

MSU EXTENSION MONTANA 4-H PROGRAM POLICIES AND PROCEDURES

This handbook expresses the policies for the administration of the Montana 4-H program. These policies and procedures are here to help County Extension agents and support staff to comply with MSU Extension policies and procedures. Additional policies and procedures may be developed and implemented by individual counties or reservation Extension agents in accordance with Montana 4-H policies and procedures. A county may have policies more restrictive than the state policies, but not less restrictive.

The following policies are in effect for all persons associated with the Montana State University Extension 4-H program. The purpose of this policy statement is to ensure that the Montana 4-H program is inclusive rather than exclusive. These policies are available in alternate format upon request, or can be found on the Montana 4-H website at: <http://www.montana4h.org>

AFFIRMATIVE ACTION POLICY

Montana State University and its constituent colleges and programs, including the Montana State University Extension 4-H program, do not discriminate on the basis of race, color, national origin, sex, sexual preference, marital or parental status, age, religion, creed or political belief, mental or physical handicap or disability, or status as a Vietnam era or disabled veteran in admission, access to, or conduct of its educational programs and activities nor in its employment policies and practices. Discrimination in the 4-H program is contrary to the purposes and policies of MSU Extension, Montana State University, the State of Montana, and the United States Department of Agriculture and is prohibited.

Participation in Montana 4-H and its programs is open to all interested youth regardless of race, color, national origin, sex, sexual preference, religion, creed, political belief, marital or parental status, or disability. Participation in some programs or aspects of 4-H may be subject to certain age requirements, specific enrollment deadlines, or specified ownership deadlines. These age requirements are detailed in the section titled “Membership” (found on page 5).

A participant, applicant for participation, professional or volunteer staff member, or any person needing accommodation because of a disability should request accommodation from the County Extension Agent.

Montana State University affords any participant, applicant for participation, or professional or volunteer staff member who believes he or she was discriminated against by Extension 4-H/Youth program has the right to file a grievance on grounds of discrimination. Complainants of discrimination, including harassment on the basis of race, color, national origin, sex, sexual preference, marital or parental status, age, religion, or disability should be reported to the Human Resources/Affirmative Action Office, Montana State University-Bozeman, Box 172430, Bozeman, MT 59717-2430. TDD (text telephone): 406/994-4191. Phone: 406/994-2042.

4-H PROGRAM AUTHORITY AND GOVERNANCE

4-H is the youth education program of the Montana State University Extension, cooperating with the U.S. Department of Agriculture and local county governments. **The MSU County Extension Agent has the ultimate responsibility for and leadership of the 4-H program.** 4-H program policy authority is held by Extension personnel whether at the county or state level, and is administered by the Director of the Montana State University Extension. The County Extension agent has the final authority in matters of conduct, discipline, health and safety in connection with 4-H members and leaders attending 4-H events and activities in the county, in the state, or outside the state.

The role of the salaried Extension 4-H staff is to educate youth and adults, and to develop and manage a system through which Extension and non-Extension volunteers provide educational programs that enhance subject matter knowledge and life skills development in youth. Extension personnel serve as educators, change agents, leaders and program managers, including ensuring fiscal responsibility of 4-H programs.

4-H Name & Emblem

4-H programs were initially authorized by the U.S Congress, and the 4-H name and emblem are protected under federal statute Title 18, U.S. Code 707. This statute protects other federal emblems, like the Seal of the President of the United States. Continued authorization is contingent upon compliance with county, state and national policy. Authorization includes the use of the 4-H name and emblem (see this website for specific details: <http://www.national4-hheadquarters.gov>). Permission to start any 4-H program must be obtained from County Extension personnel responsible for 4-H in that county.

There must be some form of written agreement between the individual, organization or group to whom authorization for use of the 4-H name and emblem has been granted, and the designated persons responsible for granting authorization at the appropriate level—county or state. The written agreement can be in the form of the 4-H club charter, letter, or other documents devised by responsible units of the MSU Extension at the state or county levels.

MSU Extension Agent Authority

Leadership for the 4-H program is provided at the national, state, and county levels by MSU County Extension Agents, working cooperatively with parents and volunteer leaders. 4-H advisory committees, 4-H councils, leader associations and other

organizations serve in an advisory capacity and give advice to the direction of 4-H program efforts. The authority to establish and administer such groups is held by Montana State University Extension personnel at the county and state level.

4-H has a unique link with an extensive knowledge and research base through its cooperative partnership with all land-grant universities, county governments, and the U.S. Department of Agriculture. 4-H is unique in comparison to other youth programs in that there are university-trained professionals who provided administrative leadership for the program in each county. These intelligent, creative and talented individuals ensure that 4-H programs are based on "best practices" and current research.

MISSION AND PURPOSE

The mission of Montana 4-H is to educate youth and adults for living in a global and ever changing world by using the resources of Land-Grant Universities and the U.S. Department of Agriculture.

Montana 4-H uses educational, learning-by-doing projects, club meetings, community service projects, events, and activities for young people and adults as they work toward attaining these five LIFE SKILLS:

- Fostering positive self-concept
- Learning decision-making and responsibility for choices
- Developing an inquiring mind
- Relating to self and others
- Acquiring a concern for communities--local and global.

The emblem of the 4-H program is a green four-leaf clover with a white "H" in each leaf. The four "H's" stand for Head, Heart, Hands, and Health and represent the ways 4-H develops the five life skills.

HEAD: Learning to think, make decisions, understand the "whys," gain new and valuable insights and knowledge.

HEART: Being concerned with the welfare of others, accepting the responsibilities of citizenship in our local and global communities, determining values and attitudes by which to live, and learning how to work with others.

HANDS: Learning new skills, improving skills already developed, instilling pride in work, and respect for work accomplished.

HEALTH: Practicing healthful living, protecting the well-being of self and others, making constructive use of leisure time.

This four-fold development is vital to every individual. All four of the "H's" should be an important part of the goals youngsters identify as they participate in 4-H sponsored programs and educational activities. Achieving these goals will result in helping youth develop as competent, caring, confident, connected, compassionate contributors of high ethical character.

