

**YUMA CONSERVATION DISTRICT**  
**GENERAL OFFICE PROCEDURES AND POLICIES**

*This general procedures manual is provided to orient new employees and as a general reference and guide for all employees. The goal is to deliver professional services to the public. Procedures may be amended or superseded at any time.*

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## **General Office Procedures**

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### **APPOINTMENT SCHEDUING**

*(To be completed)*

### **BULLETIN BOARDS AND DISPLAYS**

- Bulletin board and displays are for notices of meetings, sign-up dates and deadlines, upcoming events, information and education on natural resource concerns and key conservation practices and Farm Bill Programs.
- Help get information to customers by developing and sharing information for the boards.
- Other appropriate material may be displayed. Questions about appropriate displays should be directed to the District Manager and the NRCS District Conservationist.

### **CASH SALES**

*(See Sales Policies and Procedures Manual)*

### **CALENDARS**

- District and NRCS employees maintain a joint monthly schedule calendar and an IN - OUT board for reference by other employees. Help other staff members serve customers by using these tools.

### **CHARGES AND FEES FOR USE OF DISTRICT EQUIPMENT**

*(To be completed)*

## **COMPUTER MAINTENANCE & SECURITY**

- All district employees must follow established computer security procedures to ensure the security of district files.
- District employees must complete basic computer security training.
- District employees using Common Computer Environment (CCE) computers must complete USDA/NRCS training.
- Internet use is restricted to work purposes only.
- Email use is restricted to work purposes only.
- CCE computers – do not install or download any software programs without NRCS approval.
- Other district computers – Do not download or install software programs without permission of the district manager.
- Never install software that is not licensed to the district.
- Each computer has an anti-virus program. It is the responsibility of the employee assigned to a computer to note and report expiration dates of anti-virus subscriptions so they can be maintained without interruption. Expiration dates should be reported at least 60 days in advance.
- Computer backup files – See Files and Records Maintenance.

## **CONFIDENTIALITY**

- District employees are required to understand and abide by a Confidentiality Statement (*Employee Handbook*).
- Follow records management and public records policies and procedures. (*Separate section*).
- Do not leave customer files and information on your desk top where they can be viewed by others.
- Put customer files away when you are finished working on them.
- If you make a photocopy or printout of cooperator information, keep track of it. If you don't need copies or printouts any more, dispose of them appropriately.
- Be careful of how you handle paper information in your work area, and especially when you take it away from your work area.
- When disposing of documents shred – do not toss in the trash – any document that contains sensitive information, cooperator personal information, payroll and personnel records, and district financial information.

## **CORRESPONDENCE**

- Use standard letterhead for letters. Use accepted business letter format.
- All letters, envelopes, and mailing labels must be produced in the computer. (Do not use longhand).
- Proofread work for spelling, grammar and accuracy.
- Do not mail anything without keeping a file copy.
- Copies of outgoing district correspondence – file in Central Files.
- All official district mail is filed in Central Files. Copies can be made for other files, when needed, but originals of official business correspondence are kept in the Central File.
- Also see *Files and Records Management*.

## **EMAIL CORRESPONDENCE**

- Official correspondence received by email: Save to hard drive the message and all attachments. Clearly label files by recipient / agency partner / organization.
- Back up all official email correspondence and attachments using backup procedures.
- Email correspondence with general information, events, training, etc. that should be seen by other district and NRCS personnel – forward the message to the appropriate individual(s) or print a hard copy and circulate with the U.S. Mail.
- Also see *Files and Records Management*.

## **EMPLOYEE DISCOUNTS**

*(See Sales Policies and Procedures)*

## **FILES AND RECORDS MANAGEMENT**

- USDA/NRCS Records Management procedures will be used as a model to develop district filing system.
- All official district records are maintained in the Central Files accessible to and under the supervision of the District Manager. This includes project contracts, regular reports, financial records, original proposals, grants, grant correspondence and reports. Copies may be maintained in project files, when necessary.
- All producer records are maintained in a way that preserves privacy.
- Also see – Correspondence and Email Correspondence.

### **Files and Records Management - Computer Backup Files**

- Make at least two copies of every important file, on different media.
- Make backups as soon as practical after creation of new files, but at least once a week.
- As new backup copies are made, retain older copies.
- Do not keep all backup copies at the same location as the original data.
- Media that can be used for backup files includes CD-Rom and floppy discs.
- Backup files must be clearly labeled and dated.
- Backup discs must be kept in a secure and fireproof location.
- Paper hard copies must be made of official records, including minutes of meetings, resolutions, financial reports, and financial records.
- Paper hard copies must be made of all official grant and contract-related business, including narrative and financial reports.

## **GREETING THE PUBLIC**

NRCS and District employees share the responsibility of greeting customers and directing them to the appropriate person.

## **MAIL**

Mail to the District and NRCS comes to the same post office box. If you are responsible for getting the mail:

- Pick up mail every morning after 9:00 a.m. and generally before 10:00 .m.
- Open the mail and date stamp.
- Attach envelopes that contain return address information.
- Put mail in a MAIL folder and give to the District Manager or District Conservationist.
- District and NRCS correspondence on general topics is circulated so all staff members from both agencies are aware of news, regulation changes, sign-up dates, events, etc.
- Staff members – initial mail when read and give folder to the next staff member or to the person responsible for filing.

