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Orientation to Extension

Introduction

Elected extension council members contribute immeasurably to the effectiveness of Iowa State University Extension and Outreach by helping to develop and implement local programs and by securing needed resources. Extension programs are an important part of the outreach effort of Iowa State University. Council member input ensures that a planned sequence of educational experiences addresses county needs.

Through your work as a council member, you will use and further develop your communication skills and insights about local issues and problems. In addition, you will gain knowledge and satisfaction from developing educational programming that addresses locally identified priorities. Your focus on leadership will benefit both you and the communities you serve.

As an elected representative for the people of Iowa, you are responsible for understanding the law as it relates to extension. This manual provides a brief history of extension; outlines the powers, duties, limitations, legal provisions, organization, roles, and operations of the council; and details extension district responsibilities related to Iowa's open meeting and public records laws. Please use this as a resource to help you through your term as an elected official.

Two Memorandums of Understanding bind our work.

1. Iowa State University Extension and Outreach has a formal agreement with the U.S. Department of Agriculture to explain federal and state partnerships.
2. Iowa State University Extension and Outreach, in turn, has a Memorandum of Understanding with each extension district as required by law, Iowa Code Chapter 176A. The MOU is developed cooperatively with input from council members, the Iowa Extension Council Association, and field and administrative extension staff. To learn more about the MOU, see Appendix 3 and the Iowa Extension Council Association website, www.iaextensioncouncils.org/mou-documents.

Iowa State University

To understand extension, you first need to understand Iowa State University.

Iowa State University is the state's land-grant university. The Morrill Act of 1862 established the national land-grant system of universities in the United States to make higher education accessible to all people. The Hatch Act of 1887 established a system of agricultural experiment stations at land-grant universities devoted to mission-oriented research. The Smith-Lever Act of 1914 was designed "to aid in diffusing" information to the people. Thus, the three primary missions of the land-grant universities became:

- undergraduate and graduate education,
- fundamental and mission-oriented research, and
- outreach programs that extend the knowledge of the university beyond its walls to enrich the lives of all citizens.

Iowa State University: Mission, Vision, and Goals - Strategic Plan 2017-2022

Mission

Create, share, and apply knowledge to make Iowa and the world a better place.

Iowa State University's focus has always been its students. The university emphasizes learning by doing. Iowa State students take advantage of many opportunities to engage in real-world class experiences and cutting-edge research, to study in other countries, and to test their leadership skills in 800-plus campus organizations. They are tomorrow's leaders and problem solvers, and they're ready to get started. In

addition to educating students, Iowa State faculty and staff are conducting basic and applied research to improve lives and sustain the planet. They are boosting crop production, protecting natural resources, perfecting biobased fuels, refining wind turbines, designing human and animal vaccines, improving firefighting gear, fighting Parkinson's disease, fostering economic growth and development, strengthening forensic science techniques, assessing the effects of media violence, devising defenses against cyberattacks, enhancing the quality of life through the arts and humanities, and educating the leaders of tomorrow. As a member of the Association of American Universities and the Association of Public and Land-grant Universities, Iowa State University is dedicated to conducting research and scholarship with local, national, and international impact.

As the land-grant institution in the first state to adopt the Morrill Act, Iowa State University wholeheartedly supports the mission of sharing knowledge beyond the campus borders. It's no surprise that Iowa State pioneered the first statewide extension service in 1906. The extension experiment – universities actively transferring their research and expertise to every corner of every state – was immensely successful across America and remains so today. More than one million Iowans annually benefit directly from ISU Extension and Outreach programs.

As the world has gotten smaller, the scope of Iowa State University's mission has increased. Iowa State faculty, staff, and students are dedicated to improving lives around the nation and the world. The Center for Statistics and Applications in Forensic Evidence is helping to improve forensic evidence to create a more objective criminal justice system. The Center for Sustainable Rural Livelihoods helps support a longstanding program to help Ugandans improve farming, launch home businesses, keep children in school, and build food security. Through these activities and many others, Iowa State presses forward, on a mission to help make the world safe and sustainable for generations to come.

Vision

Iowa State University will lead the world in advancing the land-grant ideals of putting science, technology, and human creativity to work.

Iowa State University has the talent and the facilities to lead the urgent, global quest for solutions. Providing these solutions and preparing the next generation of leaders and problem solvers requires efforts from across campus. It is the combination of all of our academic colleges, units, and departments that create the community of scholars necessary for this work. This university is and always has been a community of practical, hardworking problem solvers. Major investments in new research and educational facilities and an outstanding tradition of cross-disciplinary research bring all our colleges and departments together with global partners. Iowa State is dedicated to the belief that with hard work and innovation, future generations will have ample food and fuel, good health, and a safe, bountiful planet.

Goals

Demand for an Iowa State University education is at an all-time high, thanks in part to first-rate programs, a rich student experience, excellent faculty and staff, a beautiful campus, affordable access, and high job-placement rates.

Goal 1: Ensure access to the Iowa State experience – including an exceptional education offering practical, global, and leadership experiences that shape the well-rounded citizens and informed critical thinkers needed in the 21st century.

Goal 2: Enhance the university's research profile by conducting high-impact research that addresses the grand challenges of the 21st century.

Goal 3: Improve the quality of life for all Iowans through services and programs dedicated to economic development and the promotion of healthy communities, people, and environments.

- **SUBGOAL 3.1** Increase the number of Iowa public, private, and non-profit sectors that receive

direct assistance or benefit from engaging with the university's programs, services, and initiatives.

- Metric S3.1A Impact of ISU Extension and Outreach programs (e.g., number of Iowans participating in research-based educational programming in the areas of agricultural and natural resources, community, youth, family, and economic development)

Goal 4: Continue to enhance and cultivate the Iowa State University experience where faculty, staff, students, and visitors are safe and feel welcomed, supported, included, and valued by the university and each other.

See Appendix 6, Learning Module 10, or find the full Iowa State University strategic plan at <http://strategicplan.iastate.edu>. See Appendix 1 for the Iowa State University organizational chart.

What Is Extension?

The Smith-Lever Act of 1914 established the Cooperative State Research, Education, and Extension System as a partnership between the United States Department of Agriculture and the nation's land-grant universities. Subsequent state legislation enabled local governments or organized groups in the nation's counties to become a third legal partner in this endeavor.

The extension system was created to be a dynamic institution that would modify its programs and outreach in response to new knowledge, changes in client needs, and alterations in the socioeconomic landscape. The Smith-Lever Act's simple, yet enduring charge is to:

“. . . aid in diffusing among the people of the United States useful and practical information on subjects relating to agriculture . . . home economics, and rural energy, and to encourage the application of the same . . . extension work shall consist of the development of practical applications of research knowledge and giving of instruction and practical demonstrations of existing or improved practices or technologies in agriculture . . . home economics, and rural energy, and subjects relating thereto to persons not attending or resident in said colleges in the several communities, and imparting information on said subjects through demonstrations, publications, and otherwise and for the necessary printing and distribution of information . . .”

Each partner – local, state, and federal – has considerable autonomy in funding, staffing, and programming. Extension provides direction for research and education efforts and speeds application of research information and discovery. Two-way communication between those who work for extension and those who use it ensures researchers and educators of an early awareness of issues.

Nationally, thousands of extension professionals and paraprofessionals, and millions of volunteers, support this partnership and magnify its impact. Strong linkages with both public and private external groups are crucial to extension's strength and vitality.

The following facts help answer the question, “What is extension?”

- Extension is educational in program content and methodology, not regulatory or financial. It is attached administratively to the land-grant university system and is a major part of it, rather than being attached directly to state government.
- Extension provides informal, noncredit education conducted primarily beyond the formal classroom for all ages.
- Extension educates by helping people identify and understand their needs and problems and use new technology or information to solve them.
- Extension features the objective presentation and analysis of factual information for decision making and application by people themselves.
- Extension functions as a nationwide educational network and resource through local offices that

- are semi-autonomous units accessible to and subject to influence from local citizens.
- Extension involves cooperative but not necessarily equal sharing of financial support and program development among its partners.
- Extension involves funding and administrative relationships that permit educational programs directed at broad national purposes yet serve specific needs and priorities locally.

ISU Extension and Outreach Strategic Plan 2017-2022

Read our strategic plan at www.extension.iastate.edu/vp/strategic-plan.

Vision: ISU Extension and Outreach will advance land-grant values by engaging all Iowans in solving today’s problems and preparing for a thriving future.

Mission: ISU Extension and Outreach builds a strong Iowa by engaging all Iowans in research, education, and extension experiences to address current and emerging real-life challenges.

Core Values: The [Extension Professional’s Creed](#) embodies ISU Extension and Outreach’s core values for building a strong Iowa in partnership with all Iowans.

Goal 1: Engage all Iowans with access to research-based education and information.

- Strategy 1:** Create educational experiences with Iowans so they make well-informed decisions, apply knowledge, and use innovations in ways that build the economy and enhance the quality of life.
- Strategy 2:** Provide accessible and understandable research-based information to decision makers.
- Strategy 3:** Form partnerships inside and outside Iowa State to extend access to education to all Iowans.
- Strategy 4:** Gather feedback from Iowans to inform further research and programming needs.
- Strategy 5:** Collaborate across the university to create opportunities with Iowa State students to achieve ISU Extension and Outreach’s mission.

Goal 2: Build capacity for council members, faculty, staff, and volunteers.

- Strategy 1:** Develop and support a structure to sustain professional development with council members, faculty, staff, and volunteers that fosters the production and dissemination of applied research and educational programming.
- Strategy 2:** Promote pathways for Iowans to pursue current and future ISU Extension and Outreach employment and volunteer opportunities.
- Strategy 3:** Invest in new staff orientation and mentoring offerings to guide professionals’ successful navigation within the ISU Extension and Outreach, Iowa State, and/or county extension systems.

Goal 3: Enhance efforts in programming, operations, and staffing to reach diverse and underrepresented populations.

- Strategy 1:** Expand advertising, communications, and collaborative efforts with University Human Resources to recruit, hire, onboard, and retain diverse faculty and staff.
- Strategy 2:** Integrate partnerships that support inclusion and involve underrepresented audiences within each ISU Extension and Outreach program and service unit.
- Strategy 3:** Include faculty and staff efforts related to diversity, equity, and/or inclusion within annual performance reviews.
- Strategy 4:** Strengthen professionals’ competencies in working with diverse and underserved audiences.

Programs Aligned with ISU Colleges

We deliver on our purpose through program areas aligned with Iowa State University colleges:

- 4-H Youth Development in K-12 youth outreach across Iowa State University.
- Agriculture and Natural Resources in the College of Agriculture and Life Sciences.
- Community and Economic Development in the College of Design.
- Human Sciences in the College of Human Sciences.

