

**2015-2016**  
**Central State University Extension & Ohio State University Extension**  
**OPERATING PRINCIPLES**

**For**  
**Co-locating County Extension Professionals in Ohio**

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**PURPOSE**

This document establishes the operating principles in support of the implementation of the Memorandum of Understanding (MOU) between The Ohio State University and Central State University on Extension work dated August 13, 2015. The agreement intends to provide detail and foster cooperation in the prioritization, development, and delivery of cooperative agreements to meet the needs of Ohio's residents.

**IDENTIFICATION OF COUNTIES FOR CO-LOCATION**

In furtherance of the August 2015 MOU and the goals outlined therein, Central State University and The Ohio State University have determined that their collaboration will be focused on the following counties in which CSU Extension and OSU Extension will be co-located: Cuyahoga County, Franklin County, Lucas County, Butler/Hamilton County, Montgomery County, and Greene County.

In collaboration with OSU Extension administration, CSU Extension administration will identify additional counties in which it desires to implement Extension programming in conjunction with existing OSU Extension programs. Where a county is agreed upon by appropriate institutional administration identified by each institution pursuant to its institutional policies, initially, CSU Extension Associate Director and OSU Extension County Extension Director will work together to develop a programming plan for the areas identified in the MOU to ensure that the proposed programming is not a duplication of existing services to an existing community within the county. Programming plans will be submitted to CSU Extension administration and OSU Extension administration for final approval before implementation.

**CO-LOCATED COUNTY PROGRAM COORDINATION**

**I. State-level Program Coordination**

Program coordination between Central State University (CSU) Extension and Ohio State University (OSU) Extension will begin with identification and alignment of programmatic goals at the state level. To assist with this process, OSU Extension Assistant Directors and the CSU Extension Associate Director will identify areas of Extension content and research expertise for their respective institutions.

Specific areas program leadership and coordination efforts for CSU and OSU are identified in the MOU and target program development and expansion in the areas of Agriculture and Natural Resources, 4-H and Youth Development, Family and Consumer Sciences, Community and Economic Development, and Diversity. Within these agreed upon areas of program leadership, each institution will do the following:

1. Identify key contacts (e.g., faculty, staff, and educators) with expertise in the identified Extension program areas and share the key contacts with the partner institution.
2. Accept referrals and provide information and technical assistance where feasible to field faculty and educators, campus faculty, and clientele.
3. Make available subject matter orientation, in-service education and training for faculty and staff that has been developed by the institution.
4. Whenever possible or appropriate, engage faculty and staff from partner institutions in advisory bodies and planning groups.

## **II. State-Wide Steering Committee**

In furtherance of the MOU, CSU Extension and OSU Extension will create a state-wide steering committee to provide oversight for administrative (e.g., financial and personnel) and programmatic matters in the identified Extension program areas of focus in co-located counties. The steering committee shall be comprised of OSU Extension and CSU Extension representatives. After CSU hires county staff, the steering committee will consist of representatives from the county leadership operations and convene meetings on a quarterly basis, or more often as needed.

## **III. Annual Strategic Plan**

County educators in co-located offices will participate in an annual strategic planning session addressing programming and funding led by the OSU Extension County Extension Director and CSU County Agent to coordinate major issues and outline joint programming for the year. Among the goals of the planning session will be to ensure the achievement of National Institute of Food and Agriculture's overarching goals through relevant programs and evaluations, as well as the programmatic goals outlined in the August 2015 Memorandum of Understanding between CSU Extension and OSU Extension.

The OSU Extension County Extension Director and CSU County Agent will coordinate and participate in the strategic planning session for each co-located county office. The strategic planning session shall include discussion of program needs identified or requested by CSU Extension, OSU Extension, and members of the community in co-located counties where program assistance or support is needed for program implementation. OSU Extension Regional Directors and CSU Extension's Program Manager will be asked to submit observations and suggestions for local programs that educators could implement. OSU Extension and CSU Extension will collaborate together to build and foster dynamic learning environments, and provide outreach programs that enrich area residents where they live, work and play.

