

Master Gardener Office Procedures

Clackamas County

Preparation

- Arrive at the office 10-15 minutes before scheduled time
- Wear your Master Gardener badge.
- As a courtesy to others, please don't wear cologne or perfume during your phone shift.
- Optional: Bring your notes from training, also a beverage or snack.
- Cell phones: Please turn off your cell phone or set on vibrate; take calls in the back kitchen area so as not to disturb other Master Gardeners or faculty/staff.
- No pets allowed in building only service animals.

Phone Shift time and Sign up

- Sign up for shifts at CERVIS Event Registration: www.metromastergardeners.org (See "CERVIS: How to register for events")
- If you have questions about signing up for phone shifts on CERVIS, please contact Jean Bremer, MG liaison and Phone Clinic Coordinator: Jean.Bremer@oregonstate.edu; 503-655-8631
- MG phone clinic shifts are 9-noon and/or 1-4 PM, Monday through Friday, except office holidays

Cancellation and Substitute Policy

- If you can't make your shift, **you are responsible for finding your replacement**
- Unregister yourself for that shift on CERVIS.
 - **Note:** Option to unregister will be blocked on CERVIS 6 days before event, so please notify Jean Bremer directly.
- *Interns sub for Interns, Vets for Vets*
 - You can request a list of subs from Jean (Please specify which list you need.)
 - Do not use the contact information for other purposes.
- After you locate a substitute, email of phone sub's name and shift date and time to Jean Bremer.
- If you are unexpectedly delayed or have a last minute emergency which prevents you from coming to the office, notify Jean (503-655-8631)

General guide

- You will receive a confirmation email when you register on CERVIS. Make sure to match the shift time/date saved in your calendar with the confirmation e-mail.
- Don't go to the office if you are contagious (i.e., cold, influenza, gastroenteritis.) Locate a substitute.
- **Note:** *Interns sub for Interns, Vets for Vets.*
- If an MG on your shift is more than 20 minutes late, call to diplomatically remind the individual s/he was expected for the shift.
Phone numbers are with the monthly schedule on the bulletin board.
- If your MG shift partner can't be reached by phone or is a "no show", notify Jean Bremer and write "no show" on the monthly calendar.

MG Office & Parking

- Park vehicle on the outside row of the parking lot, facing Warner-Milne Road rather than the building.
- Parking is available in the back of the building if needed. The back door is locked so you must enter through the front door.

OSU Extension Office Faculty/Staff

- The Master Gardener liaison is Jean Bremer. She is also the office's receptionist.
- Jean Bremer is also Weston's, Jordis' and Margaret's office specialist.
- Roxie Applebee is the office manager.
- Mike Bondi is the Regional Administrator Clackamas Region (Region 10) and Director North Willamette Research and Extension Center (NWREC)
- Metro Community and Urban Horticultural Agent, Weston Miller; Metro MG Program Coordinator, Jordis Yost; and Margaret Bayne, Administrative Program Specialist are also located in this office.

First duties

- Check-in with the receptionist or other staff upon your arrival.
- Coats are to be hung on the coat rack in the kitchen. For security reasons, store purses or other valuables in the bottom drawer of either file cabinet.
- Turn on computer (use password shown on bulletin board next to computer).
- **NOTE:** Wi-Fi is not provided to MGs or the public.
- Begin a new Daily Log for each shift (See Tab B: Daily Log)
 - Blank Daily Log sheets are located in the clear plastic rack on the MG desk.
 - Put the names of each volunteer for the shift in designated space near upper right.
- Review recent Daily Logs in the Daily Log Binder. Questions are often seasonal.
- Make reminder calls to next-days MGs on duty for same day and time period
(Phone numbers are with the monthly schedule on the bulletin board)
- Check the Referral basket to see if any Referrals need attention
 - Verify if Referral has been uploaded to the MG Forum.
 - An unsolved Referral may be present if the inquiry arrived too late during the previous shift to be resolved
(See Tab E for full details about Referrals)
- Check MG email (See Tab J: Computer)

Public Contacts

- Walk-in clients have first priority.
- If you are busy and you have a walk-in, ask the secretaries to hold incoming calls.
- While speaking with the client
 - Ask the client's name and phone number. (Some people will refuse.)
 - If needed, refer to *Questions to Ask Clients* (green laminated sheet)
 - Jot down notes on a tablet or scratch paper.
- After the contact, record a summary of the client's question on Daily Log. Make sure to record phone number or email clearly.
- If your shift is unable to answer the client's question, see that topic below.

Answering phone calls

- Say, *OSU Extension Master Gardener Volunteer. How may I help you?*
- While speaking with the client,
 - Ask and record the client's name and phone number or address.
(Some may refuse.)
 - If needed, refer to *Questions to Ask Clients* (green laminated sheet)
 - Repeat the question out loud so the other MGs can start researching.
 - Jot down notes on a tablet or scratch paper.
- Don't offer your name.
 - If the client asks for your name, give only your first name.
 - If needed, explain that you are just one of many Master Gardeners; it's unlikely you will be in the office the next time s/he calls.
- There is no hold button on the phone:
 - Simply lay the phone down on the desk if you need to.
 - Be aware that this is still an open line; the caller can hear you.
- If you find the answer after you have left the office, don't contact clients from home. Instead, call the office to ask the MGs to contact the client.

Record keeping on the Daily Log (Also see Tab B: Daily Log.)

- Record client's contact info: full name and phone number, address or email.
- Record a brief summary of the question and answer, with your resources. Whenever possible, include page numbers.
- One client is one entry, even if s/he had multiple questions during that contact.
- **Do not** count your reminder calls as contacts in the totals.