4-H VALUES

4-H is grounded in the following values:

Democratic Participation—youth are recognized as contributing members in their communities and in organizations like 4-H. Democracy is a social condition that leads to equity, respect and tolerance for the individual and his/her views. 4-H encourages youth to join or share with others while promoting equity, respect and tolerance.

Informal Education—learning occurs in many different settings. Informal education occurs in casual conversations, hands-on projects, and a myriad of other settings that help youth gain the knowledge, skills and competence for living their lives. Meeting youth in their own settings is critical to 4-H youth development.

Relationship Building—4-H youth work is about building positive relationships of trust, confidence, respect, equity and feelings of well-being. Relationship building is a cornerstone to youth work. It's not so much about the activities or the content of the activities as much as it is about the connections made between people.

Empowerment—4-H youth development is about empowering individuals to have control over the decisions that influence their lives and well-being. A goal of 4-H youth development is to give youth a voice, to give them the opportunity to have influence in the affairs related to their lives. Empowering youth often involves assisting them in developing a sense of ownership as well as giving credence to their ideas, values, opinions and interests.

Learning and Engagement—Activities are not seen as ends in themselves, but as vehicles for building skills and competencies (learning) and solidifying relationships and commitments (engagement). The creation of safe, non-threatening, nurturing environments is essential to learning and engagement.

Participation and Choice—In 4-H, youth need opportunities to be active participants in the design, management, implementation, and assessment of the activities, structure, institutions, and environments that affect their lives. Youth need opportunities to choose how, when, in what and with whom to be engaged. 4-H youth development is grounded in voluntary participation.

GUIDING PRINCIPLES OF MONTANA 4-H

- 4-H is a positive youth development program that teaches leadership, citizenship and other life skills.
- 4-H uses a variety of delivery methods such as clubs, special interest groups, activities and events, newsletters, satellite programs, camps, enrichment programs

or individual participation to actively engage young people in positive youth development settings. All delivery methods are legitimate forms of 4-H participation.

- By completing an enrollment card by the county deadline and having it on file in the county office, a youth enrolling in any 4-H program is considered a 4-H member and is eligible to take part in other 4-H programs providing they meet eligibility requirements and are bona fide members in good standing.
- 4-H relies on local determination of programs to fit specific needs of youth to be involved. 4-H is flexible enough to accommodate many different local needs and interests, but also must conform to certain state and national policies and procedures. There are many things that local people can decide about their 4-H program, but ultimately, Montana State University Extension personnel are responsible for the leadership and conduct of the program. Affirmative action requirements and state and national award and recognition programs are two areas where local determination must give way to other requirements.
- 4-H is a family-centered program. 4-H emphasizes involvement of parents/guardians and their children in making decisions, planning events, and evaluating the success of programs. However, 4-H does not exclude children whose parents or guardians cannot be involved.
- The 4-H program is carried out by salaried Extension professionals and staff, volunteers, teen leaders, and members. Extension agents are ultimately responsible for giving leadership to the 4-H program at the county level and must ensure that 4-H activities, events and programs follow state guidelines and requirements. Clubs and leaders that refuse to follow state and/or county policies will be prohibited from operating under the 4-H name and emblem.
- 4-H is a program that recognizes and values youth as resources. Young people must be active participants in decision-making, governance and leadership roles, especially in programs designed for their benefit.
- 4-H must continually strive to provide programs that appeal to diverse and under-served audiences. The goal of 4-H is to be inclusive, not exclusive, and youth can participate at a rate of learning or level that is appropriate to their needs and interests.

MEMBERSHIP

1. Youth who turn 6 years of age during the 4-H program year (October 1-September 30) may join 4-H as a Cloverbud and enroll only in the Cloverbud project. Cloverbuds is the only project in which youth ages 6-8 are to be enrolled. The 4-H Cloverbud curriculum is specially designed to meet the developmental stage and interests of these youth. Cloverbuds do not participate in competitive activities and are not to be judged

against others. Cloverbuds can exhibit at fairs, but no live animals are allowed. Cloverbuds can exhibit in a special “Cloverbuds” division at the fair, but these exhibits should not be competitively evaluated. Cloverbuds are not to attend overnight camps unless accompanied by an parent/guardian. Cloverbuds do not participate in fund-raising activities. While counties do not have to offer a Cloverbud program, if they do, these programs MUST conform to state guidelines. The emphasis in Cloverbuds is on fun and learning. For additional policies and guidelines, please refer to 4-H Cloverbuds: Agent and Volunteer Leader Guide (#5274) available from Extension Publications.

2. Youth who turn 9 during the 4-H year may join 4-H as a 4-H member and enroll in any project(s) listed in the 4-H Clover. If youth turn 19 years of age prior to the beginning of the program year, they are **ineligible** to re-enroll in 4-H **unless they are still in high school**.
3. Marriage and parenthood do not disqualify individuals from 4-H membership and participation provided other membership requirements are met.
4. The county of residence is the primary county for 4-H enrollment. Youth are encouraged to enroll in their home county. Participation in a county 4-H program outside of the county of residence should not be undertaken without careful consideration because of special problems. Also, entire families should select the county they will participate in rather than having family members enrolled in two or more counties. A 4-H member cannot be enrolled in the same project in two counties at the same time. Bordering counties can determine local guidelines for cross-county enrollment.
5. Members are allowed to transfer their membership in 4-H from counties or from states any time during the year and to complete their 4-H year in their new location. While a member cannot be enrolled in more than one county at a time, a project may need to be completed in another county because of changing family situations. 4-H members transferring from one county to another are accepted by that county and given full credit for their past 4-H work or achievements.
6. 4-H membership is signified by--
 - * completing an enrollment card; or
 - * completing a group report form. (for example, EFNEP, FSNEP, camps)

4-H VOLUNTEERS

1. 4-H volunteers are essential to the Montana 4-H Youth Development program. They are valued by MSU Extension and Montana 4-H. At the same time, 4-H volunteers serve at the pleasure of the local County Extension agent. Volunteers are defined as members of the staff who give time and expertise without receiving or expecting monetary compensation. Volunteers are expected to follow the guidelines in the **4-H Councils and Committees** publication (#5281) in order to help their club fulfill their

financial responsibilities. Volunteers are not allowed to charge for their services while performing as 4-H volunteers, such as leading project workshops, clinics or other educational activities. Volunteers support the mission of 4-H and MSU Extension and help, or teach others to help, and strive to attain personal goals.