All county educators will submit draft individual program and funding plans of work to the OSU Extension County Extension Director and County Agent and OSU Regional Directors and the CSU Extension Program Manager to provide feedback on each program plan of work and sign the final plans of work to indicate approval. The individual annual plans will be integrated within an overall county strategic plan to ensure coordinated county efforts throughout the year. If no agreement is reached regarding the annual strategic plans for a co-located office, the plan will be provided to the Steering Committee for review and a final determination regarding implementation.

#### **IV. Joint Program Collaboration**

To ensure the visibility and recognize the contributions of both institutions in implementing county-wide activities that involve both CSU Extension and OSU Extension, the following protocol should be followed at the county and regional levels.

##### **a. County Program Collaboration**

1. Program materials for programs that have been jointly developed by CSU Extension and OSU Extension shall display both institutions names and/or approved logos. For programs developed by one institution, proper attribution (e.g., names and/or logo of the authoring institution) shall be indicated by the other institution on program materials.
2. County signage shall be coordinated by CSU Extension and OSU Extension and include names and/or logos of both institutions in counties where co-location has been approved by CSU Extension and OSU Extension. The cost affiliated with any signage shall be addressed in the separate county services agreement.
3. All county materials (e.g., County Highlights, county web pages, etc.) shall include appropriate titles, affiliations, and proper attribution.
4. Staff persons with responsibilities to implement a joint program or project should be kept fully informed about the current status of the program.
5. Recognition will be given to both organizations when grant proposals are implemented jointly. OSU Extension and CSU Extension staff should coordinate grant writing efforts when working with the same funding sources and use joint letterhead, where appropriate and approved by the CSU County Agent and OSU Extension County Extension Director.
6. County staff should be responsive and cooperative, as time and resources allow, when assistance is requested to conduct trainings, meetings, and other activities such as applied research, engagement, or development activities.
7. OSU Extension and CSU Extension staff should coordinate programming when working with the same, specific audience/clientele.
8. OSU Extension and CSU Extension staff should coordinate opportunities for collaboration to achieve and sustain diverse programming in and across the

communities in which they serve.

**b. Regional Programs**

1. OSU Extension educators and CSU Extension Agents should participate in regional events and activities, when appropriate.
2. Educators are responsible for notifying CSU Extension and OSU Extension administrators (i.e., County Extension Directors, County Agent, Regional Directors, and Assistant Directors) of scheduled events and extending invitations when appropriate.
3. County educators are responsible for notifying CSU Extension and OSU Extension supervisors of potential scheduling conflicts for regional joint programming, meetings, training, or other obligation.
4. Both CSU Extension and OSU Extension (the OSU-CFAES logo) logos should be used on regional programming materials where both institutions are involved in program delivery.

**V. Requests for County & Regional Programming**

Individual clients, local businesses or other organizations, or other partners of Extension may make formal or informal requests for County educators or County agents to conduct educational programs and activities. These formal or informal requests may include increased programming in Ohio cities

Questions regarding the joint programming or programming requests should be shared during regular updates with the County Extension Director and County Agent, who will solicit input from the OSU Extension Regional Director and the CSU Extension Program Manager. A final response shall not be provided to a requestor or action taken upon the request prior to receiving input from the OSU Extension Regional Director and the CSU Extension Program Manager.

For programs that are not jointly planned, CSU Extension and OSU Extension educators may request educators or specialists from the other institution to assist with program delivery or to provide special planning assistance. A final determination regarding programming shall be made based upon available resources, requested staffing, and shall be approved by the OSU Extension Regional Director for OSU Extension or the CSU Program Manager for CSU Extension.

**VI. County Extension Leadership Advisory Board and Program Committees**

OSU Extension Educators and CSU Extension Agents will be expected to attend and provide support for county advisory committee meetings. In cases where the county advisory committee is newly established in co-located counties, CSU Extension will review membership and concur or suggest the inclusion of at least 3 additional members to be appointed by CSU Associate Director of Extension. In cases where the county advisory committee is established, CSU Extension will appoint at least 4 additional members, depending on the size.

In the event of advisory board vacancies, OSU Extension and CSU Extension will both be provided with the opportunity to recommend new members for nomination to the board. The OSU Extension County Extension Director and CSU County Extension Agent will jointly review the names submitted by the offices to fill vacancies and make the final membership decision in consultation with the Regional Director and Program Manager for the co-located office.