How ISU Extension and Outreach Operates

We have over 900 faculty and staff on campus and across the state in 100 county offices. Some are Iowa State University employees and others are county employees. More than 8,000 Iowans volunteer for ISU Extension and Outreach. Nine hundred local citizens serve on county extension councils providing grassroots direction for program development in communities across Iowa. Learn more about the history of extension in Iowa in Appendix 6, Learning Module 8 and find a historical timeline. See Appendix 2 for a link to the ISU Extension and Outreach organizational overview and leadership charts.

County Services

County Services delivers support, expertise, and resources of Iowa State University to extension districts for county-based educational programs. We build partnerships designed to help Iowans solve today's problems and prepare for the future. One hundred extension districts are established by Iowa Code Chapter 176A and act in agreement with Iowa State University and the USDA as stated in memorandums of understanding.

Council Operations

Council Purpose

County extension councils are authorized by Iowa Code 176.A (link to law, Appendix 4) *“to provide for aid in dissemination among the people of Iowa useful and practical information on subjects relating to agriculture, home economics, and community and economic development, and to encourage the application of the information in the counties of the state through extension work to be carried on in cooperation with Iowa State University of Science and Technology and the United States Department of Agriculture as provided in the Act of Congress known as the Smith–Lever Act, adopted May 8, 1914.”*

Council Structure

Extension’s local presence is defined in Iowa Code 176A: *“Each county, except Pottawattamie, is constituted and established as a ‘county agricultural extension district’ . . . Pottawattamie County shall be divided into and constitute two districts”*

Council Size and Terms

Each council has nine members. Each member must be a resident registered voter of the extension district. Council elections are held in each extension district biennially at the time of the general election. Each council appoints a four-member nominating committee charged with nominating candidates who represent the diversity of the county. All registered voters of the extension district are entitled to vote in the election. See the Council Recruitment section of this notebook for more information on the nominating process. Typically, council members serve four-year terms. The term starts on the first day of January, unless it is a Sunday or a legal holiday, following the date of the member’s election. There are no term limits.

The Iowa Code includes a specific course of action if a council member resigns mid-term. The council is to fill all vacancies in its membership by appointing a resident registered voter of the extension district to finish the unexpired term. However, if the unexpired term in which the vacancy occurs has more than 70 days to run after the date of the next pending election and the vacancy occurs 74 or more days before the election, the vacancy shall be filled at the next pending election.

Council Leadership

The primary council leadership positions are chairperson, vice chairperson, secretary, and treasurer. Officers should have council or other relevant leadership experience. Suggested qualifications and duties for each position are included in Appendix 6, Learning Module 9.

Councils should elect officers at the first council meeting each year. Councils should consider skill level and rotation of officers. The election should proceed through a vote of the membership, with a quorum present, and should be recorded in the meeting minutes.

Duties of council officers, as defined by Iowa Code 176A.14, are as follows:

1. *“The chairperson of the extension council shall preside at all meetings of the extension council, have authority to call special meetings of said council upon such notice as shall be fixed and determined by the extension council, and shall call special meetings of the extension council upon the written request of a majority of the members of said council, and in addition to the duties imposed in this chapter perform and exercise the usual duties performed and exercised by a chairperson or president of a board of directors of a corporation.*
2. *The vice chairperson, in the absence or disability of the chairperson, or the chairperson’s refusal to act, shall perform the duties imposed upon the chairperson and act in the chairperson’s stead.*
3. *The secretary shall perform the duties usually incident to this office. The secretary shall keep the*

minutes of all meetings of the extension council and, within five days of the meeting, submit the minutes. The secretary shall sign such instruments and papers as are required to be signed by the secretary as such in this chapter and by the extension council from time to time.

4. The treasurer shall oversee, receive, deposit, and have charge of all of the funds of the extension council and pay and disburse the same as in this chapter required, and as may be from time to time required by the extension council. The treasurer shall keep an accurate record of receipts and disbursements and submit a report thereof at such times as may be required by the extension council.

5. Each of the officers of the extension council shall perform and carry out the officer's duties as provided in this section and shall perform and carry out any other duties as required by rules adopted by the extension council as authorized in this chapter. . . .The treasurer of the extension council, within ten days after being elected and before entering upon the duties of the office, shall execute to the extension council a corporate surety bond for an amount not less than twenty thousand dollars. The bond shall be continued until the treasurer faithfully discharges the duties of the office. The bond shall be filed with the county auditor of the county of the extension district. The county auditor shall notify the chairperson of the extension council of the bond's filing in the auditor's office. The cost of the surety bond shall be paid for by the extension council."

Those elected to council leadership positions constitute the executive committee.

Governance, Management, and Service Delivery

Councils have been given a large and complex responsibility. Councils that create a solid foundation through **governance** for their employees create a pleasant, successful work environment.

Governance means: listening to the citizens, anticipating and focusing on issues, determining vision and values, decision making on direction and resources, setting the "tone" for the county, monitoring performance, educating the citizenry, and mobilizing support in the community. Employees have the tools to do their job through management and service delivery.

Management means: analyzing issues; developing professional recommendations; implementing goals, priorities, and policies; developing programs and systems; setting the "tone" for the organization; and day-to-day administration. This is the role of the county director and regional director.

Service delivery means: providing quality services and products, implementing decisions and programs, developing operational plans and tactics, responding to citizen problems, organizing and developing work units and employees, and evaluating services and citizen impact. This is the role of ISU Extension and Outreach staff.

Council Duties and Responsibilities

Extension councils function as a legal body and are the local partner in the federal, state, and county relationship. As elected officials, the members of the council represent the diverse groups, issues, and concerns of their county agricultural extension district. The council identifies needs related to public and private enterprises, families, and communities, and provides the link to ISU Extension and Outreach. The council helps build the partnership with its communities and other agencies to secure resources and provide support for staff. With these roles in mind, the council operates in the area of **governance** most of the time.

Find the extension council job description in Appendix 5. Additional extension council responsibilities for the entire council and individuals are explained in Appendix 6, Learning Module 2. Keep Appendix 11, Council Ideals, handy as it summarizes the importance of a council member's responsibilities.

Council members are recruited for their talents and connections and should be directed to specific roles for which they are best suited. Likewise, council members have their own reasons for volunteering and the roles assumed should meet their needs for involvement. People place greater value on involvement and show increased commitment to a task when well matched to their role. While the work of the county extension council may at times feel like a volunteer position, it is an elected position guided by Iowa Code Chapter 176A. See Appendix 6, Learning Module 18, Extension Councils: Elected Positions versus Volunteer Service.

Effective Council Members

Informed. Engaged. Loyal. Innovative. We believe that effective council members are well informed of the programs and resources available through ISU Extension and Outreach. They are engaged in the activities of the extension council. They are loyal and believe in the mission of extension and are willing to explore new ideas on how extension can better serve their communities.

Know your responsibilities as a council member. Take the time to prepare for your council meetings. Review the minutes before the meeting – these serve as the official record of decisions made by the council, so it is critical that these are accurate. Look at the agenda to see what is going to be discussed, then give some thought to your opinions on the issues so you are prepared to contribute to the discussion.

Be an active participant in your council meetings. Contribute your ideas and suggestions, particularly when you have concerns. Keep in mind that once a decision is made, it is your obligation as a council member to support the decision. The time to express concerns is while a decision is being considered, so speak up.

One of your responsibilities as a member of the council is to represent your constituents, and in order to do that you have to be connected to the community. Be aware of issues being discussed in the news as well as the coffee shop. Talk to people you know about their opportunities and challenges.

A big challenge for council members is to be knowledgeable of the breadth of programs and resources available. Look for opportunities to participate in programs being offered, particularly in areas you may not be familiar with. Explore your county extension office website to see what's available and pay attention to the reports county staff, state program specialists, and regional directors provide you.

Tell others about the resources from Iowa State University Extension and Outreach. Don't be a stranger and get to know your county staff, program specialists, and state staff. Take part in statewide opportunities like the Iowa Extension Council Association conference and their legislative day at the Iowa State Capitol. Support council decisions and be aware of and avoid conflicts of interest.

Council Training

Professional development for staff and council members is a priority for ISU Extension and Outreach. To address identified needs, professional development opportunities are created and made available through ISU Extension and Outreach County Services. The [County Services](#) website provides resources to help council members increase their knowledge and effectiveness. Topics include finances, roles and responsibilities, risk management, county insurance, and more.

www.extension.iastate.edu/countyservices/council

It is intended that council members have the opportunity for training year-round. A suggested monthly learning calendar is listed in Appendix 6, Learning Module 1. Appendix 6 contains learning modules that include various topics for additional self-directed training.

Council Operating Procedures

Operating procedures or standing rules are adopted every January at the organizational meeting. These rules define how the council and the meetings are to be run. Council responsibilities derive from the Iowa Code and the local extension office. These responsibilities remain fairly constant from year to year and are annualized in calendar form in Appendix 6, Learning Module 3.

Meetings

The Iowa Open Meetings Law, Iowa Code Chapter 21 (Appendix 7 for link to law, and Appendix 6, Learning Module 20), defines a meeting as *“a gathering in person or by electronic means, formal or informal, of a majority of the members of a governmental body where there is deliberation or action upon any matter within the scope of the governmental body’s policy-making duties. Meetings shall not include a gathering of members of a governmental body for purely ministerial or social purposes when there is no discussion of policy or no intent to avoid the purposes of this chapter.”*

Chapter 21.4 states:

- 1. “A governmental body, except township trustees, shall give notice of the time, date and place of each meeting, and its tentative agenda, in a manner reasonably calculated to apprise the public of that information. Reasonable notice shall include advising the news media who have filed a request for notice with the governmental body and posting the notice on a bulletin board or other prominent place which is easily accessible to the public and clearly designated for that purpose at the principle office of the body holding the meeting, or if no such office exists, at the building in which the meeting is to be held.*
- 2. Notice conforming with all of the requirements of subsection 1 of this section shall be given at least twenty-four hours prior to the commencement of any meeting of a governmental body unless for good cause such notice is impossible or impractical, in which case as much notice as is reasonably possible shall be given. Each meeting shall be held at a place reasonably accessible to the public, and at a time reasonably convenient to the public, unless for good cause such a place or time is impossible or impractical. Special access to the meeting may be granted to persons with disabilities.*

When it is necessary to hold a meeting on less than twenty-four hours’ notice or at a place that is not reasonably accessible to the public, or at a time that is not reasonably convenient to the public, the nature of the good cause justifying that departure from the normal requirements shall be stated in the minutes.”

Agendas

In conjunction with the extension council and extension staff, the regional director will create extension council agendas and board packets. One technique is to use time at the end of each meeting to consider agenda items for the next meeting, grouping items into three categories:

1. Decisions that need to be made.
2. Issues for group discussion.
3. Information that needs to be provided (reports, data, etc.).