2. The role of the volunteer staff is to assist the salaried staff in any or all aspects of the 4-H program including leadership and support. Adult volunteers must be at least 19 years of age. Youth volunteers (teen leaders) are persons under 19 years of age, may be 4-H members, and must be under the supervision of an adult. Adult volunteers between ages 19-21 are not eligible to serve as chaperons for 4-H activities, events or trips.
3. Volunteers work directly with 4-H clubs, manage county, district or state 4-H events and activities, work with youth in special interest or school enrichment groups, and are involved in short term activities (for example, day camps, overnight camps, contests, etc.).
4. Volunteering in Montana 4-H is a privilege and an honor, not a right. In order to provide a safe and secure environment for the young people who participate in the program, 4-H volunteers must participate in a volunteer screening process. All new adult volunteers must be approved by a 4-H staff member and must complete a 4-H Leader application and/or leader enrollment card and signed policy statement on file with the County Extension office. 4-H clubs must be open to all and club leaders cannot discriminate against anyone based on race, creed, color, religion, marital status, political affiliation or sexual orientation. This inclusion statement is included on the volunteer application form which must be signed by all volunteer leaders, indicating that they understand and will comply with our policy of inclusion.
5. Mailing lists comprise a system of records established to assist in carrying out the various programs of the Cooperative Extension system. The release of these lists could adversely affect the credibility of Extension within the community. These mailing lists are for the sole use of Extension personnel and should not be furnished directly or indirectly to any other person, firm, association or federal government agency unless authorized by the Director of MSU Extension. County Extension offices can share mailing lists with other county Extension offices if necessary. Mailing lists are not to be used for private solicitations or sales.

Mailing lists are NOT Federal records and, therefore, not covered by the Federal Freedom of Information or Privacy Acts that pertain to Federal records. Under Montana state law, state agencies are prohibited from distributing or selling mailing lists. No mailing list of 4H participants should be distributed or sold. State public records laws or privacy rights may apply to 4-H participant records. As such, legal consultation with the MSU Legal Counsel or County Attorney is recommended for the proper handling of access requests.

6. Montana 4-H and the MSU Extension reserves the right to reject an application or terminate the services of a volunteer if the individual's actions are found to be in conflict with the best interests of the program. No action shall be taken without prior approval of Extension administration at the county, region and state levels who shall insure that the action is in keeping with the civil rights of the person(s) in question. Upon approval, the Extension agent responsible for 4-H will notify the person by **CERTIFIED MAIL** that they shall not be accepted as or shall no longer be recognized as a volunteer 4-H leader or resource person.
6. A 4-H volunteer is any enrolled person, adult or teen, in a leadership capacity who contributes time to the promotion, organization, assistance or leadership of a 4-H organization, and is not paid for services rendered as a volunteer. There are several categories of volunteers, including:

4-H Organizational Leaders. The adult who is responsible for the proper functioning of the 4-H club and who works cooperatively with the County or Reservation Extension Office. Organizational leaders facilitate regular club meetings and keep the club organized and operating. They recruit project leaders, guide and coordinate club activities in cooperation with club officers and parents and/or guardians, guide members in project selection, provide opportunities for members to learn parliamentary procedure, and help develop leadership and citizenship opportunities for youth.

4-H Project Leader. The adult or teen leader responsible for a given project area in the 4-H club. These leaders help 4-H members gain specific knowledge and skills in subject matter, encourage members to show what they have learned through demonstrations, record books, speeches, and other presentations.

4-H Activity Leader. The adult, teen leader, or youth volunteer responsible for designated 4-H activity(ies) in the 4-H Club. These leaders are often responsible for non-project activities. They may work with individuals, small groups, or even the entire club. This leader may work with demonstrations, recreation, judging, community service projects, or other special events.

Middle Managers or Key Leaders. Adults who assist local 4-H club leaders and/or Extension agents in a specific 4-H project or activity area. These leaders are knowledgeable about 4-H, proficient in a particular subject area, and are willing to share their talents and skills with other leaders on a volunteer basis. The main responsibility of Key Leaders is to recruit and offer assistance to other leaders in their assigned projects. They may help on an individual basis and in groups, conducting workshops and demonstrations, or serving in other 4-H leadership roles.

Teen Leaders. These teens may assume the major responsibility for a project, activity or a 4-H club of younger members with adult assistance and guidance. Teen Leaders are 14 years of age or older and should be enrolled in the Teen Leadership Project. Youth can be actively involved as leaders and should be viewed as assets to the 4-H program. Montana 4-H encourages the use and involvement of youth as volunteers and leaders.

Junior Leaders. Experienced 4-H members, usually over the age of 12, who assist adult volunteer leaders with projects, activities, or organizational matters.

4-H Ambassadors. Two youth per county can be selected as 4-H Ambassadors. These youth serve as promoters of the 4-H program and must be at least 14 years of age. Ambassadors must have the approval of the Extension agent and the County 4-H Council.

Enrichment Program Volunteer. An adult who leads a special interest or enrichment program using 4-H curriculum, usually in the classroom during school hours.

4-H Resource Leader. A special person or group of people including parents, relatives or friends who listen, question, and respond in helpful ways to children. These leaders could also judge at 4-H events. Resource leaders may be those who want only a limited role in 4-H and prefer not to become involved in other parts of the program.