## **CO-LOCATED COUNTY OFFICE STAFFING**

### **I. Staffing Generally**

As outlined in the MOU, CSU Extension agents will be employees of CSU and OSU Extension educators will be employees of OSU. Nothing within these operating principles or the MOU should be construed to create a joint county employment relationship between CSU Extension agents and OSU Extension educators.

### **II. Staffing Vacancies**

As vacancies occur at co-located offices, CSU Extension administration and OSU Extension administration (i.e., Assistant Directors, Regional Directors, CSU County Agent, Program Manager, and the County Extension Director, as appropriate) will review staffing patterns based on current priorities, program objectives, and available resources to determine whether to fill vacancies and which program areas will receive priority for filling positions.

### **III. Staff Relationships**

The OSU Extension-funded County Extension Director will be responsible for the general operation of the county office and the County Extension Director will oversee and handle the hiring, supervision, and evaluation of the OSU-employed county staff. The CSU County Agent will be responsible for CSU Program development and will oversee and handle the hiring, supervision, evaluation of programs, and partnership agreements.

To assist with involvement at the county-level, CSU Extension County agents and OSU Extension county educators are expected to participate in regular county office conferences, meetings, and other activities that relate to the general operation of the county office. Pursuant to current county practice, the appropriate Regional Director, CSU Program Manager, County Extension Director, County Agent, or another designated OSU Extension staff member, will coordinate conversations between OSU Extension or CSU Extension and administrators to the county governance, other official county unit, and primary funders or community stakeholders (e.g., foundations, corporate sponsors) as appropriate.

### **IV. Staff Employment Process**

Hiring of staff members for OSU Extension and CSU Extension positions will occur pursuant to the individual institutions hiring practices and policies as outlined in the August 13, 2015, MOU.

For OSU Extension-funded county educator positions, the OSU Extension Regional Director and Assistant Director will develop position announcements per OSU Extension guidelines and OSU Human Resources guidelines. The Regional Director and Assistant Director also are responsible for developing position descriptions for county-funded program coordinators, program assistants, and other OSU Extension personnel.

The CSU Extension Program Manager will develop CSU Extension position announcements per CSU Human Resources guidelines. The CSU Program Manager is also responsible for developing position descriptions for county-funded program coordinators, program assistants, and other CSU Extension personnel.

These position announcements should address local issues and correlate with existing OSU Extension and CSU Extension programming, but not duplicate efforts already in place in the same location. If needed, the CSU Extension Program Manager and OSU Extension Regional Director will determine if additional program support is needed for programs already being provided in the county.

In co-located counties, the OSU Extension Regional Director and CSU Extension Program Manager will notify the other about the planned posting of an educator position before the posting of the position. If known, the OSU Extension Regional Director and CSU Extension Program Manager will also share details about the educator search process, including, but not limited to, advertising venues, length of posting, and expected interview dates (state screening interviews and county-level interviews).

#### **V. On-Boarding of Employees**

The CSU Extension Program Manager and OSU Extension Regional Directors will develop an on boarding process for new county employee orientation for employees in co-located counties to supplement any institution-specific programs required for employment at either OSU or CSU.

#### **VI. Supervisory Roles**

The CSU Associate Director of Extension will initially provide direct supervision of CSU Extension Agents in counties where OSU Extension and CSU Extension are co-located. The OSU Extension Regional Director will provide direct supervision of OSU Extension educators in counties where OSU Extension and CSU Extension are co-located. The OSU Extension Regional Director will provide supervision of each County Extension Director and general guidance for personnel issues within each county office.

OSU Extension Assistant Directors will provide general programmatic supervision, leadership, and coordination of efforts among the identified OSU Extension program areas – 4-H youth development, agriculture and natural resources, community development, and family and consumer sciences.

The CSU Associate Director of Extension will provide general programmatic supervision of CSU Extension county agents in counties where OSU Extension and CSU Extension are co-located and provide leadership and coordination of efforts among the identified CSU Extension program areas – Agriculture

and Natural Resources, 4-H and Youth Development, Family and Consumer Sciences, and Community and Economic Development.