## **MAILING LISTS**

- Mailing lists are kept in data base files. Mailing lists are used for newsletters, official notice of annual meetings, information and educational mailings, and other purposes. Some lists contain cooperators only; others have agency and conservation partners.
- Data base files should be named with the purpose (e.g. “newsletter”) and the date of last update.
- Keep a backup copy of data base files.

## **OFFICE EQUIPMENT MAINTENANCE & REPAIR**

- Report all equipment problems to the District Manager when noted.
- Report CCE computer problems / needs to the District Manager and the District Conservationist.
- Report all computer maintenance and supply needs to the District Manager when noted.

## **OFFICE SUPPLIES AND ORDERS**

- Both the district and NRCS order office supplies. The source of your supplies will depend on your project work.
- Supplies for projects must be within project and district budgets and approved in advance.
- You are responsible for reporting your work station supply needs.
- Most supplies are not available locally. Anticipate and report supply needs ahead of time to avoid running out during a project.

## **OPENING AND CLOSING THE OFFICE**

### **Morning Procedures**

- Check answering machine
- Check FAX machine for transmissions sent in the night

### **Evening Procedures**

- Turn off / unplug coffee pot, other machines and appliances.
- Check paper supply in the FAX machine.
- Check / lock storage shed.
- Check / lock front and back doors.
- Turn off all lights except outside light on flag.
- Check thermostat. Turn down to 64 in winter and turn off air conditioning in summer.
- Take outgoing mail to the post office.

## **PERSONAL POSSESSIONS**

Employees have assigned work stations. If you are a part-time employee, your work station may be used on a regular basis by other employees. If you are a full-time employee, other staff members may need to access your work station from time to time. Some work stations are shared by all employees.

- The district will supply you with office equipment, software, office supplies and materials, as needed, for you to complete your work assignments (within budget).
- Do not bring personal office equipment, computer software, or office supplies to the office to use for district work.

## **PERSONAL POSSESSIONS – continued**

- NEVER install personal computer software on district computers.
- Personal items that express specific religious, political, or philosophical beliefs, or which are in conflict with the mission of the district, or are otherwise inappropriate in the work place, are prohibited.
- You may bring some small personal items such as family photos, small radios, etc., if you keep them in your work station and they do not interfere with district business or access to a shared work station.
- If you bring personal books, manuals, reference materials, etc. to the office on a temporary basis, clearly label them with your name and keep them separately from district and NRCS materials.

## **PETTY CASH**

- The Petty Cash drawer is used to pay for minor, miscellaneous, unanticipated expenses, and for small miscellaneous charges and fees.
- EACH transaction in the cash drawer must be documented: Cash sales must have an invoice; petty cash received must have a completed receipt; cash paid out must have a petty cash slip with vendor receipt / invoice stapled to it.
- Each transaction must be dated and clearly identified with the staff member's name or initials and the purpose of the transaction.
- Payments from petty cash over \$15 must be approved by the District Manager.
- Petty cash account is reconciled once a month and reimbursement reports and transactions are itemized by account.
- Other income and expenses in the cash drawer – see **Cash Sales** (*separate section*).

## **POSTAGE**

- District postage is purchased by district check. Do not use petty cash for ordinary postage purchases. Irregular and unanticipated postage expenses (oversize, overweight) may be paid with petty cash if they are less than \$15.
- The district may have a bulk mailing permit for mailing newsletters, etc. If available, use the bulk mailing permit for large mailings.
- Government postage and post cards (mail room) can be used for official USDA mail ONLY.

## **PROFESSIONAL FACILITY**

- Customers get a first impression of the agencies when they first arrive. Help maintain a professional appearance in the front room. Keep unnecessary clutter off of work surfaces and floors. Clean off commonly shared work surfaces when you have finished your project. Put things away at the end of the day.
- Cleaning. A cleaning service comes on Saturday. You can help them do a better job by clearing things out of the way before you leave for the weekend. This includes desk top and floor area around desks.
- Facility repair and maintenance needs should be reported to the District Manager when noted.

## **STAFF MEETINGS**

- The purpose of District staff meetings and joint staff meetings with NRCS is to facilitate open communication, encourage collaboration and teamwork, and to prevent problems or resolve them at the earliest opportunity.

## **SECRETARIAL, CLERICAL AND OTHER SUPPORT STAFF WORK**

*(To be completed)*

## **TELEPHONE**

- Codes are required for long distance calls. Codes identify the person making the call and the project to be charged with the expense.
- Long distance log sheets are available to track project calls.
- Do not make personal long distance calls.

## **TELEPHONE MESSAGES**

- District and NRCS staff members share responsibility for answering the telephone and directing calls.
- Telephone messages must be taken in writing and given to the person for whom they are intended as soon as possible.
- All telephone calls should be returned within 24 hours.

## **WORK PRODUCT**

- Produce a professional looking work product.
- Use the right materials for the job.
- Follow established procedures.
- Have your correspondence, newsletters, articles, etc. proof read before they leave the office.