7. **Volunteer Liability** - 4-H volunteers acting in an official capacity for the MSU Extension are, in part, carrying out the business of Extension . To that extent they are covered by Section 2-9 -305, MCA 2005, which provides them with liability protection (not accident or medical insurance) while acting within the course of their official capacity as a 4-H volunteer leader unless the claim is based upon intentional tort or felonious act.
8. Extension salaried staff and volunteers are expected to act in good faith and without negligence in the performance of their duties in order to minimize any chance of creating a University liability.
9. In order to protect individuals, salaried and volunteer staff are encouraged to avoid, where possible, being alone with a single child. Extension salaried and volunteer staff are not to fraternize with 4-H members under the age of 18 outside of Extension program activities. Salaried and volunteer staff are expected to conduct themselves as professionals in all interactions with 4-H members and leaders.

CONDUCT

Working with youth in the Montana Extension 4-H youth development program is a privilege and honor. Volunteers and Extension staff are to be positive role models. At the same time, youth are expected to abide by established rules of conduct for 4-H events and activities. A “Participation Agreement for State 4-H Activities” form is available in the 4-H Risk Management notebook which outlines a specific code of conduct.

Montana 4-H reserves the right to deny any person the opportunity to participate in 4-H activities if the person's conduct poses a potential threat of injury to persons or property, substantially interferes with the orderly operation of the 4-H program, or endangers the safety and security of others. Volunteers serve at the pleasure of the University and may be dismissed at any time.

Persons denied participation in 4-H activities will be provided notice in writing of the reasons for the decision. The decision may be appealed according to the procedures outlined below.

APPEALS - Youth and volunteer staff may appeal denial of participation or other disciplinary action by submitting a written request for reconsideration to the County Extension Agent within ten (10) calendar days of the receipt of the notice. If the County Extension Agent made the disciplinary decision, the appellant shall send the written request for reconsideration to the Director of the 4-H Center for Youth Development within ten (10) calendar days of the receipt of the notice. The decision of the Director of the 4-H Center for Youth Development shall be final.

ORGANIZATION AND STRUCTURE

1. The 4-H program is an educational program of Montana State University and Extension.

4-H Club members are expected to—

- Complete a member enrollment card and enroll in at least one project
- Pay membership dues, if applicable.
- Attend and participate in meetings—club and project
- Set goals and measure progress towards those goals
- Keep records in each project in which they are enrolled
- Complete the projects in which they are enrolled and evaluate their 4-H experiences through their record books
- Participate in community service activities
- Participate in club fund-raising activities as necessary

4-H Clubs are expected to—

- Have a minimum of 5 members and at least one adult leader
- Elect officers
- Meet regularly
- Follow the fiscal guidelines in “So, You’re the Treasurer of Your 4-H Club” (#5242—revised June 2004).
- Submit a yearly program plan to the county Extension office
- Set annual club goals and evaluate progress toward those goals
- Plan an educational, experientially-based program
- Abide by and follow 4-H policies and procedures
- Submit an annual financial summary report and audit
- Be involved in community-service activities
- Keep records of their activities
- Support the values and ethics of the 4-H program and positive youth development
- Participate in the county 4-H council

4-H club and project leaders are expected to—

- Complete a leader enrollment application form
- Participate in leader trainings
- Fulfill responsibilities for handling funds according to the Financial Guidelines in the 4-H Treasurer's book (#5242—revised June 2004).
- Follow the Audit Guidelines in the 4-H Treasurer's book (#5242—revised June 2004)
- Hold educational meetings to help youth increase their knowledge and skills
- Guide 4-H'ers in the planning of their club program and projects
- Build youth and adult partnerships
- Provide appropriate supervision at club activities
- Pay leader dues and pass the volunteer screening procedures required of volunteers.

2. The types of 4-H enrollment are defined as:

ORGANIZED 4-H Club - an organized group of youth with volunteer leaders, officers, and a planned program that is carried out throughout all or several months of the year. These may be single project clubs (for example, a horse club) or multi-project (community) clubs. In most cases, organized clubs have a constitution, by-laws, and a charter.

CLOVERBUDS - Youth ages 6-8 years are eligible to participate in the 4-H Cloverbud program. The 4-H Cloverbuds curriculum is specially designed to meet the needs and interests of these youth. Youth in this age group **ONLY** enroll in Cloverbuds although they participate in a wide variety of activities common in the 4-H program. Cloverbuds do **NOT** participate in competitive activities and are not to be judged against others. The emphasis is on fun and learning in informal settings.

An enrollment card should be completed for each Cloverbud member. Cloverbuds can attend camps, but should never participate in overnight outings. Cloverbuds can exhibit in a special "Cloverbuds" division at the fair, but these exhibits should not be competitively evaluated. No live animals are to be exhibited. Cloverbud groups typically do not have club officers, they do not participate in fund-raising, and do not participate at state and regional events.

Youth under the age of nine or who will not turn nine during the 4-H year are not permitted to participate in 4-H or 4-H sponsored peer competitive events or activities. Peer competition is defined as two or more individuals or groups working to achieve a mutually-exclusive goal. A 4-H or 4-H sponsored event is one that uses 4-H in the name of the event and/or the 4-H name and emblem promoting the event. Examples of competitive events include judging contests, exhibits, shows, and other performance activities. It is not the intention of this policy to prevent youth under age 9 from participating in informal games at 4-H gatherings or meetings (e.g. a family volleyball

game at a 4-H picnic; a game of dodge ball at a 4-H meeting, or other similar examples).

For additional information about Cloverbuds, please consult the publication, 4-H Cloverbuds: Agent and Volunteer Leader Guide (#5274).

SPECIAL INTEREST - a group of youth participating in educational programs organized and/or coordinated by Extension, meeting for specific learning experiences and not part of the school curriculum. This includes EFNEP and Cloverbuds.

ENRICHMENT PROGRAMS - a group of youth receiving learning experiences not involving organized club activities coordinated by Extension in cooperation with other community agencies (schools, churches, youth centers, youth programs, recreation departments or instructional television).