In counties where OSU Extension and CSU Extension are co-located, a mentor will be assigned for all new Extension educators. The OSU Extension Regional Director will assign a mentor for OSU Extension educators and the CSU Associate Director of Extension will assign a mentor for CSU Extension agents, if there is an appropriate mentor available. If not, the CSU Associate Director of Extension may approach the OSU Extension Regional Director regarding a potential OSU Extension mentor, if appropriate. It is suggested that the mentor/mentee relationship continue for at least 12 months.

Regular communication about program implementation and evaluation shall occur among the co-located educators with input from the County Extension Director and County Agent. As needed, the appropriate OSU Extension Assistant Director and Regional Director and the Program Manager may be consulted for input and recommendations regarding program implementation and evaluation.

**VII. Performance Review Process**

County educator performance reviews and salary adjustments are the purview of the supervisor of the county educators employing institution. As part of the review process, feedback may be solicited from the other institution's program leader for consideration.

**VIII. Absence Notification Process**

The educator's county office, County Agent, County Extension Director, and supervisor shall be notified when a co-located employee requires sick or emergency leave from their job duties.

## **CO-LOCATED COUNTY OFFICE OPERATIONS**

**I. Office Services**

While CSU Extension and OSU Extension will operate independently in alignment with their institutional requirements for the maintenance of funds, personnel, and operations, in co-located counties, CSU Extension and OSU Extension will enter into a separate service agreement that outlines the cost sharing of shared services, including, but not limited to, telephones, computer support, administrative services, office supplies, and copying services. This service agreement will be executed prior to the co-location of any CSU Extension and OSU Extension staff.

**II. Monthly Reports**

County educators and county agents must submit monthly reports as defined by the supervising OSU Extension Regional Director and CSU Program Manager of their co-located office to their respective institution. For OSU Extension County educators, the report shall be submitted to their supervising OSU

Extension Regional Director and for CSU Extension agents and staff the report shall be submitted to the CSU Program Manager.

Within a reasonable period, all educators are expected to respond to requests from CSU Extension and OSU Extension administration, Extension partners, and other stakeholders for additional programmatic information upon request.

### **III. Trainings and Conferences for County Staff**

OSU Extension educators will attend OSU Extension state, regional or other trainings, as deemed appropriate by the OSU Extension Regional Director and County Extension Director, with consideration given to the institution's travel budget. CSU Extension educators will attend 1890 and 1862 national, regional, OSU, and other appropriate trainings, as deemed appropriate by the CSU Associate Director of Extension, with consideration given to the travel budget.

OSU Extension and CSU Extension county educators in co-located counties will be invited and are encouraged to attend trainings offered to the staff of the other institution.

### **IV. Office Identification and Signage**

In counties with both OSU Extension and CSU Extension programs, office signage shall prominently display the names and logos of both organizations.

### **VII. Coordination of Services**

- a. CSU Extension program leaders will participate in OSU Extension program leader (i.e., Associate Director, Program Manager, etc.) meetings as appropriate, and OSU Extension program leaders will participate in CSU Extension program leader meetings as appropriate (Director, Assistant Director, etc.).
- b. Senior administrative staff and County Extension Directors from OSU Extension and CSU County Agent and senior administrative Extension staff will meet quarterly to discuss strategies for developing and enhancing program coordination.
- c. The state extension advisory committee will include representation from both OSU Extension and CSU Extension about issues that have implications for both programs.
- d. CSU Extension and OSU Extension administrators and educators will be invited to participate in annual conferences and program area meetings sponsored by the other institution. Costs associated with attendance at these conferences and meetings shall be paid by the respective employing institutions of the administrators and educators.

## **OHIO 4-H PROGRAM OPERATIONS IN CO-LOCATED COUNTIES**

### **I. Ohio 4-H Program**

The Ohio 4-H Program is a youth development program founded to make a positive difference in the life of its youth participants. The Ohio 4-H Program is a part of the larger Extension organization and the coordination of the Ohio 4-H Program to maintain one state program is central to the continued success of the Ohio 4-H Program.

Acknowledging that the 4-H Program was founded in 1902 in Clark County, Ohio, and is guided by the Four H's—Head, Heart, Hands, and Health—OSU Extension and CSU Extension agree that the following motto, mission, vision and values shall govern all programming and activities of the Ohio 4-H Program.

