Handbook for Agents
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Introduction

Well-developed communication and people skills, as well as a thorough understanding of the system are critical to the success of an Extension Agent. To help foster and develop these skills, UT Extension has developed a competency-based system process, called EXCELS, which stands for Extension Competency E-learning for Success. EXCELS will identify professional development needs and the e-learning resources to strengthen soft skill competencies.

Background

As part of UT Extension’s 2010-2020 Strategic Plan, an initiative team was launched in 2015 to establish a competency-based system to work toward the overall Strategic Plan goal of investing in UT Extension’s human capital and becoming the employer of choice to attract and retain a diverse and highly qualified workforce. The team was charged with identifying core competencies for entry level Extension Agent positions and developing a framework for subject matter competencies in the three program areas of Agriculture and Natural Resources, Family and Consumer Sciences, and 4-H Youth Development.

To address the first part of the charge to identify core competencies, the team focused on soft skills and people skills, and initially identified seven competency areas and over 100 competencies. After conducting a Delphi study involving 36 agents and county directors, competencies were refined to 73 recommended competencies.

After finalizing the list of competencies, team members worked with Skillsoft, an industry leader in assessment and online training development, to develop seven custom assessments that measure an agent’s competency level in the seven soft skill competency areas. The assessments are based on real life Extension scenarios and were piloted with 15 Extension Agents with two to five years of experience with UT Extension.

The assessment results will be used to help new agents, their Regional Program Leader, and their County Director to develop a customized professional development plan to address areas of need in the agent’s first year on the job. Beginning in September 2017, new agents with less than one year of experience will be expected to complete the assessments and participate in the competency-based system process.
Purpose

The purpose of EXCELS is professional development, not for performance review, hiring, or disciplinary procedures. Assessments will only be taken once. Achieving a proficient score is not the ultimate goal, so assessments do not be retaken. The goal is to initiate the conversation between the new agent and their Regional Program Leader to provide more customized professional development suggestions and opportunities.

Achieving a score of less than 80% does not indicate failure in a competency area, but rather an area for growth and professional development.

Research: Delphi Study

A Delphi study was chosen to solicit feedback and input from nominated county employees. These nominees were selected from county directors and county agents across the three regions and from the three program areas: 4-H, ANR and FCS.

The Delphi Technique is a method for soliciting ideas from a nominated group of experts using a series of questionnaires (Hsu & Sandford, 2007; Ludwig, 1997). The Delphi Technique lends itself to a project like this because it allows for collecting information from a diverse group of participants who cover a wide geographical area and it is cost-effective (Mayfield, Wingenbach, & Chalmers, 2005).

This method was selected for this project for several reasons including:

1. The importance of including a diverse sample of respondents with the objective of soliciting input from county representatives with diverse job expectations and from across the state
2. The ability to use a method that would facilitate the collection of many different needs and would also allow the nominated experts to refine and select the top training issues for county directors from their unique perspective and
3. The ability to remain anonymous from others.
Participants completed three rounds of surveys. For Round One, participants were asked to review a list of competencies that had been identified as critical skills that agents need to be successful. These competencies related to these major themes:

1. Professionalism
2. Communication Skills
3. Leadership Skills
4. Organizational Systems
5. Partnerships
6. Educational Design
7. Volunteers

Round One was a list of over 100 competencies which participants were asked to rank on a scale of one to nine by importance. Over 100 competencies were identified for these major groups: Professionalism, Communication Skills, Leadership Skills, Organizational Systems, Partnerships, Educational Design and Volunteers.

Round Two was an open-ended question asking participants to identify the top five competencies that they believed agents need to be successful.

Round Three had the top five competencies identified by participants. Participants were asked to choose the top two most critical competencies that agents needed training to be successful.

The top three most important competencies for agents identified by participants were:
- Professionalism
- Communication Skills/Interpersonal Skills
- Subject Matter Knowledge

The seven competency areas and 73 competencies emerged as the key areas be addressed for staff development.
Competencies and Competency Areas

Professionalism

These competencies describe the qualities, skills, and behaviors of a professional, including ethics, time management, business etiquette, and professional appearance.

