

General Suggestions for Organization and Operation of  
County Extension Offices in Minnesota

I. FILES AND FILING

In the county extension offices there are found five kinds of material for which the vertical filing cabinet offers the best method of holding. These are (1) correspondence, (2) project material, (3) permanent records, (4) information material, (5) reference bulletins.

A. Files

1. Correspondence

a. Manner of filing

- 1) Alphabetically, by name only
- 2) Latest letter always in front
- 3) Letter and carbon not attached
- 4) Individual folders only when there are eight or more letters to or from one individual or firm
- 5) Important information or names are listed for project folders before filing.

b. Folders and labels

- 1) Blue labels for general folders, crimson labels for individual folders, all arranged in alphabetical sequence

c. Two or more agents in same office

- 1) May file correspondence of both in same set of folders, or
- 2) May maintain separate set of folders for each agent.

2. Project Material

a. Filed in folders with green labels

b. Folders contain lists or other records covering current year's activities of the project in the county. Date all lists or other records to indicate year. May contain copies of circular letters bearing on project, especially pertinent information, etc. Correspondence is not placed in project folders. General information material not desirable.

c. In case of single agent in county, file project folders in same drawer with correspondence, all in alphabetical order.

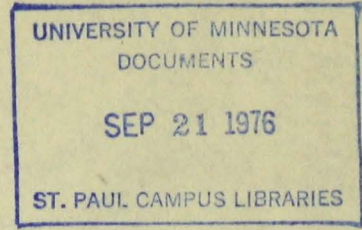
d. In case of two or more agents, may be best to have project folders in separate filing cabinets near each desk.

3. Permanent Records

a. Official records, such as annual reports, monthly reports, expense accounts, legal papers.

b. Correspondence or records bearing on projects that should be retained temporarily or permanently.

c. Material of historical value in connection with progress of work in county.



*Stewart  
Boys' work  
club work -*

This archival publication may not reflect current scientific knowledge or recommendations. Current information available from University of Minnesota Extension: <http://www.extension.umn.edu>.

- d. Same color scheme and same principles are followed as in correspondence and project files.
4. Information Material
    - a. Clippings, literature, catalogs and other material of informational nature, arranged by subject matter in alphabetical order. Material added or discarded rather freely.
    - b. Guides or folders may be used to contain or to separate materials.
  5. Reference Bulletins
    - a. One copy of each for reference only. Arranged according to recommended key.
    - b. Guides used to separate divisions.
- B. Clearing the Files
1. Policies in Clearing
    - a. Correspondence. Go over every paper, discarding all that it is felt unnecessary to keep. File balance in permanent file by name.
    - b. Projects. Some project folders are carried forward with revision from year to year. Some are reduced in amount and filed in permanent file. See that all lists bear the date of the year.
    - c. Permanent file. Some material is kept only for a few years and then sorted still more closely. Some materials such as annual reports, legal papers, etc., are kept permanently.
    - d. Information file. Constant revision necessary, always adding, always discarding.
    - e. Reference bulletin file. Keep file up to date by adding new bulletins as they appear, discarding out of date bulletins.
  2. Two Year Rotation. Used for correspondence and projects.
    - a. Leave previous years drawer intact until near close of current year, when it will be cleared for following year. Meantime second drawer is being used for current year, with fresh folders. Three year rotation may be used if file space permits, holding material for two years.
  3. How long should material be kept? Recommendations are general; policies in counties will vary somewhat.
    - a. Correspondence. In two year rotation--till close of following year. In three year rotation--till close of second year following. Papers advanced to permanent file will, of course, be kept for a longer period or permanently.
    - b. Annual reports, monthly reports, expense accounts, pink receipts for expense accounts, legal papers, kept permanently.
    - c. Special campaign material for at least a year after definite use is over, in some cases longer.
    - d. 4-H club stories. These are useful later in awarding trips and honors. Keep all stories for at least one year and keep rather

indefinitely the stories of those who may later enroll in leadership work or qualify for special awards. Stories of those beyond club age or who have left the county, or who for other reasons will probably not be able to qualify for later honors or awards, may be discarded at close of first year or later. Go over the file of stories once a year to reduce the volume, if space is limited.