This technique allows for assigning of responsibility and for building continuity between meetings. The Iowa Open Meetings Law requires that the agenda explaining the proposed actions be posted at the extension office and the meeting place (if other than the office) at least 24 hours in advance of the meeting. Council members should receive a tentative agenda and appropriate attachments at least one week before the meeting. For agenda procedures, see Appendix 9.

Voting Requirements

A quorum of five is a fixed minimum number of eligible members who must be present at a meeting before any official business may be transacted or a decision taken, therein becoming legally binding. The exception is if the number of eligible board members falls below five (in other words, five members have resigned or passed away), the default quorum is a majority of members. In most council issues, a simple majority will pass a motion. Minutes shall show the results of each vote taken and information sufficient to indicate the vote of each member present.

Parliamentary Procedure

Councils should decide how they will conduct their meetings. Most councils adopt Robert's Rules of Order at their January organizational meeting. Appendix 10 contains a link to purchase the "Simplified Parliamentary Procedure" booklet from the [Extension Store](#), product number 5347. Please note the information is general and some items do not always apply to public entities.

Attendance

Effective meeting management and proper valuing of input is critical to members' attitudes toward meetings. It is the responsibility of the council chair and other council members to develop the agenda to create interest in attending meetings. Electronic meeting notices or reminder calls the day of a meeting have proven effective.

Council Member Ideals

Each council member is asked to follow the Council Member Ideals in Appendix 11. This document outlines appropriate behavior related to effective council activity.

Council Committees

Committees help councils accomplish goals, and the experience also can be rewarding for individual committee members. Councils include people with diverse skills and backgrounds. Council members are more likely to make a significant contribution and be pleased to serve if committee appointments capitalize on individual assets.

Committees can:

- Take on some of the work of the council, helping to fulfill stated roles.
- Increase efficiency of taking action at regular meetings.
- Provide an opportunity for individuals to do the kind of work for which they are especially suited (i.e., committee members should be handpicked).
- Capitalize on the training and experience of a wider representation of the organizational membership. More ideas for creative solutions can lead to more meaningful programs and an improved organization.
- Expand the diversity of participation so that programs are more likely to be solidly grounded in the needs and desires of the people being served.
- Provide more contacts and access to resources to accomplish the ends of the organization.
- Offer members the opportunity to learn more about the organization.
- Contribute to the development and identification of individuals who may later be recommended for council membership.

Advantages of Committees:

- With fewer people, each member has more opportunities to take part.
- In a committee, the procedures can be more informal.

- If members are handpicked for the job, committees are more likely to have persons interested in the task at hand. Larger groups often are hampered in their progress because they are more likely to include individuals who are not interested in, or familiar with, the problem.
- Delicate, controversial, or embarrassing subjects can be handled more easily.
- Committees are more flexible in their ability to consult outside experts.
- It is much easier to convene a small group than a large one.
- A small group can operate more efficiently, particularly when a large number of choices are available. For example, a small group can narrow the alternatives to be presented to a larger group.

Committee Operation

Review Appendix 6, Learning Module 21, General Committee Guidelines for Extension Councils, which includes a Committee Action Report template to use when reporting to the council and outlines general duties of committee members.

Extension councils benefit from the work of various committees of the council. Committees are made up of council members who research and prepare background information to present recommendations to the entire council. Committees cannot authorize decisions without full council approval.

A committee and its members must understand the reason for their appointment. A clearly defined purpose is critical to committee effectiveness. It is best to state in writing: the name of the committee, whether it is a standing or ad hoc committee and what the term is expected to be, what the purpose of the committee is (and therefore the boundaries), what specific duties and responsibilities exist, who the chairperson is, who the committee members are, the time of reporting to the council, how committees relate to one another or to the council, etc. Committees need to know where and how they fit into the bigger picture. They will best serve extension if they understand the broader work of extension and develop a sense of shared mission and pride. Like the council, committees should have an agenda distributed in advance and minutes should be recorded. Committees should evaluate their effectiveness just as the council does, though the questions will need to be tailored to the charge of the committee.

Committee Membership

The council chairperson may appoint committees and their chairpersons, or the process may be more informal. It is recommended that at least one member of the council serve on all committees to bring discussion and recommendations back to the council. The recommendation is no more than four members on a committee. Council members or the council chairperson might serve as ex-officio members as a function of their office. Council members appointed to committees should offer expertise useful to the committee.

Iowa Extension Council Association

In 1998, some forward-thinking extension council members worked with ISU Extension and Outreach to form the Iowa Association of County Extension Councils. This organization was formed to give a unified voice to county extension councils across Iowa.

The Iowa Extension Council Association serves as a vehicle for networking between county extension councils of Iowa, the vice president for extension and outreach, and government leaders to promote and strengthen all local and statewide extension programs. The association is led by a 25-member board with one representative per region and one representative for regions 15, 16, and 17 combined. Each region is represented by one director. Each board member serves as a liaison between the association and the county extension councils in the region.

The board of directors is elected by the council members of each region in the spring. Directors are elected to a three-year term running from July 1 to June 30. Any current member county may nominate one council member to run for the board of directors. Your extension council decides each year to be a member of the association by paying a membership fee in September.

The association purchases professional services on behalf of all 100 extension districts. Purchases have included legal services, volunteer background screening, and employee assistance programs. Because the association uses leverage and acts as a cooperative, individual districts have seen substantial savings. The association is instrumental in communicating and coordinating issues across the state.

Iowa Extension Council Association board members participate in committees and task forces in developing policies, hiring search committees, and developing the Memorandum of Understanding between counties and Iowa State University. The Iowa Extension Council Association is a strong advocate for its member counties.

Daily leadership of the association is by an executive director who works with the board and members of the ISU Extension and Outreach leadership team, representing councils on decision-making boards and committees that affect the functioning of councils. The Iowa Extension Council Association website is the place for timely topics, updates, and other resources to assist council members in fulfilling their role as a council member. Council members should refer to this website often for updates on topics affecting their council and county office operations. Council members should watch their email for regular updates from the association. This communication keeps council members up to date on topics that affect both extension councils and county extension offices. Keep informed through the website, www.iaextensioncouncils.org. See also Appendix 6, Learning Module 5.

Communicating with Policymakers

County extension council members are often asked to assist in communicating with policymakers. As the political environment is constantly changing, it is important to understand how to effectively build support through a continuum. Iowa State University Extension and Outreach has no control over environmental factors such as economic changes, energy crisis, environmental concerns, or the accelerating costs of medical care, but the organization can control the way it presents its message to policymakers. Appendix 6, Learning Module 15, Building Relationships and Communicating with Policymakers, gives council members communication guidelines when talking to policymakers.

Partnership Considerations

Many times, ISU Extension and Outreach is called upon to be a potential partner with other groups in collaboration and/or sharing staff and resources. Appendix 13, Partnership Considerations, is a guide for extension councils to use for decision making. There are questions to consider if the organization aligns with the mission of ISU Extension and Outreach. Sometimes extension councils may be called on to provide equipment or room space. Possibly the potential partnership clientele may need reasonable accommodations set up. Potential partners may be asking for staff time. Use the questions to think through and set expectations.

Council Recruitment

Recruitment is the starting point for all other aspects of a functioning council. Council effectiveness depends on individual members and their collective contributions. **Recruiting citizens whose contributions will enhance the effectiveness of the council is critical.**

Nominating Committee

As required by Iowa Code 176A.8, the extension council shall, *“at least ninety days prior to the date fixed for the election of council members, appoint a nominating committee consisting of four persons who are not council members and designate the chairperson. The membership of the nominating committee shall be gender balanced. The nominating committee shall consider the geographic distribution of potential nominees in nominating one or more resident registered voters of the extension district as candidates for election to each office to be filled at the election. To qualify for the election ballot, each nominee shall file a nominating petition signed by at least twenty-five eligible electors of the district with the county commissioner of elections ...”*

The recruitment process needs to be:

- **Purposeful and deliberate** – Identification of nominees needs to be done in a purposeful, deliberate manner, with advice from a variety of sources, including extension staff and key community leaders.
- **Future-focused** – Identifying council nominees should take on a future focus, not limited to the people and organizations who have been involved with extension in the past. It is important to gather together people who represent a range of experiences at different levels of familiarity with the work of extension.
- **Dynamic and ongoing** – The process of identifying council nominees should be dynamic and ongoing. As issues change, new members may need to be added to help the council address issues and/or to represent more diverse interests.

Identifying Needs

The nominating committee needs to be mindful of its obligation to represent diverse clientele needs throughout the area served. See Appendix 12 for the link to materials on becoming a council member and the Extension Council Nominating Committee Process and Orientation. Council membership should be selected with consideration given to diversity in:

- Race, culture, and gender.
- Geographic residence.
- Occupation, training, and experience.
- Organizational membership.
- Personal interests.

Anyone that is a resident registered voter can run for this office; however, special attention needs to be given to nominating individuals who represent audiences most affected by the priority needs and issues identified in the extension educational plan of work.

A tool that can assist the nominating committee in ensuring diversity, and the inclusion of individuals with needed skills and backgrounds, is a council composition grid. This grid lists each current and recommended council member along with his or her qualifying characteristics. The grid provides a more visual mechanism for summing the various characteristics present on the council and for identifying deficiencies.

For example, by using the grid you might find that the majority of council members have lived in the county all their lives; thus, you are not tapping new residents. The nominating committee should determine those characteristics to be included on the grid based on their importance to the council and the county. At

a minimum, characteristics should include the diversity areas mentioned in this section.

Nominating committees and council members may need to do research to find more information about their communities before making a decision.

Identifying Prospective Recruits

Equipped with a better understanding of the current council composition and having identified any current or anticipated deficiencies in characteristics desired to be represented on the council, the nominating committee can then proceed to identify prospective recruits. Keeping in mind the characteristics being sought, lists of prospective council nominees can be derived from informal leaders of targeted audiences for programs, members of committees, staff, friends, familiar organizations, and community leaders. The nominating committee should seek out individuals who respect the extension organization and who are interested in its programs aimed at improving the lives of individuals and families within their communities. Prospective recruits should be willing to serve, committing to time for monthly meetings, committee meetings, and professional development. Personal qualities and/or abilities for prospective nominees include:

- Leadership and communication skills.
- Flexible and tolerant.
- Personal integrity.
- Cooperative spirit.
- Open-mindedness.
- Maturity of thought.
- Decisiveness.
- Organizational skills.
- People oriented.

Iowa law does not specifically prohibit or restrict employment of related individuals; however, refer to Appendix 6, Learning Module 19, to learn more about nepotism and why understanding it is important.

Recruiting

Seek Additional Information

The nominating committee's list of prospective recruits is likely to include several names — some well-known and others completely unknown. It is essential to know a person's background, interests, and time availability to assess whether he or she is a good fit for the council.

Prioritize List

Once the nominating committee has sufficient information on prospective recruits, the list could be prioritized by demographics, desired characteristics, or any other criteria. The nominating committee can then contact prospective recruits.