1. Models ethical principles.
2. Behaves in an honest and fair manner.
3. Exhibits business etiquette.
4. Presents a professional and neat appearance.
5. Chooses apparel and accessories that are sensible, professional and appropriate for the occasion.
6. Responds promptly and effectively to the needs/requests of clients, colleagues, partners and volunteers.
7. Demonstrates dependability and reliability for consistent results.
8. Establishes a comfortable, fair and efficient work environment that avoids office gossip and politics.
9. Manages time and resources effectively.
10. Handles high-volume workload making adjustments to achieve results.
11. Handles challenging assignments effectively and efficiently to achieve the best possible results.
12. Balances conflicting work demands.
Communication & Interpersonal Skills

These competencies describe the ability to interact verbally and nonverbally with others in a way that promotes respect, inclusion and harmony among clientele and colleagues. This includes the knowledge, skills and ability to communicate effectively and resolve conflict and to foster an engaging, respectful, and tactful environment.

1. Writes clearly and concisely.
2. Writes effectively for target audience.
3. Uses technology to communicate effectively.
4. Encourages audience feedback.
5. Interacts with clientele and co-workers in a respectful and tactful manner.
7. Reacts in a non-defensive manner.
8. Disagrees respectfully.
9. Seeks understanding to resolve conflict.
Leadership

These competencies are comprised of behavioral attitudes that provide inspiration and guidance to others, foster teamwork, and engaged and enable others to accomplish goals with enthusiasm and integrity.

1. Demonstrates consistency in words and actions.
2. Recognizes and values teamwork.
3. Holds self and others accountable for achieving results.
4. Demonstrates openness and flexibility to different work styles and strengths.
5. Demonstrates a commitment to diversity and inclusivity.
6. Applies logic and critical thinking skills to solve problems.
7. Recognizes achievements of others.
8. Directs and guides people and processes to achieve goals.
9. Delegates effectively with appropriate follow-up.
10. Finds win-win solutions that foster and respect relationships.
11. Collaborates and shares leadership when appropriate.
12. Leads groups to accomplish tasks.
13. Makes decisions appropriate to authority level.
Educational Design

These competencies describe how to plan, market, conduct, and evaluate effective programs based on local needs and target audiences.

1. Conducts needs assessments of clients, community, volunteers and the organization.
2. Plans timely programs appropriate for audience with demonstrated outcomes.
3. Demonstrates ability to market programs.
4. Creates a welcoming environment conducive to learning and teaching.
5. Facilitates learning using various teaching techniques.
6. Understands learning styles (adult and youth) and adapts programs appropriately.
7. Conducts evaluation of programs for program improvement, accountability and impact.
8. Works with timelines, organization structures and budgets for successful completion of projects.
10. Translates high level strategies into practical implementation strategies.
Partnerships

These are the competencies necessary to establish and maintain a cooperative, collaborative relationship that exists between UT-TSU Extension and associated individuals, officials, and stakeholders.

1. Welcomes and invites participation of partners.
2. Strengthens existing partnerships with individuals, officials, stakeholders, agencies and organizations.
3. Partners with individuals, officials, stakeholders, agencies and organizations to address emerging needs.
4. Works cooperatively with partners and is sensitive to organization differences.
5. Supports partnerships by fulfilling own role and assisting partners when needed.
6. Generates and/or recognizes new program opportunities and collaboration.
7. Engages partners for multidisciplinary educational programs and opportunities.
Organizational Systems

These competencies describe the organizational framework, procedures, values, information flow, and assigned responsibilities of positions at all levels.

1. Understands Extension’s vision, mission and purpose.
2. Understands Extension’s organizational structure at all levels—County, Regional, State and National.
3. Understands the policies of Extension relevant to day-to-day operations.
4. Understands policies and guidelines specific to your area(s) of responsibility.
5. Understands Extension’s organizational procedures.
6. Supports goals and needs of organization.
7. Models behavior consistent with organizational values.
8. Ensures compliance with Extension’s values of diversity and inclusivity.
Volunteers

These competencies describe the ability to recruit, select, train, and recognize volunteers who contribute time to the promotion, organization, assistance and leadership of Extension programs.

1. Embraces organizational philosophy of volunteerism.
2. Follows Extension policy for engaging volunteers.
3. Embraces the use of volunteers to expand and enhance programming.
4. Creates and supports a positive organizational environment for volunteerism.
5. Develop and supports staffing structures that align and support meaningful roles for volunteers.
6. Identifies potential roles to engage volunteers.
7. Implements multiple strategies to recruit potential volunteers.
8. Conducts orientation training for new volunteers.
9. Delegates appropriate responsibilities to volunteers.
10. Identifies and matches individual motivations, skills and time commitment with available roles and responsibilities.
11. Motivates volunteers to stimulate creativity and reach potential.
12. Addresses behaviors of volunteers not consistent with acceptable standards.
13. Conducts continuous training for volunteers based on identified needs.
Roles

New Agents
The Extension Agent will take the assessment, and the resulting score will help guide the agent’s professional development plan. Agents will take the assessments, following the timeline in this guidebook.