- a. Ohio 4-H Motto
  - 1. To Make the Best Better
- b. Ohio 4-H Mission
  - 1. 4-H Youth Development education creates positive environments for diverse youth and adults to reach their fullest potential as capable, competent, caring, and contributing citizens.
- c. Ohio 4-H Vision
  - 1. Ohio 4-H is the state's premier leader in developing youth to become positive productive citizens and catalysts for effective change to improve our diverse society.
- d. Ohio 4-H Values
  - 1. Positive youth development is the focus of everything we do.
  - 2. Partnerships with other organizations, schools, and businesses are essential to successful youth development.
  - 3. Volunteerism is fundamental to our work.
  - 4. Strength is attained through diversity across the entire range of 4-H experiences.

### **II. Oversight of the Ohio 4-H Program**

CSU Extension and OSU Extension understand the 4-H Youth Development Program is defined as the education and outreach component of the Cooperative Extension Services at land-grant institutions, and the US Department of Agriculture (USDA). 4-H youth development programs are created and implemented by Cooperative Extension Services as a means for the land-grant institutions to carry out responsibilities under the Smith-Lever Act, 7 US Code (USC) 341. National oversight for the Ohio 4-H Program is provided by the 4-H National Headquarters in the Division of Youth and 4-H, housed at USDA's National Institute of Food and Agriculture (NIFA).

CSU Extension and OSU Extension will work together to implement programming and activities for the Ohio 4-H Program that align with the mission, vision, and goals of National 4-H Headquarters, the Extension Committee on Organization and Policy (ECOP), the National 4-H Program Leaders, the North Central Region 4-H Program Leaders, and, where applicable, partnerships with the National 4-H Council. Each institution also understands that they will each be responsible for compliance with directives or fulfilling other requirements of the USDA NIFA Division of Youth and 4-H National 4-H Headquarters related to the Ohio 4-H Program, including, but not limited to the annual ES237 report which will be jointly submitted by OSU Extension and CSU Extension.

### **Volunteers & Club Development**

Volunteers are essential to the function of the Ohio 4-H Program and the Ohio 4-H Program has developed requirements and processes to ensure the educational development of volunteers, while continuing to provide safe learning opportunities for the Ohio 4-H youth members. These requirements and processes include, but are not limited to, the volunteer application and interview process, execution of volunteer agreements, and annual and ongoing volunteer training. OSU Extension also requires that Ohio 4-H Program volunteers complete a criminal background check prior to their service as a volunteer and submit a new background check every four years thereafter.

The Ohio 4-H Program also has developed guidelines for the establishment and chartering of new Ohio 4-H Clubs. These requirements include, but are not limited to, adoption of a constitution, obtaining an EIN, electing club officers and developing membership guidelines, an annual program plan, and financial reporting processes. The Ohio 4-H Club requirements shall align with the requirements of the National 4-H Headquarters.

CSU Extension and OSU Extension acknowledge the importance of having consistent requirements for volunteers and the establishment of new clubs, as well as all other 4-H special interest groups, and will work together to agree upon and adopt a single set of requirements and processes. OSU Extension 4-H State Staff and CSU Associate Director and 4-H Staff will work together to develop and adopt these requirements and processes. During the review process, existing requirements and processes will inform the adoption of a single set of requirements. Final approval must be obtained from the OSU Extension 4-H Youth Development Assistant Director and agreement from the CSU Extension Associate Director before implementation.

### **III. Ohio 4-H Programming**

CSU Extension and OSU Extension will work together to develop an Ohio 4-H Program plan for co-located county offices to ensure that the proposed 4-H programming is not a duplication of existing 4-H programming within the county. CSU Extension and OSU Extension agree to jointly fund and use the 4HOnline web-based database program, which is used to complete numerous reports, including the ES-237, verify volunteer status, and to track membership, enrollment and other important 4-H project and participation criteria.

#### IV. Youth Membership Criteria

CSU Extension and OSU Extension agree to use the following youth membership program criteria for all Ohio 4-H Program clubs.