Make the Invitation

Consider sharing the [Become an Extension Council Member](#) promotional video. See also Appendix 12. A phone call is sufficient as an invitation to ask potential candidates to place their name on the ballot. Where a more formal process is desired, a letter of invitation may be sent accompanied by a flyer or brochure and the extension council member job description, Appendix 5. Inviting someone to consider becoming an extension council member is best accomplished through personal contact. The person selected to make a contact should be the one most likely to successfully connect with this potential nominee. In addition, local news releases that are posted on the extension website will assist in attracting new candidates.

Respond to Questions

During the process of recruiting council members, it is important to be able to answer questions about what this person will bring to the group, what his or her role will be, and how he or she will benefit from membership. These questions should be easier to answer having gone through the process of assessing qualifications and identifying needs. Issues to be discussed with the invitee include:

- **What type of commitment is a person making when joining an extension council?** They should be willing to be an active participant for at least four years, carry out the stated expectations of the council, work cooperatively with other members, and share information within his or her own social/business/community networks.
- **Why is this person being considered for the extension council?** Identify the connecting points between extension and the work that this potential council member is involved with (e.g., mutual interest in providing educational experiences for youth, offering educational resources concerning the environment, improving the economic viability in the area, etc.).
- **What are the benefits of serving on an extension council?** Council membership offers networking with others who share similar interests and concerns; opportunities to help shape extension programming efforts, which are important to local citizens; help to gather support for establishing and/or extending educational efforts around issues of concern in the area; and participation in leadership and issue-focused educational events.
- **What does extension need?** Council members provide help with identifying and framing issues of concern to local citizens, assist with evaluating community-based programming, and help communicate the value of extension's educational programming.

Timetable

Find a suggested timetable for recruitment (even years) on the County Services website, Extension Council Elections: Instructions and Forms, www.extension.iastate.edu/countyservices/extension-council-elections-instructions-and-forms.

Program Development

Our Goal

Because of its dynamic role in providing practical education to help people and society meet the challenges of change, extension re-examines and renews its program structures and priorities on a regular basis.

The goal of extension is to be a relevant, dynamic, and flexible organization able to make a significant impact on problems caused by rapid changes in the global economy, environment, demographics, family structures, values, social interaction, and sustainability of resources. These changes cut across issues and program areas and provide the broad context in which specific opportunities are identified for extension programming.

To meet the challenges of change, extension initiated the concept of signature issues programming to focus efforts around a specific need, problem, or concern. Issues provide a basis for establishing program objectives, selecting program content, allocating time and resources, selecting target clientele, and determining delivery methods.

For extension, issues are matters of wide public concern arising out of complex problems. Issues programming begins with the identification of important needs, and then proceeds to focus organizational resources, program content, and delivery methods to meet those needs.

Historically, many extension programs have focused on major issues or had their origins in the traditional discipline bases associated with extension and its clientele. While discipline-based programs will continue to be appropriate, especially to deal with technological solutions to problems, many of today's major issues are more complex and require long-term, multidisciplinary approaches. Thus, today's issues programming has its origin in matters of wide public concern, outside the context and disciplinary structures of the organization.

Extension exists at three levels — national, state, and county — and program planning occurs at all three levels. The issues change and become more specific at each level.

Extension Program Development

The National Institute of Food and Agriculture (NIFA) provides coordination for programming efforts that support base programs and national initiatives.

National Base Programs and Initiatives

Base programs are the major educational efforts central to the extension mission and common to most units of extension at all levels. Historically, they have been described as major projects, program areas, or core programs. Base programs support NIFA's six impact areas in which extension provides educational programming. The six impact areas are food security; nutrition and health; youth, families, and communities; environmental stewardship; agricultural systems; and energy and bioproducts. Base programs receive significant resources throughout extension at the national, state, and county levels. All states provide educational programming in these areas with varying emphasis. They are the ongoing priorities of extension, involving many discipline-based and multidisciplinary programs. They can be thought of as extension's foundation.

National initiatives are extension's commitment to respond to important societal problems of broad concern with allocations of additional resources and significantly increased effort to achieve a major impact on national priorities. National initiatives are the current most significant and complex issues on which extension has the potential to make a difference, usually in cooperation with other agencies, groups, and

units of government. National initiatives usually arise out of one or more components of the base programs. National initiatives are in the spotlight for a period of time until a significant impact is achieved, the need has subsided, or the increased allocation of resources and effort result in the program becoming an ongoing part of base programs. Over the years, impact areas have included topics such as childhood obesity, climate change, food safety, global food security and hunger, and sustainable energy.

For more information about national base programs and initiatives, visit NIFA's website at <https://nifa.usda.gov/>.

Relationship of National, State, and Local Priorities

The national extension program includes various levels, each contributing to the overall goals of Iowa State University Extension and Outreach. Program objectives and activities become more specific as they move from the national level to the state and county levels of the system. Individual states and counties may give higher priority to different dimensions of the national initiatives, depending on needs. At the local level, programs become more precisely defined and focus on specific activities for certain clientele. For example, in the national initiative on water quality, state and local programs might address specific issues such as surface runoff, groundwater contamination, and use of fertilizers and pesticides.

While national initiatives address broad issues confronting many states, program development at the local level looks at county and region-based priorities, which are then communicated to the state level to join the research and knowledge base of the university. The result is a cohesive statewide program plan that relates to statewide and national issues. This statewide plan, in turn, becomes the basis for more specific program plans and related activities of extension staff to meet the priority needs of local citizens.

Iowa's Changing Demographics - Indicators Program

ISU Extension and Outreach provides multiple resources for Iowa data. The Indicators Program contains the most current data from multiple sources and is easy to use. Tools available through the Indicators Program make it easy to access information, create visual representations of data, generate maps to quickly identify trends and patterns, and make comparisons between cities, counties, or regions.

<http://indicators.extension.iastate.edu>

The Data for Decision Makers series continues to grow. County profiles now include general demographic and socioeconomic information; a health profile, which includes a variety of factors that contribute to community health; a housing profile that shows information on housing access and affordability, housing characteristics, and demographic information for householders; and a 4-H report, which includes a variety of 4-H data for each county. City Data for Decision Makers reports for every city in Iowa also are available. Reports for cities with populations over 350 are four pages, while reports for cities under 350 population are two pages. Data for Decision Makers reports also are available by Iowa Senate district, Iowa House district, and Iowa State University Extension and Outreach regions.

Regularly check the Data for Decision Makers reports as they are continually updated with current information about population, demographic and socioeconomic status, and other data topics of interest.

Diversity and Inclusion in Programming

Diversity and Inclusion

Diversity encompasses acceptance and respect by fostering an environment of inclusion that moves beyond simple tolerance to recognizing the richness in individual identities of people.

Iowa State University's Diversity and Inclusion programming for its campus and the surrounding area in Ames, Iowa, is conducted by the vice president of diversity and inclusion. ISU Extension and Outreach

follows the Iowa State University Principles of Community to create a safe place in which people can express themselves freely and share unique talents. The six principles that the university applies in celebrating and advancing diversity are respect, purpose, cooperation, richness of diversity, freedom from discrimination, and honest, respectful expression of ideas. www.diversity.iastate.edu/principles-of-community

ISU Extension and Outreach works to improve the lives of Iowans by building partnerships and providing research-based learning experiences. In that light, ISU Extension and Outreach provides a list of research-based classes on developing inclusive work environments and business partnerships on the Diversity and Civil Rights website, www.extension.iastate.edu/diversity/diversity.

ISU Extension and Outreach Civil Rights

ISU Extension and Outreach also has a systematic process for the assessment of compliance with state and federal civil rights programs. Consequently, ISU Extension and Outreach is committed to assuring that its educational programs and activities and employment terms and conditions are free from unlawful discrimination and harassment on the basis of age, color, creed, disability, gender identity, genetic information, national origin, pregnancy, race, religion, sex, sexual orientation, and protected U.S. veteran status. See Appendix 6, Learning Module 11, for a link to the Diversity and Civil Rights website. For details on the ISU Extension and Outreach Civil Rights Compliance Review process, see www.extension.iastate.edu/diversity/civil-rights. In particular, council members can find information regarding responding to reasonable accommodation requests, conducting internal compliance reviews, responding to allegations of discrimination and harassment, and other civil rights information.

Curriculum Review Process

The purpose of the curriculum review process within Iowa State University Extension and Outreach is to maintain consistent standards of quality and credibility. This process is intended for curricula that have not undergone internal review by one of the four ISU Extension and Outreach program areas. Curricula developed elsewhere may not be applicable to the state of Iowa for some reason such as climate, state law, general practices, or other valid reason. This policy is meant to ensure the appropriateness and permissions to use curricula from other sources.

Program Catalog

A program catalog is a list of programs that include curricula or other resources, products, and tools available to Iowans through ISU Extension and Outreach.

Curriculum

A curriculum is one aspect of a program. Any curriculum offered by ISU Extension and Outreach should be linked to the overarching program. A curriculum is designed to create a change in knowledge, behavior, or condition. A curriculum is a group of planned educational offerings offered face-to-face or virtually in a synchronous or asynchronous format, and generally includes a targeted audience, materials, exercises, activities, delivery methods, and evaluation process.

Curriculum Review

Curriculum review is the evaluation of the group of planned educational offerings with the purpose of maintaining consistent standards of quality and credibility. As an aspect of program development, curriculum review follows a process based on science and appropriate methodologies, uses a peer approval process, is evaluated and updated periodically, and respects the dates that program materials are scheduled to be discontinued.

The purpose of ISU Extension and Outreach is to bring research and science from the land-grant institution to the people. Recently there has been a movement to “evidence-based

practice,” an approach that requires the use of scientific research, its review, and linking this research to practice.

County Program of Work

Planning a systematic approach to county extension programming is one of the key responsibilities of the nine-member elected county extension council. We’ve developed road maps for the extension council and staff to follow as they provide research-based educational programs and services to the citizens in their communities. It offers a sequence of questions and considerations to address to make new and unique programming successful.

This plan should not include activities that we normally conduct, such as club calf weigh-in, private pesticide applicator training, or pressure gauge testing, unless there are new or major revisions of these events.

The County Program of Work documents are on the County Services website, www.extension.iastate.edu/countyservices/county-program-work. These documents should be used when reviewing Appendix 6, Learning Module 23.

Roles and Responsibilities

Program Development Process

All County, Field, and State Staff

Collect impact data and share stakeholder reports and success stories with clients, funders, partners, stakeholders, public policy leaders, and others.

Annual county stakeholder reports are the beginning, not the end product, of the extension stories we can share. We share our stories with stakeholders because they have a stake in our impact and outcomes. We share our stories with the public to build their awareness of the education and information we can provide. We share our stories with taxpayers and the elected officials who allocate precious public resources, so they understand their return on investment in ISU Extension and Outreach. A key to our success is making sure people know how we are working to build a strong Iowa. See Appendix 6, Learning Module 13, Stakeholder Reports and Success Stories, to learn more.