INDIVIDUAL STUDY – Participation in organized 4-H clubs is the preferred method of membership and is encouraged. Enrollment as an independent member or “member at large” should be the last choice after every reasonable effort has been made to join a 4-H club. The final determination for allowing independent or “at large” 4-H enrollment is with the local County Extension Agent.

A youngster enrolling for the first time as an independent 4-H member may do so under the following circumstances.

- Distance to an organized 4-H club is so great that transportation costs and travel arrangements would be excessive.
- No 4-H club exists in the vicinity that offers the 4-H project in which the youth wishes to enroll and all reasonable attempts to start a 4-H club have failed.
- A 4-H club exists in the vicinity but does not have room to enroll the youth. (This provision must be on a non-discriminatory basis.)

4. **Other Youth Organizations.** Should another youth organization wish to enroll their members in 4-H, they shall comply with all county, state and national 4-H policies and procedures to be bona fide members. After-school 4-H clubs must follow the same policies and procedures.

5. The official 4-H program year is October 1 through September 30.

SUPPORTING STRUCTURE

1. 4-H programs are more effective when there is a support structure. County Extension Advisory Committees, County 4-H Councils, statewide committees, county 4-H foundations, and the Montana 4-H Foundation are all designed to support the local 4-H program.
2. The overall Montana Extension Advisory Council (MEAC) ensures that Extension programs are addressing relevant social issues and concerns consistent with the

research and staff available through Montana State University. The Council acts as an advocate for Extension organization and its programs. 4-H representation is included in the MEAC membership.

3. The County 4-H Council is an important partner of the county Extension office in carrying out 4-H programs. County 4-H councils assess the needs, interests, concerns of the county's children and youth, and assist the agent in responding with educational programs relevant to those needs. 4-H council membership includes, but is not limited to, all 4-H leaders and teen leaders in the county. Membership may include parents, school personnel, youth workers, and others with an interest in the development of young people.

The primary purpose of the county 4-H council is to provide guidance and assistance to the county Extension staff in planning and conducting educational programs. In addition, the 4-H Council advises the county Extension staff in the establishment of county 4-H policies that are not in conflict with this policy statement. However, the County Extension Agent has the final authority and responsibility for the conduct and leadership of the 4-H program in each county. For more information about the role of the Council and its relationship to Extension personnel, refer to **“4-H Councils and Committees”** (#5281).

The council is the 4-H volunteer's voice in county 4-H program direction and decisions. Since rules tend to restrict rather than expand educational opportunities for young people, councils and Extension staff are encouraged to adopt the simplest and least number of rules necessary to conduct 4-H programs.

4. The Montana 4-H Foundation's mission is to secure private funds to support Montana 4-H educational programs for youth and adults which are delivered by MSU Extension. The Foundation works closely with 4-H staff, leaders and 4-H youth.
5. University faculty and staff lend expertise in subject matter areas through a cooperative effort with the 4-H Center for Youth Development.

MONTANA 4-H FINANCIAL POLICIES AND PROCEDURES

Those who raise funds under the 4-H name and emblem are ultimately accountable and responsible for their appropriate use. Under U.S. Department of Agriculture and Montana State University guidelines, the county MSU Extension office is authorized to monitor such accounts and request audits of all transactions related to finances in 4-H clubs, 4-H Councils and other groups operating under the 4-H name and emblem. Club leaders or others responsible for handling 4-H funds can be removed by the County Extension agent for misappropriation, inadequate reporting or mismanagement of such funds.

Any committee that serves the 4-H program at the county level and has a checking account must be accountable to the County 4-H Council and the MSU County Extension

office for the proper use of such funds. It is extremely important that all 4-H clubs show the source of any money they have raised and how it is disbursed. Funds raised in the name of 4-H must be carefully accounted for and used only in direct support of the 4-H program and appropriate records should be maintained as outlined in the Financial Guidelines of “So, You’re the Treasurer of Your 4-H Club” (#5242).

Federal income tax exemption status for 4-H organizations is a privilege, but also carries a responsibility for openness and accountability. Our tax-exempt status provides opportunities to expand 4-H programs to serve important needs of youth by enabling taxpayers—individuals and businesses—to claim deductions for contributions to 4-H.

The Internal Revenue Service (IRS) ruling letter of February 9, 1973, recognized the tax exemption status of 4-H clubs and affiliated 4-H organizations which are organized and operated under the guidance and control of Extension. This guidance and control must be in keeping with the “*Regulations Governing the Use and Authorization of the Name and Emblem of 4-H Club Work*” (a copy of which should be on file in every Extension office).

4-H clubs or groups are public groups, open to all without regard to race, color, national origin, sex, disability, religion or age. The money clubs receive from dues and fund-raising events is owned by the club, not by any one member or leader or the group. Because 4-H is a public organization, it is not “owned” by individuals the way a company is owned. Instead, 4-H is owned by the public.

Federal guidelines require that every 4-H club that has a checking or savings account and receives more than \$10 in interest in any one calendar year is required to have an Employer Identification Number (EIN). 4-H clubs with money in a bank need to apply for an EIN from the Internal Revenue Service using Form SS-4. Bank accounts must not be under individual’s social security numbers but rather an EIN. Ultimately, 4-H club leaders are responsible for sound fiscal management and oversight of the funds in each of their clubs.

4-H Bank Accounts

MSU Extension Agents are not to be listed on club or council accounts as approved signatories **UNLESS** there are compelling, extenuating circumstances that require the agent to be listed on the account. If this is the case, the MSU Extension Agent must request a waiver from this policy from the Regional Department Head and document, in writing, the reasons why his/her name should be listed on the account. Otherwise, MSU Extension Agents should not have their names on bank accounts for 4-H clubs, councils or other 4-H entities or activity accounts.

Extension Agents should remain “an arms length” distance from responsibility for 4-H funds. 4-H funds include club, council and committee accounts. These are not University funds over which Extension agents should normally assume responsibility. The responsibility and authority of Extension Agents with regard to such 4-H funds is limited to ensuring that they are used to support the quality of the 4-H program. Agents should not normally make disbursement or investment decisions for 4-H funds.