- e. Local leader reports in home projects. Till regular clearing in rotation plan. This will hold them till after close of year in which project is given.
- f. Outlines of lessons on home projects. Same as local leader reports.
- g. Daily reports. Till regular clearing in rotation plan.

### C. Filing Equipment and Materials

#### 1. File Capacity Needed.

- a. Two four-section vertical files in case of single agent, three in case of two agents. These amounts allow for program as outlined and a little to spare. With less space than above some material will have to be filed in temporary condition. A more elaborate filing program as followed by some agents calls for considerably more filing space.
- b. Detail of space needed
  - 1) For one agent:
    - Two to three drawers for correspondence and projects
    - One to two drawers for permanent records
    - One drawer for information
    - One drawer for reference bulletins
  - 2) For two agents:
    - Four to five drawers for correspondence and projects
    - Two to three drawers for permanent records
    - Two drawers for information
    - Two drawers for reference bulletins

#### 2. Materials Used

- a. Filing cabinets. Four drawer vertical filing cabinet. Standard file commonly used is of green steel, has drawers on bearings so they operate easily even though heavily loaded, and has follow-block (for compressing contents) which operates easily and quickly. Do not confuse with transfer files, which are usually sold as individual drawers, are made of either steel or wood, may have no bearings, and are quite unsatisfactory for use of extension agents.
- b. Folders. Correspondence size, manilla folders reinforced. Catalog No. 5018 R, sold by Remington Rand Business Service, Roanoke Building, Minneapolis, Minnesota. These occupy third and fourth position only and are proper height to be visible when used with guides, 60825.
- c. Colored labels. Gummed name labels for individual folders, catalog No. 1319. Specify colors, green, blue, crimson, sold in boxes of 250 or 1000 labels. Same company.

- d. Guides. A - Z guides set of 25. Catalog number 50825. Occupy first and second position only. Same company.

## II. DESKS

### A. Agent's Desk

1. Flat Top Desk Preferred
  - a. Encourages one to clean up office work promptly.
  - b. Presents a neater appearance than a roll-top desk.
  - c. By eliminating the many pigeon holes and little drawers establishes better filing habits.
  - d. Enables one to talk across desk with visitors.
2. Use of Drawers
  - a. Upper left - current mail
  - b. Middle left - unfinished work
  - c. Lower left - material to be read
  - d. Center - Contains desk tray for pencils, clips, stamps, pins, etc. (adjustable tray may be secured)
  - e. Upper right - paper, blotters, notebooks, personal, purse, etc.
  - f. Lower right - (double) working file
3. General Use of Desk
  - a. Maintain as few things on and in desk as possible. Get habit of putting things away instead of leaving in desk.
  - b. Desk is not for storage purposes. Materials pass over or through desk instead of remaining there.
  - c. Clear off top of desk daily upon leaving office.
  - d. Develop habit of using all parts of desk as described above.

### B. Clerk's Desk

1. Full sized stenographer's desk preferred with six single drawers and drop head.
2. Use of drawers.
  - a. Upper right - envelopes, pencils, small supplies
  - b. Middle right - letterheads and second sheets in slanting sections
  - c. Lower right - carbon paper, stencils
  - d. Upper left - Personal and miscellaneous
  - e. Middle left - unfinished work
  - f. Lower left - material for enclosures, varying with season
3. General Use of Desk. Same principles apply as in case of agent's desk.

### III. OFFICE ARRANGEMENTS

#### A. Ideal Office Plan

1. Central or general office, for office clerk, correspondence and permanent files, bulletin distribution racks, telephone.
2. Private office for each agent, with project files, information files, reference bulletins. Extension telephone to each.
3. Work room for mimeograph, supplies, extension equipment, surplus bulletins, preparation of material, etc.