County Extension Councils

- When planning programs for your county, use the [County Program of Work](http://www.extension.iastate.edu/countyservices/county-program-work) documents, www.extension.iastate.edu/countyservices/county-program-work.
- Conduct informal needs assessment by listening to community clients and citizens.
 - Participate in formal needs assessment process.
 - Talk with program specialists to learn of emerging trends and needs.
 - Provide funding for programs.
 - Participate in training and development as appropriate.

Extension Finances and Procedures

The council's role in fiscal management is important in the success of extension. Each county has adapted the fiscal policy to meet fiscal oversight and should adhere to county policies and procedures. The policy is on the County Services website, www.extension.iastate.edu/countyservices/fiscal-policy-and-procedures. Council members should be aware of specific fiscal matters, especially items detailed in the Iowa Code. Because of the nature of extension funding, you may be called upon to speak about this topic to public groups, county and state officials, and funding sources.

As a council member, you should understand how the budget for your county is developed, what sources of funding are available, how funds are expended (generally), and how the county is accountable to its funders and other publics. Each county usually has a finance/budget committee that creates the budget and makes recommendations for the next fiscal year. The council makes final budget decisions and votes on the yearly budget. Working with county staff to develop and follow a budget is critical to successful financial oversight. See more on county finance, www.extension.iastate.edu/countyservices/county-finance.

Three-way Funding Partnership

As indicated in the Orientation to Extension section of this notebook, extension exists as a partnership representing federal, state, and local levels. This is a partnership in every way, including funding.

At each level, funding is provided to the university to support extension, special programs, and projects. Federal funds and state appropriations are managed at the state level, not the county level.

Federal Capacity Funds

Smith-Lever, Expanded Food and Nutrition Education Program (EFNEP), and Renewable Resources Extension Act (RREA) are examples of capacity funds received from USDA NIFA based on a formula created by the Smith-Lever Act of 1914. Funds are distributed to the 50 states and certain federal territories for Cooperative Extension Services connected to land-grant institutions. Capacity funds are appropriated on a federal fiscal year basis (Oct. 1 – Sept. 30), and the Smith-Lever allocation requires a one for one match. All funds are used to provide operational funding for departmental, center, and program support activities.

Federal Competitive Funding

Other federal funding received by ISU Extension and Outreach includes competitive funding that is managed in cooperation with the Office of Sponsored Programs Administration (OSPA) at Iowa State University. Examples of this type of funding include the Farm and Ranch Wellness program from USDA NIFA, AgMRC from USDA Rural Development, the Integrated Pest Management program from USDA NIFA, and many other projects that contribute toward staff salaries, travel, supplies, and other activities to support that specific program.

State Appropriations

State funds are appropriated on a state fiscal year basis (July 1 – June 30). ISU Extension and Outreach receives a line item appropriation from the Iowa Legislature each year specifically for departmental, center, and program-support activities. In addition, the university also appropriates general funds to support the extension program in the state of Iowa.

State Contracts

Contracts and other agreements are made between the university and state agencies on both competitive and non-competitive bases. Examples include the Iowa Department of Human Services for the Iowa SNAP-Ed Nutrition Program, help lines, ServSafe, and childcare programs. Iowa Department of Agriculture and Land Stewardship (IDALS) partners with Iowa State University for the Midwest Grape and Wine Industry Institute, water quality/worker protection programs, and others. The Iowa Department of Natural Resources

provides funding for the Iowa Learning Farms, the Manure Application Certification Program, and other programs for the betterment of Iowa's land and resources.

County Funds

All funds managed by the extension councils are public funds. County funds are those funds received by each extension district through the local taxing process that takes place through property tax levies. Councils also manage grants, fees, and contracts for specific programmatic areas. The extension council develops a budget, publishes a budget, and then holds a public hearing. When adopted, this budget is sent directly to the county treasurer for the collection of the funds. The tax levy rate and maximum dollar limitation vary based on the population of each district. According to Iowa Code 176A.8.12, these local funds are to be used for *“salaries, travel, expense of personnel, rental, office supplies, equipment, communications, office facilities and services, and in payment of such other items as shall be necessary to carry out the extension district program...”*

Local Budget Process

Extension Council Budget Timeline

The fiscal year for county extension districts is July 1 to the following June 30. Each year the 100 county agricultural extension districts prepare a budget well in advance of the fiscal year to meet their financial needs as well as follow the rules laid out in the Iowa Code and administered by the Iowa Department of Management. The budget preparation process begins in the fall (November-December) with council, budget committee, and staff discussions. Before any budget can be officially adopted, it must go through the public hearing process. For the public hearing to be held, proper forms need to be submitted on the IDOM website, making it available online, and published by the county extension office in official newspapers in a strict time-sensitive window before the hearing. Furthermore, before the posting and publishing take place, the council needs to approve what is referred to as a “work budget.” These steps are needed so the public has the opportunity to react to the preliminary budget plans of the council. Iowa law specifies that the budget must be adopted and filed properly with the county auditor before March 15 each year. A good practice is for the extension council to thoroughly review and approve the “work budget” at its January or February meeting. See Appendix 6, Learning Module 14, Budget Timelines. Find your county's budget report through the Iowa Department of Management, Appendix 15.

While the budgeting for next year is being worked on, the council simultaneously will review the actuals, the budget, and re-estimate a projected or revised budget for the current operating year. If projected expenditures are estimated to be higher than originally budgeted, even by one penny, an amendment to the expenditure limit will be necessary. An approved amendment is required for county agricultural extension districts to exceed current budget expenditures. No additional tax income can be levied during the year, only the expenditure side of the budget is amended. It is highly recommended amendments be completed before May 31 because of time-sensitive publication and public hearing procedures that must be followed.

Non-Tax Based County Funding

Iowa Code 176A.9.4 states: *“The extension council may collect reasonable fees and may seek and receive grants, donations, gifts, bequests, or other moneys from public and private sources to be used for the purposes set forth in this section, and may enter into contracts to provide educational services.”*

Carryover Funds

Iowa Code 176A.8.13 states: *“To carry over unexpended county agricultural extension education funds into the next year so that funds will be available to carry on the program until such time as moneys received from taxes are collected by the county treasurer. However, the unencumbered funds in the county agricultural extension education fund in excess of one-half the amount expended from the fund in the previous year shall be paid over to the county treasurer. The treasurer of the extension council with the*

approval of the council may invest agricultural extension education funds retained by the council and not needed for current expenses in the manner authorized for treasurers of political subdivisions under section 12C.1.”

Financial Reporting/Accountability

ISU Extension and Outreach and the county agricultural extension districts are public agencies created by federal and state law. These agencies are supported by tax dollars and therefore are subject to the open records law for public funds.

Extension council members are elected at-large during the general election and, as elected officials, are held accountable for the use of public funds. Extension council members may have to answer questions from auditors regarding the accountability of the public funds held within county extension accounts.

An extension council has the responsibility to minimize financial and legal risk related to public funds. One method of risk prevention is to develop, implement, and maintain sound fiscal policies and procedures for the operation of county extension programs. To be effective, these policies and procedures must include all money held or passing through the county extension office and be:

- Based on Iowa Code 176.A and Generally Accepted Accounting Principles (GAAP).
- Adopted by the extension council.
- Communicated to all employees, volunteer groups, and cooperating entities to provide guidance and direction in accepting and spending of public funds.
- Implemented in a consistent and effective manner.

Fiscal management is one of the important roles council members play. Study Appendix 6, Learning Module 22, Understanding Your Extension Council Financials. The role of extension councils in financial reporting and accountability is detailed below.

Responsibility

- The voucher report listing expenditures incurred since the last extension council meeting shall be submitted to the extension council for review and approval. Subsequent extension council minutes should reflect *“a consecutive range (#XXX to #XXX) of voucher/check numbers was approved.”*
- The extension council is legally responsible for all public funds defined as both tax and non-tax monies. Public funds include those raised and used by 4-H clubs, Master Gardener volunteers, and/or any other programmatic entity. The funds from these entities are defined as public funds by the State of Iowa Auditor’s Office in Chapters 176A, 24, and 12C.1 of the Iowa Code. Management oversight by extension councils includes, but is not limited to, developing budget, signing vouchers, auditing, bonding, signing checks, and reviewing financial reports for the county extension program. The fiscal policy authored in cooperation with the State of Iowa Auditor’s Office outlines the legal responsibilities and recordkeeping protocols.

Delegation of Responsibility

- The extension council may authorize a separate checking account and fund to handle income and expenses held in custodial capacity. If authorized, this fund is called the “Agency Fund.” Delegation of responsibility shall be limited to the payment of expenses for which the funds were collected and at the request of the entity owning the money.
- The extension council delegates the responsibility for the day-to-day operation of the fiscal policy to the county extension council treasurer or designee. The extension council treasurer or designee may delegate to appropriate support staff the implementation of predetermined procedures, e.g., bookkeeping, ordering, preparing invoices, and signing checks.
- At the annual January organizational meeting, the extension council may authorize the extension

council treasurer and/or other designated bonded extension council member to sign checks for the operating fund prior to the regular extension council meeting for employee payroll, if the compensation has been previously budgeted or approved by the extension council. Budgeted expenditures may include, but are not limited to, rent, utilities, program and office supplies, and contractual services.

Public Accounting of Fund

Annually, the extension council shall publish in two district newspapers before **Sept.1** a full and detailed report of all receipts and expenditures in the Operating Fund and Summary of Agency Fund for the last fiscal year consistent with Iowa Code 176A.8.16.

Audit

The Agricultural Extension Education, Tort, and Unemployment Funds are audited yearly by the State of Iowa Auditor's Office. If a written audit report is received, a copy shall be included in the extension council minutes.

Amending Fiscal Policy

Amendments to the fiscal policy shall be approved by the extension council at a regularly scheduled meeting.

Extension Accounts

Operating Account

The operating account is used to record and report all financial transactions of the county agricultural extension district. There are four funds that make up the operating account.

A. The County Agricultural Extension Education Fund is made up of four sub-funds:

1. **Tax Sub-fund** – Iowa Code 176A.12 requires that the county agricultural extension tax sub-fund be used to record income received from a tax levy (property tax, delinquent property tax, mobile home tax, utility replacement excise tax, military service/mobile home replacement tax, grain handled tax, mobile home elderly replacement/credit) and to record credits against levied taxes as a deduction from the total property tax due (homestead credit, elderly and disabled credit, disabled veterans homestead credit, ag land credit, family farm credit, and native prairie tax credit).
2. **Program Fee Sub-fund** – The Program Fee Sub-fund is used to record all transactions related to a fee-based program (i.e., funds which come to the county in the form of registration and/or user fees). Fees for service will be used to offset direct expenses and to support the specific extension program.
3. **Donor Restricted Sub-fund** – The Donor Restricted Sub-fund is used when a donor has designated a purpose for the use of the funds outside of the “normal” annual county operations. A donation is considered “donor restricted” if it has a specific purpose, is not part of the county’s normal annual operations, and if the council has written and signed documentation of the donor’s intent.
4. **Grants and Contracts Sub-fund** – The Grants and Contracts Sub-fund receives funds from private and public sources for specially funded extension programs that require a separate account for the funds.