This policy has been formed to guarantee funds are being reviewed regularly and appropriately, which will then ensure consistency in handling funds and accountability for the use of the funds. If followed, the policy will serve to protect Extension Agents from issues regarding 4-H monies but also ensure that monies are being managed in financially appropriate ways.

Each club needs to report its EIN to the bank and the MSU County Extension office. **Banks are required by Federal law to withhold 20 percent of the interest earned on bank accounts until the 4-H organization provides the EIN number. Clubs can be subject to the backup withholding imposed (fined \$50) by the IRS for failure to report an EIN.** 4-H organizations have an obligation to file the Annual Information Return, Form 990, when gross receipts in their tax year normally exceed \$25,000.

All bank statements, receipts, cancelled checks, checkbooks, savings account books and the Montana 4-H treasurer's book, "**So, You're the Treasurer of Your 4-H Club**" (#5242), must be turned in to the MSU County Extension office annually and whenever requested by MSU extension staff. For example, the County Extension Agent can request periodic audits and have financial reports submitted annually to the MSU Extension staff. The County Extension Agent can request periodic audits and may require periodic financial reports to be submitted to the MSU Extension office for review.

All 4-H clubs, committees, councils, boards and groups are required to complete the Annual Summary Financial Report. The Annual Summary Financial Report and supporting documents are due to the MSU County Extension office by **September 30** of each year. The Montana 4-H Youth Program is part of Montana State University Extension, which is, as its name suggests, part of Montana State University. The Annual Summary Financial Report is how MSU Extension-related 4-H clubs help the university fulfill its obligation of fiscal accountability to the residents of Montana. Additionally, these records must be available for public inspection as per IRS regulation.

Fund-Raising

4-H clubs may choose to finance their activities through their own fund-raising activities. Support can be accepted from reputable businesses. Fund-raising should be done for the good of the total group and should be consistent with the county 4-H fund-raising policies. Fund raising should not be the main focus of group activities nor exclude any individual from participation. Clubs are expected to support the financial needs of the total group and when possible, to assist with participant costs in county, state, national and international programs. Soliciting funds from state-wide businesses or organizations should be coordinated with the Executive Vice-President of the Montana 4-H Foundation.

Fund solicitation by clubs should be kept to a minimum and should be undertaken only after consultation with the County Extension agent responsible for 4-H and the County 4-H Council. Organized and extended annual solicitation of funds, gifts, awards and clothing for purely 4-H activities is discouraged. To maintain good will, avoid repeated calls upon the same local supporters.

4-H events and activities, including raffles, must have a clear educational goal or purpose and should be primarily for the benefit of 4-H members. Any event sponsored for the purpose of raising funds should be limited to fund raising to support the educational mission of 4-H.

For any event or activity for which funds are collected (for example, entry fees, raffle ticket sales, registration, etc.), appropriate financial management practices should be followed, with a detailed accounting for income and expenses following the steps outlined in the Montana 4-H Treasurer's Book. A financial report must be given to the county Extension agent within 30 days after the conclusion of the event. If such reports are not filed, the MSU Internal Auditor will be contacted to conduct an investigation.

Funds from 4-H events may not be divided up amongst individual club members or otherwise used for personal, rather than 4-H, related expenses. For official 4-H events for which funds are raised, if revenue is generated from the event, the revenue must be placed in an account to be used by the sponsoring club or 4-H entity as referenced in the Financial Guidelines in "So, You're the Treasurer of Your 4-H Club" (#5242—revised June 2004). Contributions earmarked by a donor for a particular individual are treated, in effect, as a gift to the designated individual and is not deductible as a charitable contribution.

Games of chance, lotteries, betting activities involving money, and other related kinds of activities do not support the mission of 4-H and should not be engaged in.

Fifty-Fifty Fund Raisers

Montana 4-H does not condone nor support 50/50 type fund-raisers or raffles. These kinds of fund raisers are not to be conducted under the auspices of 4-H nor be associated with the 4-H name and emblem.

Raffles

The purpose of conducting raffles under the name of 4-H should be to support the educational programs of 4-H. Funds raised under the name of 4-H belong to 4-H and must be used only for the 4-H program and its participants. As a guideline, 4-H clubs should be conducting raffles only where a product is awarded to the winner, not cash. Products should be of good quality and should represent the organization well. The cost of raffle tickets cannot be deducted by individuals as a charitable contribution to 4-H as raffles are considered a form of gambling.

For non-profit organizations like 4-H, there is no formal permit required to conduct raffles. However, since the state turned control of raffles over to County Commissioners and Tribal Councils, 4-H groups wanting to hold a raffle should check with their local County Commissioners' or Tribal Council office to see what requirements they have in place. For example, some officials will require an accounting of the raffles, while others will not. Be sure to ask if they have any regulations about 4-H youth (minors) selling raffle tickets. For-profit groups need to acquire a permit through their local County Commissioners' office.

Neither non-profit nor for-profit groups can solicit outside the state, but they can go across county lines. A 4-H group conducting a raffle should check with the County

Commissioners in the county or Tribal Council on the reservation where the drawing will be held about any requirements for raffles. For-profit groups should acquire their permit in the county where the drawing will be held.

Handling Funds from Disbanded Clubs

Any 4-H club or group that disbands with money left in its account must turn over those funds to the county 4-H council or county MSU Extension office within a minimum of six (6) months after disbanding. All property belonging to the club must be disbursed in the same manner. Club members may request that the money be used for specific 4-H programs within the club, county or state. This request will be acted on by the county 4-H council in concert with the Extension agent responsible for 4-H Youth Programs at the time the club is dissolved. When a 4-H unit is disbanded, the Regional Internal Revenue Service office in Ogden, UT must be notified so that the EIN number can be canceled for the unit.

Handling Funds in Clubs That Split

If a club or group decides to divide itself (for example, because it has become too large), creating more than one recognized and properly registered club or group, the funds from the original club must be evenly disbursed, based on membership, in each club. Dollars are not to be split out on an individual basis.