Regional Directors and Program Leaders
Regional Directors will receive periodic reports of new agents’ scores and completion progress of the Competency Assessment. Regional Program Leaders will schedule a meeting and work with agents who do not receive scores of ‘proficient’ to develop professional development plans based on assessment results, as indicated by the timeline in this guidebook.

Extension Evaluation and Staff Development Department (EESD)
EESD will be responsible for assigning the assessments to new agents through K@te, the learning management system. The Department will introduce the assessment and provide information to new agents at New Employee Orientation, which occurs twice annually in the spring and fall. The Department will assign online courses in K@te that are identified by the agent and their Regional Program Leader and track progress, reporting to Regional Directors and Program Leaders periodically.

County Directors
County Directors are informed that the new agent is expected to complete the assessments. County Directors will have access to the new agent’s assessment results, but these results are not to be used for performance appraisals or disciplinary procedures. The goal of the assessment is to aid in identifying professional development needs and opportunities. County Directors should be aware of the agent’s timeline for completing the assessments and should support them as they complete the assessments, work with their Regional Program Leader to identify training, and complete assigned training.

Mentors
Agents have the option to share their results with their assigned mentor. The mentor can provide guidance and support to the agent as they identify professional development opportunities. The mentor can also offer advice and support as needed.
The Competency Assessment program will operate on a one year timeline from the time the employee attends New Employee Orientation.

**Timeline—Spring**

- **March - April**
  - Agent completes assessments in Professionalism and Communication & Interpersonal Skills.

- **May - June**
  - Agent completes assessments in Leadership, Educational Design, and Partnerships.

- **July - August**
  - Agent completes assessments in Organizational Systems and Volunteers.

- **September**
  - Regional Program Leader receives final scores and sets up a meeting with the agent and their county director.
  - The meeting will be to discuss professional development training and assign e-learning.
  - Assigned training is added to agent’s K@te transcript to complete.

- **September - February**
  - Agent completes all assigned training in K@te.
The Competency Assessment program will operate on a one year timeline from the time the employee attends New Employee Orientation.

**Agent attends New Employee Orientation in September.**

Assessments are assigned in K@TE.

**September - October**

Agent completes assessments in **Professionalism** and **Communication & Interpersonal Skills**.

**November – December**

Agent completes assessments in **Leadership, Educational Design, and Partnerships**.

**January – February**

Agent completes assessments in **Organization Systems** and **Volunteers**.

**March**

- Regional Program Leader receives final scores and sets up a meeting with the agent and their county director (if needs are identified).
- The meeting will be to discuss professional development training and e-learning.
- Assigned training in K@TE is added to the agent’s transcript to complete.

**March – September**

Agent completes all assigned training in K@TE.
Accessing the Assessments

Assessments will be accessed through the learning management system, K@TE, located at [https://tennessee.csod.com/samldefault.aspx](https://tennessee.csod.com/samldefault.aspx).

1. Log in with netid and password.
2. Once assigned by EESD, the assessments will be located in the box labeled “Your Transcript.” Click on “Open Curriculum” to open the full list of seven assessments.
3. Click “Launch” to open each assessment. Make sure that the popup blocker is disabled.
4. Complete the assessment. Each assessment should take between 30 minutes and one hour.

5. Assessments are completed in order and according to the timeline.

During New Employee Orientation, agents will be given instructions and time to access the assessments in their K@TE account.

While scenarios may mention program area specific activities and events, it is important to react to the scenarios based on the soft skill competencies that apply to all Extension Agents, regardless of program area. It is also important to note that there may be multiple answers that could be considered correct, but paying attention to the underlying competencies will help when selecting the best answer for the given scenario.

Using Assessment Results

The purpose of the Competency Assessment is to aid in identifying professional development needs and matching them with e-learning available through Skillsoft courses available at no charge through K@te, as well as other available e-learning opportunities.