B. Tort Liability Fund

Iowa Code 670.10 permits the extension district to levy a separate tax for the cost of tort liability benefits. This levy is in addition to the regular levy for the county agricultural extension fund; however, the tort liability levy is only allowed when the regular levy for the county agricultural extension fund is at its maximum limitation imposed by statute. These limitations for the extension districts are noted in Iowa Code 176A.10 and also in the Iowa Department of Management (IDOM) budget instructions. **The tort liability fund includes the district liability insurance costs, the public officials/errors and omissions liability cost, and the cost of background screening authorized volunteers, but not the office property**

premium, crime bond premium, nor workers compensation premium.

C. Unemployment Compensation Fund

Iowa Code 96.31 permits the extension district to levy a separate tax for the cost of unemployment benefits. This levy is in addition to the regular levy for the county agricultural extension fund; however, the unemployment compensation levy is only allowed when the regular levy for the county agricultural extension fund is at its maximum limitation imposed by statute. These limitations for the extension districts are noted in Iowa Code 176A.10 and in the IDOM budget instructions. Once the maximum levy limitation is reached, the extension district has the choice to:

1. Levy for unemployment compensation in addition to the regular levy for the county agricultural extension fund;
2. Levy for unemployment insurance with Iowa Workforce Development; or
3. Record unemployment claims as an expense in the county operating account.

Funds received from any separate additional levy must be used for the following purposes:

1. To pay unemployment premiums to become part of the state plan, or
2. To pay unemployment claims to Iowa Workforce Development.

Agency Account

This optional account is used to record and report transactions for an agency account established to hold funds in custody for an entity cooperating with county extension programs. **The agency account is for non-extension funds only.** Agency accounts typically involve the receipt, temporary investment, and remittance of assets to their rightful owners. Agency accounts are not to be co-mingled in the extension operating account. See Section 2.4 of the county fiscal policy.

Extension must **not** have the ultimate decision-making authority about the use of the accounts. To determine who does, consider these criteria:

1. Is the non-extension entity legally separate? If so, the legal entity has sole decision-making authority for the money held in the fund.
2. If any of the following apply, the extension council has the ultimate decision-making authority: Is the entity appointed by the extension council? Does the entity carry out any part of the extension program? Is the extension council able to, if so desired, impart its will on the entity? Does the extension council support the entity with other funding through the county operating account?

A summary of these fund accounts is also available in Appendix 6, Learning Module 22, Understanding Your Extension Council Financials.

Fiscal Oversight

The county extension council treasurer or designee shall present to the extension council the following monthly financial reports and minutes should reflect their approval:

- A balance sheet, which provides bank account balances, payroll liabilities, and fund balances.
- A voucher report, which lists the voucher/check number, name of vendor, amount of check, and total amount of expenditures.
- An extension council revenue and expense summary report, which shows the actual income and expense compared to the budget.
- Bank reconciliation report.

Also, the approved voucher report shall be attached to the minutes of the extension council meeting.

Extension Council Mileage Reimbursement Rate

Iowa Code 176A.9.6 states that extension districts can reimburse extension council members at the “state rate” as provided below. Reimbursement forms are available in the county office.

“Members of the council shall serve without compensation, but may receive actual and necessary expenses, including in-state travel expenses at not more than the state rate, incurred in the performance of official duties other than attendance at regular local county extension council meetings. Payment shall be made from funds available pursuant to section 176A.8, subsection 12.”

Legal Responsibilities

County Extension Law

County Agricultural Extension Law, Iowa Code 176A (Appendix 4), is the governing authority over the state and local partners for extension in Iowa. The law, among other things:

- Provides for the authorization of councils and sets forth their powers and duties.
- Specifies how extension councils will operate and handle county extension education funds.
- Sets the amount of local funds and provides for their appropriation. Council members should become familiar with the provisions of this law.

Iowa Open Meetings Law

Council meetings are subject to the rules of the Iowa Open Meetings Law, Iowa Code 21, Appendix 7. Learn more in Appendix 6, Learning Module 20.

“This chapter seeks to assure, through a requirement of open meetings of governmental bodies, that the basis and rationale of governmental decisions, as well as those decisions themselves, are easily accessible to the people. Ambiguity in the construction or application of this chapter should be resolved in favor of openness.”

This law sets forth several requirements for public bodies falling within its jurisdiction, the most significant of which are described here:

- Minutes are to include the date, time, and place of the meeting; the members present; and the action to be taken at each meeting. The minutes shall show the results of each vote taken and information sufficient to indicate the vote of each member present. The minutes shall be public records open to public inspection.
- An agenda for each regular meeting must be posted 24 hours in advance of each meeting *“at the principle office of the body holding the meeting, or if no such office exists, at the building in which the meeting is to be held.”*
- Meetings may only be closed to protect the public interest or safeguard personal privacy. The exceptions under which a meeting may be closed are very specific and can be found in the Iowa Code.

Council members should become familiar with the provisions of the Iowa Open Meetings Law as there are substantial fines for members of the council who violate any provision of this chapter of the code.

Examination of Public Records

The Iowa Open Records Law is a series of laws designed to guarantee that the public has access to public records of government bodies at all levels. The law includes all records of government agencies except documents that have been deemed confidential. Exemptions include:

- Personal information on accepted students, current students, and past students.
- Medical records.
- Trade secrets.
- Records of attorneys who represent the state.
- Reports that result in unfair competition.
- Appraisal information for public land purchases.
- Criminal files.
- Military confidential records.
- Personal information in records of employees and elected officials of public agencies.
- Library records.

- Information on the donors of charitable contributions.
- Corrections department information that would jeopardize security.
- Communications made to the government but not required by statute.
- Examinations.
- Archaeological and historical ecologically sensitive material locations and information.
- Marketing and advertising budgets and strategies for non-profits.
- Information maintained by mediators employed to solve disputes with government agencies.

Anyone can request public records in writing and the law does not require a statement of purpose for records requests. There are no restrictions for use of the records in the law, and you must allow for 10-20 days for a request to be completed. Council members should become familiar with provisions of the Iowa Open Records Law, Chapter 22, link provided in Appendix 8. Learn more about the importance of the Open Records Law in Appendix 6, Learning Module 20.

Memorandum of Understanding

ISU Extension and Outreach and the U.S. Department of Agriculture have a legal agreement, a Memorandum of Understanding (MOU), that explains extension's federal and state partnership. ISU Extension and Outreach, in turn, has a MOU with each extension district. These outline the responsibilities of each partner related to carrying out the mission of ISU Extension and Outreach. Council members should become familiar with the details of the MOU and addendums 1, 2, and 3. The addendums explain the roles and responsibilities of the regional director and county staff. The extension council has similar responsibility under all three models. All documents can be found on the Iowa Extension Council Association website, www.iaextensioncouncils.org/memorandum-understanding.

County Fair Partnership Agreements

County fairs are important to rural communities and honor Iowa's agricultural heritage and culture. Their success depends on a lot of hard work and planning from many different people and collaboration among organizations. In particular, the Iowa Fair Board, Iowa State University Extension and Outreach and FFA chapters work together to provide youth a positive educational experience for developing confidence, leadership, and integrity.

To help facilitate communication and planning for a successful fair for youth and fair goers, a committee representing the Association of Iowa Fairs, Iowa State University Extension and Outreach, and Iowa FFA developed a County Fair Partnership Agreement template. This written document is particularly important as new people join the discussion. Refer to Appendix 6, Learning Module 7, or visit www.extension.iastate.edu/countyfairmou/.

Affirmative Action for Programs

The role of ISU Extension and Outreach is to be responsive to changing educational needs in Iowa counties. As societal issues and demographics of Iowa change, the cultural backgrounds and linguistic characteristics of our clientele are changing. We welcome new clientele and strive to make their educational experience as relevant and effective as extension education traditionally has been for residents of our state.

In addition to acting on our educational mission, as a recipient of federal financial support, Cooperative Extension has a responsibility to make reasonable steps to provide individuals who have limited English proficiency with meaningful access to educational programs and activities. This responsibility is outlined in Executive Order 13166, issued Aug. 11, 2000. Limited English proficient individuals are those who do not speak English as their primary language and who have a limited ability to read, write, speak, or understand English.

Title VI of the Civil Rights Law of 1964 and its accompanying regulations prohibit Cooperative Extension from discriminating on the basis of race, color, or national origin. Language is usually tied to national origin. Discrimination on the basis of national origin can occur if Cooperative Extension does not provide appropriate language assistance to those with limited English proficiency because these individuals will not have access to the same benefits, services, information, or rights that Cooperative Extension provides to everyone else. No one can be excluded from participation in programs or denied equal employment opportunity because of birthplace, ancestry, culture, or linguistic characteristics common to a specific ethnic group.

4-H Name and Emblem

Introduction

The 4-H emblem is the national symbol of Cooperative Extension's 4-H program supported by the United States Department of Agriculture (USDA). This program is defined as the youth education and outreach component of Cooperative Extension Services (CES) at land-grant institutions and is implemented by CES as a means for land-grant institutions to carry out responsibilities funded under the Smith-Lever Act, 7 United States Code 341.

The 4-H name and emblem are federal marks, protected by Public Law 18 U.S.C. 707, and entrusted by Congress to the Secretary of Agriculture, with authorized use by 4-H clubs across the nation, the representatives of USDA, land-grant institutions, and persons authorized by the Secretary of Agriculture. Within the 4-H name and emblem rules and regulations, use also extends to the National 4-H Council, which supports national and state 4-H programs through cause marketing, fundraising, brand management, communications, and legal and fiduciary services.

These guidelines were created to ensure that the authorization and use of the 4-H name and emblem remains consistent and appropriate. Ultimately, these guidelines were developed to protect the treasured 4-H name and emblem, and to ensure that authorized use benefits and supports the 4-H Youth Development Program, aligns with the principles of 4-H positive youth development, and does not in any way hurt the image of 4-H by association. For additional information or questions about these guidelines, please contact the youth program specialist serving your county and/or the campus 4-H office.

General Information

The director of USDA National Institute of Food and Agriculture (NIFA) is responsible for authorizing use of the 4-H name and emblem that crosses state geographic borders. Authorization within a specific state is delegated to the CES office at each land-grant institution. State 4-H offices (through delegation by their land-grant institution's Cooperative Extension office) are responsible for any 4-H name and emblem authorizations that cross local jurisdictions but are contained within the state's geographical boundaries. The term "state" can be interchanged with "land-grant institution" (1862, 1890, and 1994) and is inclusive of U.S. territories and the District of Columbia.