If a portion the club membership voluntarily decides to leave an existing club and form a new club, the members of the old club may choose, by voting, to provide the new club with a portion of the funds from the original club. However, any sub-group that decides to leave an existing club is not automatically entitled to any funds from the original club. Leaving an existing club to start a new club relinquishes any claim to funds from the original club, regardless of the amount of previous fund-raising efforts provided by individual members. 4-H monies do not belong to individuals.

Handling Complaints

The MSU extension agent responsible for 4-H Youth Programs must investigate the disbursement of 4-H funds by any club if a complaint is made by 4-H members, leaders or parents. Issues of this nature can be avoided by following these guidelines. Concerns can be settled quickly if clubs have kept their books up-to-date and have followed these guidelines.

Dispersal of Money from Statewide 4-H Events

When a statewide 4-H event or activity is held, it is the responsibility of the 4-H Center for Youth Development to oversee the program development and implementation. Because it is a statewide event and the 4-H Center for Youth Development is involved, the Montana 4-H Foundation also has an obligation to support, providing the event/activity is listed in the budget. Both the 4-H Center for Youth Development and the Montana 4-H Foundation office are accountable for the details surrounding the activity/event.

In most cases, the 4-H Center for Youth Development will partner with a District, host County or statewide committee to conduct a statewide event/activity. This ensures more comprehensive planning for the program as well as considering the geographic challenges of the state.

Any funds left from hosting a statewide 4-H event or activity should follow the following guidelines and will be dispersed in according formula outlined. This applies only if there is over \$50 left in the event/activity account. If less that \$50, the hosting entity may disperse the money as they please.

- A budget showing expected income and expenses must be developed by the sponsoring group.
- A request for a budget item must be made to the Montana 4-H Foundation prior to October 1 of each year.
- Event accounts must be connected to a local or state 4-H entity such as the County 4-H Foundation, the County 4-H Council, the Montana 4-H Foundation, the Montana 4-H Council. A separate account may be established, but it must be under an official 4-H tax identification number obtained by a one of the listed entities.
- Any loans must be paid prior to distributing any final balances.
- An ending financial summary must be submitted for review to ensure accountability.
- If the event/activity has a positive balance after all expenses are paid, the money should be distributed as follows:
- Up to \$500 remains in the host county, district or with the committee for distribution
- The remainder is divided equally between the host entity and the Montana 4-H Foundation ---Event/Activity Account. The account will be capped at \$10,000. Any monies over the \$10,000 will be made available for supporting future statewide events and activities through a yet to be determined process.
- If the event/activity has a negative balance, the expenses will be paid by the Montana 4-H Foundation using the Event/Activity Account first followed by general fund dollars.

4-H SPONSORED EVENTS AND ACTIVITIES

The following criteria are provided to guide counties in authorizing 4-H events and activities.

1. 4-H events and activities must have a clear educational goal or purpose and should be primarily for 4-H members and/or leaders. The purpose for raising funds should be to support the educational mission of 4-H.
2. Any new 4-H fund-raising projects should be approved by the county Extension agent. Funds raised under the name of 4-H belong to 4-H and must be used only for the 4-H program and its participants.
3. All official 4-H events and activities must provide appropriate adult supervision

4. Only approved 4-H events may use the 4-H name and emblem in promoting the event. Written approval of the event and the use of the 4-H name and emblem must be obtained from the Extension agent for any new events. If such approval is not given, the group may not use the 4-H name and emblem for the activity or event.
5. The Extension agent must be informed of the start date and end date for each official 4-H event.
6. We recommend that 4-H participants in 4-H events be covered by accident insurance. Participants who are not 4-H members must waive liability and release 4-H and MSU from liability related to their participation. These forms are available on the Montana 4-H web site at: www.montana4h.org
7. For any event or activity for which funds are collected (for example, entry fees, registration, etc.), appropriate financial management practices should be followed, with a detailed accounting for income and expenses following the steps outlined in the 4-H Treasurer's book. A financial report must be given to the Extension agent within 60 days after the conclusion of the event.

For official 4-H events for which funds were raised, if revenue is generated from the event, those proceeds reside with the sponsoring club or 4-H entity. Funds are not to be divided up amongst individual club members.

If a loss occurs, the sponsoring 4-H club or entity is responsible for covering the loss, not the county, region or state.

GRIEVANCE PROCEDURE

Each county is strongly encouraged to set up their own grievance procedure to handle grievances at the local level. Following is the state grievance policy that may be adapted for use at the local level.

For those who feel aggrieved due to some action in the 4-H program, the following steps should be taken.

1. A written statement of grievance shall be filed by the party(ies) grieving the process or decision. The statement should include the following information at a minimum—
 - a. The date of the incident
 - b. The name(s) of the people filing the grievance
 - c. A complete statement describing the incident including all facts upon which the complaint is based
 - d. Any rules, regulations, policies or procedures that have been violated, if any
 - e. List of the names and addresses (preferably with phone numbers) of people who have been involved in the incident and their role in it
 - f. Signatures of those submitting the grievance.
2. Grievance Committee

A committee of 3-5 people will be appointed by the 4-H Center for Youth Development to:

- a. narrow and define the issues related to the incident
- b. gather information related to the incident which may include—
 - identifying and obtaining input from people
 - reviewing documents
 - other processes deemed necessary by the committee.
- c. prepare recommendations for the resolution of the grievance. The recommendations will be non-binding and no testimony used by the grievance process may be used for other purposes.

The grievance statement should be filed with the appropriate person(s), for example the County 4-H Grievance Committee, County 4-H Council Executive Committee, State 4-H Council, 4-H Center for Youth Development, etc.

INSURANCE ISSUES

Accident Insurance

All 4-H clubs are recommended to utilize year-round accident insurance. In other words, all county activities should either—

- Require that all participants have accident insurance
- Provide accident insurance, or
- Require a legal document from parents/guardians of participants waiving responsibility of the organization for providing insurance.

