____ Proposed Level _____
 Degree Level _____ Years of professional experience by Sept 10 _____

I. Program Development		
Planning	Strengths	Weaknesses
	Recommendations:	
Implementation	Strengths	Weaknesses
	Recommendations:	
Evaluation	Strengths	Weaknesses
	Recommendations:	

Interpretation	Strengths	Weaknesses
	Recommendations:	
I. Organizational Support		
Volunteerism	Strengths	Weaknesses
	Recommendations:	
Human & Material Resources	Strengths	Weaknesses
	Recommendations:	

II. Relationships and Teamwork	
Relationships & Teamwork	<div>Strengths</div> <div>Weaknesses</div>
	Recommendations:
IV. Professionalism and Professional Development	
Professionalism & Professional Development	<div>Strengths</div> <div>Weaknesses</div>
	Recommendations:

Recommend Promotion? ____ Yes ____ No

Signed by Regional Leadership Team or CEP Program Leader:

Signature	Yes	No	Signature	Yes	No