Local 4-H offices (through delegation by their state 4-H office) are responsible for any 4-H name and emblem authorization limited to their local area of jurisdiction. "Local" may refer to a county, parish, borough, region, district, or other term depending upon the structure of the 4-H program within an individual state.

Using the 4-H Name

The official 4-H Name includes 4-H, 4-H Youth Development, and 4- H Youth Development Program. When using the term "4-H," it is to be written as numeral "4," separated from a capital "H" with a hyphen (not a dash, slash, or space). The 4-H emblem may not be used in place of the word "4-H" in a title or text, or to replace an individual letter within a word.

Using the 4-H Emblem

The official 4-H emblem is a green four-leaf clover with a white letter “H” in each leaf and the stem turned to the right. The emblem may be two-dimensional (flat) or three dimensional (with shadows that show depth and perspective). The 4-H emblem may not be altered in any way. Use of the emblem includes the responsibility to communicate the significance of the 4-H name and emblem as a government-owned emblem that is protected by federal statute. The insignia “18 U.S.C. 707” provides the legal obligation to correctly inform the public of the federal protections and consequences of potential misuse.

For additional information regarding use of the 4-H name and emblem, including graphic standards, use in promotion, and use in fundraising, please consult Appendix 17, “4-H Name and Emblem Use Handbook (2019), <https://nifa.usda.gov/sites/default/files/resource/fy-2019-4-h-name-emblem-use-guide-20191108.pdf>. Extension staff also follow the Iowa 4-H Style Guide found on the for staff only intranet site, MyExtension, <https://my.extension.iastate.edu/4-h-marketing-and-branding-guidelines>.

4-H Clubs Use of 4-H Name and Emblem – Charters

Per federal regulation 7 CFR 8, www.law.cornell.edu/cfr/text/7/part-8, 4-H clubs and groups that have been officially recognized are authorized to use the 4-H name and emblem. Official 4- H charters are the only documentation that officially recognize clubs and groups as 4-H. State and local charters that do not include a USDA signatory are not considered official 4-H charters. A 4-H charter is required for any 4-H club to use the 4-H name and emblem.

A 4-H charter represents an agreement by the club with the United States Department of Agriculture on the proper use of the 4-H name and emblem, and the agreement by the club with ISU Extension and Outreach 4-H Youth Development to follow and abide by all state and local 4-H policies, procedures, and other requirements.

Visit www.extension.iastate.edu/4h/regulations-and-guidance for all regulations and guidance for the Iowa 4-H Youth Development Program.

Liability and Risk Management Insurance

ISU Extension and Outreach County Services and the Iowa Extension Council Association work with an approved insurance broker to secure quotes and coverage options with a July 1 effective date. This bundling or packaging of policies provides basic coverage for all counties at an economical group rate.

Always important to this process is to understand what each insurance covers and ways to manage risk. Training videos that explain risk management and the different types of insurance are located on the County Services website under Council, www.extension.iastate.edu/countyservices/council.

All questions regarding coverage and certificates of insurance go directly to the broker. Work with your regional director or county staff.

The table on the following page reflects the type of insurance coverage and explanation about coverage.

| Type of Insurance | Notes |
|-----------------------------------|---|
| General Liability | General liability coverage is provided for operations and activities of the County Agricultural Extension District by a commercial general liability policy through an approved insurance broker. This insurance provides for county office locations and contracted facility use for programs and other county extension activities when negligent acts and/or omissions result in claims of property damage and/or claims of bodily injury. |
| Umbrella Excess Liability #1 | Excess over general liability coverage for County Agricultural Extension District activities including 4-H and Master Gardener activities. |
| Auto Insurance – Personal Vehicle | This is excess liability (over and above what is carried on the personally owned vehicle). This is used when an employee or authorized volunteer is driving his or her personal vehicle for County Agricultural Extension District business-related purposes. This does not cover physical damage coverage to the personal vehicle. |
| Auto Insurance – Rented Vehicle | When an employee is operating a rental vehicle for County Agricultural Extension District business-related purposes. |
| Umbrella Excess Liability #2 | Excess over auto coverage for County Agricultural Extension District employees and authorized volunteers. Excess for Workers Compensation/Employer's Liability for employees only. |
| Employee Dishonesty Bond | County Agricultural Extension Districts have placed a master group policy for employee dishonesty coverage for all council members (excluding treasurers), county employees, and volunteers that are routinely responsible for handling checks and cash. |
| Crime Bond (Treasurer Bond) | Iowa Code requires that each county carry a treasurer bond for their County's Agricultural Extension District treasurer. This is an optional coverage as some counties have other avenues for procuring coverage. |
| Directors and Officers Liability | For County Agricultural Extension District council members. Coverage is for the individuals in their capacity as a council member offering advice on the operation of the organization. The policy provides defense and judgment coverage for claims arising out of their position on the council. In addition, volunteers are also covered while under the direction of the council or county office employees. This extends to cover business judgment, financial direction, and program-related decisions. In addition, this would include liability related to discrimination, harassment, and termination-related claims from current and future employees. The insurance carrier will assist in securing qualified defense counsel in the event of a claim. |
| Professional Liability | Professional liability insurance provides coverage for assistance that an employee (including full-time and part-time employees) and independent contractors providing assistance on County Agricultural Extension District (CAED) behalf or an authorized volunteer acting within the scope of duties to the CAED to provide individuals or companies with education, training, information, advice, consulting, and programming in the areas of career counseling, bookkeeping services, family resource counseling, childcare referral services, family counseling nutrition and food preparation, and horticulture services. The coverage includes costs of defending against a negligence claim made by a client and damages awarded in such a civil lawsuit. This includes negligent performance, damage or loss, or acts of error or omissions while providing advice or services. |

| | |
|---|--|
| Yearly Accident/ Medical | An American Income Life policy provides excess coverage with no deductible and no network restrictions for officially enrolled Iowa 4-H youth members during adult supervised group activities, officially enrolled/approved adult volunteers in any Iowa State University Extension and Outreach program area, and registered youth participants in educational programs organized by any Iowa State University Extension and Outreach program area. This includes youth under the age of 5 who are registered program participants. |
| Terrorism | Coverage for certificate acts of terrorism-defined as an “act that is certified by the Secretary of the Treasury, in Concurrence with the Secretary of the State and the Attorney General of the United States,” to be an act of terrorism pursuant to the federal Terrorism Risk Insurance Act. |
| Unmanned Aircraft (Drones) | Liability coverage has been placed with Global Aerospace for Non-Owned unmanned aircraft systems that do not exceed 55 lbs. in weight. |
| Property Coverage – Building and Office Contents (Optional) | Extension districts may purchase optional property coverage placed by LMC through Cincinnati Insurance at a group rate. The policy provides coverage for buildings owned by the office as well as business personal property (office contents). |
| Special Events Coverage (Optional) | The General Liability coverage contemplates regular/core extension office programming. Special events coverage may be recommended for activities/events that fall outside the scope of contemplated activities. If the event is open to the public, a fee is charged, and/or is not educational in nature, we will want to discuss the possibility of obtaining additional coverage. |
| Worker’s Compensation Insurance | Worker’s comp insurance applies to bodily injury by accident or disease. Injury must be caused or aggravated by the conditions of employment. |
| Cyber Liability | Cyber coverage is provided for operations and activities of the extension district by a cyber policy placed by LMC through Lloyd’s of London insurance company. The cyber policy has a \$2,000,000 limit with \$5,000 retention. This insurance provides coverage for the cost to recover and cost of legal expenses from a data breach, virus, or other cyberattack within certain policy limitations/exclusions. |

ISU Extension and Outreach Civil Rights Plan

The performance of a civil rights evaluation and review is one of the major and unique requirements of federal civil rights legislation. It provides a systematic process for the assessment of compliance with federal regulations as it pertains to policies, procedures, programs, and practices, as well as the development and implementation of modifications and remedial steps taken to correct any instances in which deficiencies are identified.

Download the [ISU Extension and Outreach Civil Rights](http://www.extension.iastate.edu/diversity/civil-rights-compliance-review-process-county-extension-offices) Audit and Review Guide, Checklist for Determining Accessibility to County Extension Offices in Iowa, and the Civil Rights Plan at www.extension.iastate.edu/diversity/civil-rights-compliance-review-process-county-extension-offices.

Justice or Nondiscrimination Statements

Justice statement

The justice statement, or non-discrimination statement, must be included in all departmental publications and county-produced materials offered by ISU Extension and Outreach. This includes but is not limited to brochures, pamphlets, PowerPoints, manuals, and guidebooks describing or inviting participation in programs. The inclusion of the non-discrimination statement is required by federal regulation and is designed to make clear to prospective applicants or participants the university's commitment to equal opportunity employment and equal access to its programs and activities. While the justice statement will be updated on the Diversity and Civil Rights and webpage, there is no requirement to place the statement on departmental or county homepages.

In addition, it is the policy of the USDA to use positive examples of program participation by all protected groups in all forms of visual, print, electronic, and audio public information materials. Check with your county office for full details on how to use these statements. English and Spanish versions are available.

Short Statement

This institution is an equal opportunity provider. For the full non-discrimination statement or accommodation inquiries, go to www.extension.iastate.edu/diversity/ext.

1. Used on documents of 11 or fewer pages.
2. Font size for the short statement must be the same size as the body copy of the document.

Long Statement

In accordance with Federal law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, disability, and reprisal or retaliation for prior civil rights activity. (Not all prohibited bases apply to all programs.) Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, and American Sign Language) should contact the responsible State or local Agency that administers the program or USDA's TARGET Center at 202-720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at 800-877-8339. To file a program discrimination complaint, a complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form, which can be obtained online at <https://www.ocio.usda.gov/document/ad-3027>, from any USDA office, by calling 866-632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by: (1) Mail: U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW

Washington, D.C. 20250-9410; or (2) Fax: 833-256-1665 or 202-690-7442; or (3) Email: program.intake@usda.gov. This institution is an equal opportunity provider.

For the full non-discrimination statement or accommodation inquiries, go to www.extension.iastate.edu/diversity/ext.

1. Used on documents of 12 or more pages.
2. Font size recommendation for accessibility: 7 point.

Employment Opportunities Statement

For use on materials when hiring personnel

Iowa State University is an Equal Opportunity/Affirmative Action employer. All qualified applicants will receive consideration for employment without regard to race, color, age, religion, sex, sexual orientation, gender identity, genetic information, national origin, marital status, disability, or protected veteran status and will not be discriminated against. Inquiries can be directed to the Office of Equal Opportunity, 3410 Beardshear Hall, 515 Morrill Road, Ames, Iowa, 50011, (515) 294-7612, email cooffice@iastate.edu.