Policies are available from a variety of companies, such as American Income Life (www.ailins.com). For a full list of sources, please refer to p. 46 of the Risk Management Handbook in your office. Some companies and policies will cover many 4-H activities. Others are for specific programs only. Be sure to check.

Liability Insurance

Montana State University's liability insurance covers MSU Extension personnel and 4-H leaders who, in their scope of duties, are required, requested, or authorized by the MSU Extension to carry out programming responsibilities. More information can be found on p. 47 of the Risk Management Handbook which should be in your office. Certificates of proof of coverage for your 4-H programs (such as when you use private horse arenas or other meeting places) are available from the MSU Safety & Risk Management Office by calling Jeff Shada at 994-2711.

Medical Authorization

A medical authorization form is required for each member to participate in any activities when travel or overnight stays are involved. One copy of the completed authorization form should be kept with the member and one copy should be kept with the adult responsible for the member for the duration of the event and for travel to and from the event.

Some parents object to signing medical authorizations for personal or religious reasons. In such cases, parents can choose to accompany their children to 4-H events, to make themselves available to provide medical authorization in the event of an accident.

The following forms are available—

- Health Statement and Medical Release Form
- Authorization to Consent to Treatment of Minors
- Permission to Travel by Personally Owned Auto or Permission to Travel with Others
- Permission, Release and Assumption of Risk for Participation in 4-H Horse Projects
- Permission, Release and Assumption of Risk for Participation in 4-H Livestock Projects

These forms are available in the 4-H Risk Management notebook in each Extension Office and on the Montana 4-H web site at: www.montana4h.org

4-H CURRICULUM

4-H is an educational program of Montana State University and the land-grant system. As an educational program, we provide "textbooks" for our youth (students) to aid in their learning and growth. In the same way, record books are a required part of EVERY project. There is no project area of Montana 4-H that is exempt from keeping records—even Cloverbuds have a record form.

Record keeping is an integral part of the 4-H learning experience. All 4-H members are expected to keep their records up to date and to complete their records as a part of project completion:

- in order to apply for and participate in a county Ambassador program, a 4-H member's records books must be up-to-date as certified by the 4-H club leader. If interviews are held to select county Ambassadors, records should be brought along by each applicant as a source of reference and documentation. The Teen Leadership project plan, record and summary should be part of this record.
- to apply for and interview for a state Ambassador officer, an up-to-date record book must be brought to the interview as supporting documentation and personal reference;
- to participate in the 4-H Fashion Revue at Montana 4-H Congress;
- to apply for state scholarships;
- to participate in the Western 4-H Roundup in Denver, county agents will need to verify that each member has an up-to-date record book; however, record books will not be taken to the event in Denver;

Records are an integral and necessary part of every 4-H project. Record keeping is required as a part of the 4-H experience. Records are not to be judged for awards, nor placed using ribbons or other quality indicators. They should simply be reviewed for completion. In the same way, project manuals are NOT to be judged.

Project Completion

Records **must be completed** in order to successfully complete a project. The minimum set of records that must be completed consist of at least two and perhaps three forms: My 4-H Year, Project & Financial Journal and the Animal Journal. In order to receive a “Gold Seal of Excellence,” each member must complete a set of records for EACH project in which he/she is enrolled after your county “drop/add” deadline. A complete set of records includes eight criteria that are listed in the publication, For the Record on page 2.

Project Manuals

Like records, the project materials are a required part of each project. As an educational program, our project manuals are the “textbooks” for 4-H projects and are a required part of each project experience. Youth cannot participate in a 4-H project without using the required project manuals to guide their learning experiences.

Out of State Recognition Trips

4-H members may attend more than one out-of-state recognition event during the 4-H year. To receive an out-of-state recognition trip, however, a member must win one of the statewide 4-H contests listed in the Congress guidelines manual.

PROJECTS AND ACTIVITIES

1. State and local projects, activities and events are open to all youth who meet eligibility requirements for the specific project, activity or event. Requirements and regulations shall be clearly stated in the support materials for each project, activity or event.

The 4-H Center for Youth Development, in conjunction with the sponsoring group, board, or committee, shall be responsible for developing these requirements and regulations and resolving conflicts for state projects, activities and events.

The local Extension agent in conjunction with the local sponsoring group, board, or committee shall be responsible for developing these requirements and regulations and resolving conflicts for local projects, activities and events.

2. Participants in any part of the 4-H program (project, activity, event, etc.) are encouraged to achieve the goals and objectives for that specific part of the 4-H program. **A 4-H member who does not attain the goals and objectives that have been set for any one part of the 4-H program may be excluded from participating in other parts of the 4-H program (including projects) or from re-enrolling in 4-H.**

CHILD PROTECTION GUIDELINES

Montana 4-H has developed a policy statement on child abuse and neglect because we are concerned about the safety and welfare of children. As a youth development program, we must take a firm stand to ensure that children are treated with respect and that their safety is guaranteed while participating in our programs. In an effort to clarify Montana 4-H's position on this critical issue, the following policies have been adopted for use in all counties.

Corporal Punishment

Montana 4-H, as a division of the MSU Extension, abhors violence against children in all its forms. Montana 4-H expressly prohibits the use of corporal punishment in settings where children are cared for or educated by 4-H volunteers and staff, and supports the use of appropriate disciplinary alternatives. Montana 4-H reaffirms its position that children have a right to a healthy and nurturing environment at all times. Appropriate disciplinary or corrective action will be taken when a volunteer or staff member's use of corporal punishment is identified and confirmed.

Reporting Suspected Child Abuse/Neglect

Sexual, physical, or emotional abuse of children is antithetical to the goals and values of 4-H and will not be tolerated nor condoned in this organization. Child abuse in any form affects a child's life during the abusive period but also affects the child long after he/she has become an adult. It is of utmost importance that suspected child abuse and neglect be reported to appropriate officials so that families have an opportunity to receive assistance in developing healthier family patterns. It is the policy of this organization that all volunteers who suspect that child abuse or neglect is occurring will make a report to the local Department of Public Health & Human Services.

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