Following the timeline in this guidebook, Regional Program Leaders will contact agents receiving a ‘Needs Training’ score of less than 80% on any assessment to schedule a meeting to discuss training needs. If the agent receives a ‘Proficient’ score on all assessments, they are not required to complete this step, but they may seek out additional professional development opportunities if they feel they need additional training in a competency area.
Identifying Professional Development Needs

During the meeting between the agent, their County Director, and the Regional Program Leader, training needs will be discussed and e-learning will be assigned, following the recommendations below and the discretion of the Regional Program Leader and County Director.

<table>
<thead>
<tr>
<th>Score</th>
<th>Recommended E-learning Credit Hours per competency area</th>
</tr>
</thead>
<tbody>
<tr>
<td>80 - 100</td>
<td>None - Proficient Score</td>
</tr>
<tr>
<td>70 - 79</td>
<td>2 hours</td>
</tr>
<tr>
<td>60 - 69</td>
<td>4 hours</td>
</tr>
<tr>
<td>50 - 59</td>
<td>6 hours</td>
</tr>
<tr>
<td>Below 50</td>
<td>8 hours</td>
</tr>
</tbody>
</table>

Once courses are identified and agreed upon, EESD will assign the courses to the Agent in K@TE and track progress and completions. Completed online courses can be counted toward an agent’s annual in-service hours.

Prior to the one year deadline for agents to complete all assigned courses, EESD will send a reminder to the Agent. All assigned courses must be completed one year from the New Employee Orientation the agent attended.
Frequently Asked Questions

What is a competency?
Extension defines a competency as the necessary knowledge, skill, ability, and characteristic for an employee to be successful.

What is EXCELS?
Extension Competency E-Learning for Success is a competency-based, focused approach for staff development for behaviors of Extension Agents to help ensure the greatest level of success. The focus of EXCELS is professional development. It is not used for hiring, performance appraisal, or disciplinary actions.

Why do we need a competency-based system?
Extension employees, including agents, identified the need for professional development beyond subject matter areas. The process enables an Extension Agent to self-assess and develop a personalized development plan. The focus of EXCELS is solely centered on training and professional development.

What is the process of EXCELS?
The process involves the Extension Agent taking the assessment to identify any competency areas where more development is needed and working with their Regional Program Leader and County Director to create a professional development plan.

Will this influence whether a person is hired?
No, this assessment is intended only to identify needed professional development to enable new Extension Agents to effectively perform the duties of their positions. It is not expected that agents be proficient in all areas, as development opportunities and training is an expected part of preparing employees to perform all duties.

Will the assessment be part of the performance appraisal process?
No, the results of the assessment will not be factored into the Extension Agent’s performance appraisal. However, the pursuit and completion of professional development opportunities to become proficient in all competencies will be evaluated.

Who is required to take the assessment?
New and recently hired Extension Agents (within 6 months) will participate in EXCELS.
What is the assessment?
The assessment covers seventy-three (73) competencies comprised in seven (7) different competency areas that were identified as essential skills for successful Extension Agents. This assessment is an online tool developed and tested by Skillsoft. Skillsoft is an established company that has a history of developing effective assessments and training programs to improve skills for a variety of professions. The assessment is based on real-life scenarios and situations related to Extension.

When do I take the assessment?
New Extension Agents are required to complete the assessment within six months from their attendance at New Employee Orientation. All corresponding courses should be completed within one year.

Who has access to my results?
You, your county director and regional program leader will have access to your results. You can choose to share the results with your mentor if you feel it will be helpful. Your results will only be used to help you and your regional program leader to develop a professional development plan.

How are the assessments scored?
The assessments are scored as a percentage. Each assessment contains several scenarios with at least three to four questions. Since many situations can be complex and have multiple responses, some questions ask for multiple answer selections, which is indicated by the phrase “Select all that apply” or similar. If all correct answers are not selected for a question like this, the answer is scored as incorrect. 80% is a “proficient” score. Less than 80% is scored as “needs training.”

Why can’t I take all the assessments at once?
The assessments are designed to be taken in a certain order and staggered apart on a schedule, since a new agent may not have enough on the job experience to be able to successfully address scenarios in later assessments.

Can I retake an assessment?
Since the assessment is only used to help identify areas professional development needs, it is not required that an agent retake the assessment. Scores will not be used for any other purpose, so only the first score is recorded.

If my assessment results indicated proficiency in all competency areas, is professional development and/or training still needed?
No, it is not required, but you are highly encouraged to pursue professional development opportunities to strengthen and grow your skills.
Acknowledgements

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