#### B. Appearance of Office

1. Should be neat and orderly at all times.
2. Desks should be cleared to good working condition.
3. Walls should be comparatively free of calendars, sale bills, posters, etc. Newspapers, periodicals, bulletins or other literature should be kept in orderly condition.
4. Office should be as free as possible from surplus material. If sacks of grain, movie machine, tires, left over county fair exhibits, bundles of supplies, and other articles must be kept by agent, find some other place than the office to keep them.
5. Office should be clean. This applies to windows, floors, walls, furnishings and office in general.

#### C. Use of Small or Badly Crowded Office

1. Elimination of materials must be more severe in the small office than in larger offices.
2. Some of the tables, chairs, bulletin racks or other furnishings considered necessary in larger offices must be dispensed with.
3. Office conferences ordinarily held in office may be carried on elsewhere.
4. If conditions are very undesirable, watch for possibility of change in arrangements to secure more desirable space.

### IV. OFFICE CLERK

#### A. Qualifications

1. Speed and accuracy of dictation. Fifty words per minute is good standard. Dictation 75 words per minute. (Inquire of applicant what her tests showed at school.)
2. Pleasing personality, meets people well, conscientious, intelligent, neat, does not attract loafers.
3. Should not be a relative of any county or extension official.

#### B. Duties

1. Take dictation, type letters, and file correspondence.
2. Meet visitors, answer telephone.

3. Responsible for daily record sheets, recording some parts and seeing that agent records others.
4. Responsible for statistical portion of monthly report and expense account.
5. General clerical duties and maintenance of neat office.

#### V. HANDLING MAIL

##### A. Clerk's Duties with Mail

1. Opens all mail except personal letters. Unfolds letters, straightens out literature, stacks on agents desk in orderly manner. Arranges periodicals, supplies, etc. in proper places without referring them to agent.
2. In correspondence, clerk takes dictation, types letter, places it before agent for inspection and signature, folds letter and seals envelope, files letter and carbon of answer.
3. As many as possible of the special operations in connection with correspondence should be done by the clerk. She should wrap and mail material, look up material when needed, answer emergency letters in absence of agents. Agent, however, should not make a practice of handing letters to the clerk for her to answer. He should dictate his own letters.

##### B. Agent's Duties with Mail

1. Sorts mail into groups, correspondence to be answered, material to be filed direct, literature reserved for reading, material to be discarded. That reserved for reading is dropped into reading drawer. Mail to be answered is either answered at once or retained in mail of desk. In any event, top of desk is cleared before leaving the day's mail.
2. Answering Correspondence. Agent prepares answer, dictates letter, inspects and signs letter.
3. Promptness. Correspondence should be promptly answered. Incoming letters should be given fair attention. Plan the time to give proper attention to correspondence.

#### VI. OFFICE STANDARDS

- A. Office hours of clerk. Should be definite and well understood. Require promptness and full day. University Farm hours 8:30 - 12:00 1:00 - 5:00. Have an understanding as to office time in rush periods or emergencies.
- B. Office hours of agent. When the agent has been out late the night before or must leave in the afternoon to prepare for an evening trip, it is not to be expected that definite office hours will be observed by the agent. But, in those cases when office days are in effect without interruption from preceding or succeeding events, regular office hours should be as obligatory upon the agent as upon the office clerk.
- C. Clerk should have agent's schedule at all times. She should be able to tell where he is, or when he may be expected, or how he can be reached. This responsibility rests on both clerk and agent.

- D. Make full and accurate reports especially as to leave or vacation, holidays, sick leave. Absence from office not in the line of regular work should be reported as leave.
- E. Keep busy. Workers should never do fancy work, read novels, or otherwise kill time at the office. Time for such things implies poor organization or lack of volume of work, on part of agent.
- F. Observe business formalities between workers.
- G. Impressions are important. Caller should carry away feeling that:
  - 1. Here is centered the agricultural life of the county; maps, charts, objects, evidences of projects, conversation, should help to convey that impression.
  - 2. The office is an efficient and an important place of business where ideas may be exchanged and wants promptly and courteously handled.
  - 3. The caller is not only welcome and entitled to attention, but the office in a real sense belongs to the people of the county and is something of which they can be proud.