Extension Personnel

County Staffing

Staffing for county offices is dependent on identified county/regional needs, available resources, and availability of qualified candidates. Appendix 19, County Paid Staffing Structure, shows the recommended categories of county position descriptions. It is recommended each position be assigned a “category” based on these definitions. It is also recommended that over time the category become part of the working title.

Council Roles/Relationships with Extension Personnel

Extension councils are the employer of county-based employees with guidance from regional and/or county directors. **No one individual council member can determine employment decisions or direct the work of county personnel.** The council as a whole provides guidance to county personnel based on the county’s personnel policy. Procedures may differ from county to county in the details; however, the general components are the same. These include introduction, mission and structure, employment administration, hiring, transfer, interview, performance appraisals and wage increases, disciplinary procedures, termination, benefits, time away from work, days/hours of duty, payroll and expense reimbursement, discrimination and harassment policy, and conduct. Please refer to the local county personnel handbook for specific policies regarding employment. See also Learning Module 12, Payroll and TimeClock Plus.

Volunteers

Extension’s effectiveness is increased tremendously because we are able to rely on volunteers. Thousands of concerned Iowa citizens work hard to bring extension to everyone and serve in a variety of capacities. ISU Extension and Outreach and the extension districts continue to work together to implement the background screenings required by the Memorandum of Understanding. The purpose of a county employee and volunteer background screening process is to create and maintain the best possible environment for all clients and program participants, including vulnerable persons, of ISU Extension and Outreach. This is one step in selecting and placing qualified employees and volunteers in appropriate positions. Screening employees and volunteers also reduces exposure to risk, allowing a reduction in insurance rates. The Iowa Extension Council Association provides forms and guidance for using First Advantage's services. Learn more at www.iaextensioncouncils.org/background-screening.

The cycle of volunteerism is:

- A program or need is identified and a job description developed.
- Recruitment takes place, followed by background screening, selection, and placement.
- Orientation and training are provided.
- Counsel and supervision are given by appropriate “paid” staff.
- Processes are in place for recognition, reappointment, and advancement.
- Periodic evaluations occur with plans for improvement.

Regional Staffing

In July 2020, ISU Extension and Outreach launched a renewed partnership between Iowa State University and councils defined in a Memorandum of Understanding, resulting in three different models of operation for counties. The roles and responsibilities of the regional director and county staff leader differ depending on the model selected. However, the extension council has similar responsibility under all three models. With this renewed partnership, ISU Extension and Outreach was divided into [27 regions](#). For a list of regional directors and a map of regions, which includes regional office locations, visit www.extension.iastate.edu/content/regions, or see Appendix 20.

You can find the Memorandum of Understanding and addendums that describe the role of the regional director on the Iowa Extension Council Association website, www.iaextensioncouncils.org/mou-documents.

Regional Director Roles and Responsibilities

In models 1 and 2, the regional director is an Iowa State University employee and represents the vice president for extension and outreach at the local level. The regional director has hands-on responsibility for assisting the extension council with its duties under Iowa Code 176A and for helping county staff to succeed and grow as professionals. Regional directors will spend time with staff to learn about them, their responsibilities, and their goals so that they can effectively mentor, coach, and supervise staff for future growth. Regional directors will coordinate and regularly attend council and committee meetings and help councils manage their staff, budget, programming, and facilities. Learn more from Appendix 6, Learning Module 17, Staff Supervision.

In model 3, the regional director is an Iowa State University employee and represents the vice president for extension and outreach at the local level. The regional director is responsible for helping the county director to be successful and grow professionally, and for advising the extension council related to federal, state, and Iowa State University rules and regulations. In conjunction with the extension council, the regional director will supervise and oversee professional development for the county director. The regional director will also assist, coach, and serve as a resource for the county director.

Model 1

- The regional director works with councils to provide staff supervision and development, budget and finance implementation, and program planning. The regional director also will lead county staff development and annual reviews.
- In counties that currently have a county director, or an office manager or office coordinator performing a similar role and having similar qualifications, the model 1 county director (CD1) will focus more on local education, engagement, and programming. Individuals in this position also will affiliate more closely with and enhance their knowledge in a program area.
- Day-to-day operations in the county will be similar to current operations and may vary by office, and the regional director will have oversight.

Model 2

- The regional director is an Iowa State University employee and serves one large county or two moderate-sized counties.
- ISU Extension and Outreach will pay 20% per county of salary, benefits, and travel for the regional director. The county or counties pay the remaining 80%.

Model 3

- The model 3 county director (CD3) implements a county plan of work that focuses on stakeholder education and engagement and is responsible for day-to-day office operations and county staff supervision.
- The regional director will supervise the county director in conjunction with the extension council. The regional director also will serve as a resource to the county and a connection to Iowa State University, ensuring that processes align with Iowa State's mission and the Iowa Code.

ISU Extension and Outreach Program Specialists

ISU Extension and Outreach program specialists are academic professional staff located in the field and serving multiple counties. They provide program leadership, interpret and integrate information, teach in the field of designated expertise, and have the competency to respond to questions within their broad subject matter area.

The primary responsibility of extension educators is to work as a team member with other extension educators, extension specialists, and county staff and volunteers to assess needs, determine program priorities, and deliver and evaluate high-quality programs within and beyond their assigned geographic area. Extension educators network with appropriate agencies and groups to determine training needs and explore possibilities for co-sponsoring programs in the counties, region, and state.

ISU Extension and Outreach employs state and field program specialists in the following specialties:

- Agriculture and Natural Resources, <https://www.extension.iastate.edu/ag/anr-staff-directory>.
- Human Sciences, <https://www.extension.iastate.edu/humansciences/> Contacts and Resources.
- Community and Economic Development, <https://www.extension.iastate.edu/communities/people>.
- 4-H Youth Development. <https://www.extension.iastate.edu/4h/>.

Guiding Principles for Housing Program Specialists in a County Office

Program specialists often are housed in a county office. The decision whether to house a specialist is a conversation between the specialist's supervisor and the extension council. Several issues need to be addressed such as space, availability of support staff, and the feelings of existing county staff. See Appendix 14 for guidelines.

ISU Extension and Outreach Staff and Faculty

Administration

Extension administration provides overall direction and support for all of ISU Extension and Outreach — local, regional, and campus. The vice president for extension and outreach also serves as director of Cooperative Extension. The distinction between Iowa and many other states is that the vice president for extension and outreach reports directly to the university president and works with all colleges. An organizational chart depicting all levels of extension is in Appendix 2.

Extension's Connection to Iowa State University Colleges

Several faculty members within the colleges at Iowa State University have appointments to serve extension for a percentage of their time. They may participate in research, program development, and program delivery.

Representing

Iowa State University Extension and Outreach

Extension council members are responsible for communicating about issues related to Iowa State University and ISU Extension and Outreach, including programming opportunities and impacts. Stay informed to provide the best communications.

The most accessible information is online communications. Begin at www.extension.iastate.edu for daily news releases and links to ISU Extension and Outreach news and social media outlets.

Find our social media directory at www.extension.iastate.edu/content/social-media-directory. Follow your county's social media pages and our main page. Subscribe to [blogs](#) and stay current on hot topics.

Branded Promotional Items

Find all things ISU Extension and Outreach on the [Extension Store](#). Many items listed are for the public. Some are free downloadable publications, and some are for purchase. Available promotional items include rain gauges, captain chairs, pens, or mugs. Items such as apparel, business cards, or name badges can be ordered through county offices.

County extension office signage connects the office with the reputation and reliability of Iowa State University. As council members, be sure your office is outfitted with correctly branded signage. Work with your advancement specialist or extension office on costs and how to order from the authorized vendor.

Visual Identity Guidelines

Iowa State University is our first name. The Iowa State University wordmark – a specific design for the written name of an organization – is used to brand the university. It is also used to brand all units, departments, and colleges under its umbrella – that includes ISU Extension and Outreach and sub-units such as county extension offices. The Iowa State University nameplate is made from letterforms (letter shapes) customized especially for Iowa State University. It is a graphic and cannot be duplicated with a standard font – that is why ISU Extension and Outreach's Advancement team creates branded templates for extension offices and program use. Our extension staff receive training to abide by the ISU Extension and Outreach Visual Identity Guidelines, which provide explicit instructions on how to protect our brand. Ask your county extension staff to view a copy of the guidelines or see Appendix 18 for a link to the guidelines.

The ISU Extension and Outreach wordmark should be the only logo represented on our materials. We also do not use the Iowa State University Athletics logo to represent ISU Extension and Outreach. Do not create or add program logos. The only exception is the 4-H clover. National 4-H is an approved partner with the ISU Extension and Outreach wordmark and should be used according to the Visual Identity Guidelines. Contact your extension office for specifics on how to use the ISU Extension and Outreach Visual Identity Guidelines.

Trademark and Licensing

Before creating or ordering any promotional item – including apparel – ask your county extension staff to call their ISU Extension and Outreach advancement specialist to ensure you are following Iowa State University Trademark and Licensing policies. Your designated advancement specialist can assist in the process. All signage, product production, and branding are conducted under these Licensing Program Guidelines for the Use of Iowa State University's Marks:

“Federal Trademark laws require the University to control its Marks or risk losing exclusive rights to its

Marks. The Trademark Licensing Office (Trademark Licensing) and its contracted agency contractor, The Licensing Resource Group (LRG), provides this needed control by granting individuals, organizations, and businesses the rights to use the Marks under a license agreement. As provided in the Policy, these Guidelines are established and governed by Trademark Licensing. The term University includes the University, its affiliated organizations, and organizations formally registered with the University. All non-University users of the Marks must be licensed except when the use:

- *is by the news media for news reporting;*
- *is by an artist in an original work of art which will not be reproduced; or*
- *is a congratulatory or supportive advertising message using the University's names but not its logos and symbols. For example, "Go Cyclones" or "Welcome Back ISU Students" are supportive types of messages.*

Suppliers of products to the University bearing any Mark must be licensed except when Marks are used in the following products manner:

- *printed publications and advertising for purposes of institutional and event promotion; and*
- *printed supplies, not for resale.*

Products created by a University unit and bearing the Marks must be produced by a licensed vendor, except for educational and scholarly materials owned by the University and printed publications and advertising for purposes of institutional and event promotion.

All licensing is managed by Trademark Licensing and administered by its agency contractor, LRG."

Crisis Communication

When a crisis occurs in counties in relation to extension business, the council should be ready and regularly review a crisis communications plan with the regional director. ISU Extension and Outreach has developed a Crisis Communication Plan that includes definitions of a crisis, action steps, how to define a crisis management team, and appropriate follow up to the situation.

It is important for all council members and county staff to be prepared and review the following statement as a response to all inquiries from the public, media, staff, etc., while waiting to process your response and action steps: "We are currently gathering the details about the situation and will share information as it becomes available."

Learn more from Appendix 6, Learning Module 6, Crisis Communications.