To request and examine a sample (See Tab D: Samples)

To return phone calls

- Dial 9 for outside line, and then dial the phone number.
- Long distance calls are OK.
- Call back before the end of your shift, even if it is to tell client someone is still researching the question and will contact the client later.

How clients may obtain OSU publications

- **Note:** Publications of \$5 or less are free to clients. Notify front office staff to bill the MG program account.
- You may direct clients with Internet access to the OSU Publications website <http://extension.oregonstate.edu/catalog/>
 - Some publications aren't online.
 - See tab Q, 'Publication and Videos' in the MG Resource Binder, for a current list of OSU gardening publications.
- Or, the client can pick up the publication at the office.
- Or, you can mail the publication. Provide secretaries with client name and address. Office staff will mail publications. Notify client that they will receive a bill for publications over \$5.
- Or, you can email some publications as attachments or provide a link.

To make photocopies

- Check with Jean Bremer or other staff regarding making copies. Copies are free to clients up to \$5. (Tell staff to bill the MG program for charges under \$5).
- Always write reference source on anything you copy.
- Before copying an OSU publications, see if publication is available at main desk.

If your shift is unable to answer a client's question/problem

- Tell client the question requires further research; another Master Gardener will call back later.
- Suggest the client call the MG office if he/she doesn't hear back within a week.
- Fill out the appropriate Referral form completely **and** upload the information to the MG Referral Forum (See Tab E: Referral Forms.)
- Record contact in Daily Log. (See Tab B) (e.g.: "Uploaded Referral for client.")
- Blank forms are in the standing rack on the MG desk.
Blue = Plant for ID Green= Plant Problem Yellow= Insect, Spider, Etc.

Unresolved Referral Forms

Note: See Tab E for information on the new referral procedure and use of the MG Dx (Diagnostician) Forum.

- Place referral sheets that have been uploaded to the MG Dx Forum into the brown file folder in the black metal basket.
- Once the identification/diagnosis is completed on the MG Referral Forum, follow the directions in Tab E: Referrals, in the document *When & How to Use Referrals*
- **Please remember**
 - Refer only commercial inquiries to an appropriate extension agent, including Weston. These include government and industrial entities (e.g. nursery/garden centers, growers, spray services, landscapers, pest control operators, ODOT, parks departments).
 - When clients make inquiries for personal health, including an unshakable belief that live organisms are present in or on the skin, suggest s/he seek advice from his/her health care professional. If they persist, refer to Weston Miller, Urban Horticulturist, 503-706-9193 (See Tab F: Responses to Clients.)

References & supplies

Table

- Copies of the PNW Management Handbooks, MG Sustainable Gardening Handbook, WSU Landscape Plant Problems and Clackamas County Resource Contact List are on the MG desks.
- Pens and pencils are on the desks.
- Portable file on the desk has general resources for diagnosis and help.
- 10x loupe, dissecting kit and scissors are in plastic box by Microscope.

Book Shelf

- These books are for in-office use only. **They are not lent out to MGs or customers.**
- Reference books are organized by topic.

- When replacing a book on the shelf, match its colored label to the topic label.
- Many resource books use only Latin names in their index. If you know the common name, use Sunset's index to determine the botanical name.

Helpful Books & Websites (See Tab L) is an annotated list of some books in the MG library as well as some of the websites in the computer Favorites list.

File cabinet

- The two file drawers next to the bookshelf contain some OSU publications and other background information that may be useful.
- For a complete list of file sections see *first* hanging file in top drawer labeled, "File System List".
- Remove desired brown folder with contents. Leave green handing file in drawer.
- These are originals or single copies. ***Do not give these to clients. Make a copy if necessary.*** Note source on copy.
- You may ask staff to make copies for clients for free up to \$5.
- Most publications are in the main office filing cabinets.
- After use, replace brown folder and contents in correct corresponding green handing file.
- If you have suggestions for handouts/brochures to be considered for inclusion in the file, please place them in the labeled magazine rack on top of the file cabinet.

Please do not place directly into the file cabinet.

Computer (Also see Tab J: Computer)

- You may search the Internet to aid in diagnosis, ***but always return to the PNW Management Handbooks for management recommendations.***
- If using the computer look for websites with information relevant to the Northwest. **Warning:** Some insects, plants, and their related problems aren't in the Northwest.
- You may direct clients to the OSU Extension publications website to download publications. (<http://extension.oregonstate.edu/catalog>)

Microscope (Also see Tab H- Microscope)

- Instructions on its use are on the bulletin board near the microscope.
- A 10x loupe, a dissection supplies are in the box next to the insect cabinet.

Extra time

- Familiarize yourself with reference books on desk and book shelf.
- Review resources in the file drawers in the MG office.
- Familiarize yourself with the MG office computer. (See Tab J: Computer)
- Visit some of the websites in the MG office computer Favorites list.
- Explore the Insect cabinet to learn about the critter brought to the MG office.
- Check out the soft bodied insect/spider vials on top of the Insect Cabinet.
- Practice with other Master Gardeners on plant/insect problem diagnosis.
- Familiarize yourself with using the microscope. (See Tab H: Microscope)

End of shift

- Review Daily Log for completeness, make necessary additions.
- Count the contacts on the Daily Log and record the total at top left of that sheet.
Don't count the reminder calls to next day MG shift in the totals.
- File Daily Log sheet(s) in Daily Log binder.
- Place Referral forms uploaded to the MG Dx Forum in the brown folder.

Note: See Tab E for complete information about the referral procedure and use of the online MG Dx (Diagnostician) Forum.

- Put everything away and straighten bookshelves, desk and file cabinet.
- PM shift only: Back out of internet and turn off computer (See Tab J: Computer), close blinds, turn off lights and close door.