<b>PROGRAM CRITERIA</b>	<b>CLOVERBUDS</b>	<b>PROJECT MEMBERS</b>
<b>What is the age eligibility?</b> (Age determined as of January 1st of the current year.)	Age 5 <b>AND</b> in Kindergarten through 2nd grade	Age 8 <b>AND</b> in 3rd grade through age 18. Ohio 4-H membership ends December 31 <sup>st</sup> of the year that the 4-H member turns 19.
<b>What is the learning focus?</b>	Activity-centered, short 5 to 15 minute activities on varied topics	Project-centered; time commitment dependent on project selected; club activities challenge and support member project-learning
<b>Who directs the learning process?</b>	Leader-directed	Member self-study, member- and leader-directed
<b>What is the basis for the learning experiences?</b>	Activity manual taught by leaders	Project manual used by members, supplemental resource handbooks, and teaching aids
<b>What animal experiences are possible?</b>	Small animals in a group setting handled by a leader, no large animal experiences allowed	Small and large animals as selected by the member and parent/guardian
<b>What are the evaluation criteria?</b>	Non-competitive, equal recognition, participation	Competitive, achievement, participation
<b>What camping experiences are available?</b>	Day camp and one-night overnight camping experiences with Cloverbud-age members only.	Day camp and multi-night resident camping experiences, county, regional, and state opportunities.

#### V. Camp Annual Requirements & Best Practices

Camp is a central program offering of the Ohio 4-H Program and is governed by requirements and best practices developed by the Ohio 4-H Program and, informed by those of the American Camp Association. OSU Extension and CSU Extension agree to review these regulations and best practices, as well as develop a procedure for coordinating usage of existing Ohio 4-H camps for programming and activities.

#### VI. Shooting Sports

CSU Extension and OSU Extension agree to follow the National 4-H Shooting Sports (SS) guidelines and policies. Specifically, all 4-H SS instructors will be trained by approved state instructors certified to teach courses, authorized by the OSU Extension State 4-H Office. Adult volunteers will receive training in 4-H SS at state and regional workshops to become and to maintain status as qualified instructors.

## **VII. Risk Management**

CSU Extension and OSU Extension agree to review the Ohio 4-H Program Risk Management guidelines, policies, and appropriate forms to use to manage and mitigate risk in 4-H programs and activities.

## **VIII. Protecting Minors**

The safety and protection of minors involved in the Ohio 4-H Program is of the utmost importance and CSU Extension and OSU Extension shall ensure that existing policies governing the interactions of volunteers, employees, staff, faculty, students, and other with minors applies to the Ohio 4-H Program. This includes adherence to the list of automatically disqualifying past criminal convictions when screening potential volunteer applicants.

## **IX. Usage of the 4-H Name and Emblem**

The United States Congress has legislated responsibility for the proper management of the 4-H Name and Emblem to the Secretary of Agriculture. The Secretary of Agriculture has delegated that authority to 4-H National Headquarters in the Division of Youth and 4-H, housed at USDA's National Institute of Food and Agriculture (NIFA). The use of the 4-H Name and Emblem is defined through 7 Code of Federal Regulations (CFR) 8. County 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.

As a recognized 4-H Program, the Ohio 4-H Program has permission to use the 4-H name and emblem and has developed internal guidelines for the usage of these marks at the county level. CSU Extension and OSU Extension agree that as Cooperative Extension Services, it is our responsibility to protect and promote use of the 4-H Name and Emblem in order to reflect the educational goals and achievements of 4-H. CSU Extension and OSU Extension will follow and communicate the guidelines outlined by National 4-H Headquarters, and the state requirements for the usage of the 4-H name and emblem, including any use associated with fundraising activities. CSU Extension and OSU Extension agree that any requests for use of the 4-H Name and Emblem in co-located counties will be discussed and mutually agreed upon by all educators in the co-located county with 4-H programming responsibilities before granting approval.

## **X. Other**

Fundraising performed on behalf of the Ohio 4-H program will be jointly reviewed.

Programmatic or operational matters in co-located counties not addressed in these Operating Procedures related to the Ohio 4-H Program shall be discussed with the OSU Extension Regional Director, CSU Program Manager, 4-H Coordinator, and the State 4-H Leader, as needed.

We the undersigned have reviewed the Operating Principles currently in force and they will remain effective through the FY17 fiscal year.

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Dr. Clarence Bunch                      Date  
Associate Director of Extension  
Central State University Extension

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Dr. Roger Rennekamp                      Date  
Associate Dean and Director  
Ohio State University Extension