

## **4-H COST RECOVERY**

**Vision:** Funding Cooperative Extension 4-H youth development educational programs through a new support and delivery structure that will enable creative programming so that the 4-H/youth development program can grow and be delivered in a quality way to all youth who desire to be a part of the program.

**The Current Situation:** The 4-H youth program is supported by Cooperative Extension from federal, state, and county funds along with grants, gifts, and fund-raising efforts. Budget shortfalls have challenged the 4-H program in meeting the needs of Pennsylvania youth. It is estimated that it costs about \$100/year for a youth to be involved in the 4-H program. There are 122,568 youth taking 157,000 projects and 10,557 volunteers involved in the program.

Some counties charge minimal fees to cover insurance, fees for school enrichment programs, camps, and work with other agencies. Many 4-H clubs conduct fund-raising events to pay for local expenses. However, there is no uniform statewide cost recovery fee.

Approximately \$274,000 a year is incurred in expenses for 4-H educational materials that are provided to 4-H members and other youth. This includes both Penn State printed and produced material and purchased curriculum materials. The average project curriculum material costs approximately \$3.00 per book.

**Process:** A 4-H Revenue Generation Task Force\* developed a set of recommendations that have been discussed with the college administration, extension leadership team, county extension directors, extension educators, 4-H volunteers, and PCCEA. After examination and study as to what is practical and reasonable, the following practices are recommend for consideration.

**Access for all youth:** No child shall be denied access to 4-H programs based on their ability to pay. County extension educators and leaders have developed trusting relationships with local youth and their families and will use utmost discretion in identifying those who truly are unable to pay.

### **Recommendations:**

**The College of Agricultural Sciences cost recovery policies will be followed and adhered to as appropriate guidelines in implementing the 4-H program guidelines.**

Program enhancement fees will be established in the following ways:

**A. 4-H CLUB MEMBERS:** A \$10.00 annual educational materials fee will be assessed on all 4-H club members to help cover a portion of the costs of 4-H project books, resource materials, curriculum development, and program marketing. Members will be provided a reasonable number of project books based upon the number of projects they intend to complete. Other 4-H membership materials and program benefits from the state office are also available to each member. Counties may also add to this fee any additional expenses, such as insurance and supplies that are paid locally.

**For 4-H members in school settings, the classroom fee will apply versus the educational materials fee.**

This fee will be used by the state 4-H program to help cover the cost of educational materials used by the schools and thereby release resources to develop and train on new youth programs, educational and technology-based materials.

The effective date for the annual 4-H educational materials fee will be November 1, 2003. The first payment of this fee will be mailed with the A-100 report due on September 15, 2004 and will cover the educational materials fee for the 2003-2004 program year. Checks should be made payable to Penn State University.

Depending on availability of local funds, a county may choose to pick up a portion of the cost so that a smaller portion of the educational materials fee will be passed on to the 4-H member. 4-H clubs may wish to conduct fund-raising events such as auctions, special dinners, and so on. See the 4-H policy handbook, section 7 for approved fund-raising activities.

**B. SCHOOL CLASSROOMS:** A \$20.00 classroom fee will be established for school enrichment programs. A minimal charge of \$20.00 per classroom will be assessed and forwarded to the 4-H Educational Materials Fund to help offset the cost for printing, purchasing, and developing educational materials. This cost may be supported in whole or in part by the county 4-H program, especially in schools that serve low-income neighborhoods (effective August 1, 2003). If a county wishes to hire a program assistant to teach in the schools, an additional fee could be assessed locally to support the actual cost.

The effective date for the school classrooms fee will be August 1, 2003. The first payment of this fee will be mailed with the A-100 report due on September 15, 2004, and will cover school enrichment programs for the 2003-2004 program year. Checks should be made payable to Penn State University. (NOTE: For the 2003-2004 program year, this initiative will have a soft roll out since many schools may have already finalized budgets before the policy is in place. The extension agent is to make every effort to collect all or part of the classroom fee but should not deny programming due to budget constraints. Schools should be alerted that the fee will not be waived for the 2004-2005 program year.) An exemption from the classroom fee may be granted for schools who have 70 percent or more students enrolled in the free and reduced lunch program.

**C. HOME SCHOOL YOUTH:** Home school youth are encouraged to join a 4-H club to benefit from the club experience. Families that do not join a 4-H club will be expected to pay the total cost for 4-H educational materials. 4-H publications can be ordered directly from the Publications Distribution Center. Checks should be made payable to Penn State University.

**D. TEACHER AND SPECIAL PROGRAMS AND WORKSHOPS** – For teacher and leader workshops for other groups such as agencies or other youth organizations and for out-of-school time, day camps, field days, after-school, and other similar programs for other organizations or agencies, fees will be initiated and determined by state and county staff based upon the Penn State Cooperative Extension Cost Recovery Worksheet. Workshops hosted or conducted by extension agents or faculty will add an additional \$5.00 per person to the registration fee to cover follow-up for technical support and developing new program materials. Teachers who participate and deliver programs will not be assessed this classroom fee. This fee will be sent to the State 4-H Office, 323 Ag. Admin. Bldg., University Park, PA 16802.

**E. STATE AND NATIONAL EVENTS:** \$10.00 will be added to participant fees for state and national events. This fee will go to cover some of the state expenses incurred to sponsor and participate in such events. State and national events impacted by this will include: 4-H State Achievement Days, 4-H Ambassador Conference, 4-H Capital Days, Keystone Youth Leadership Conference, Citizenship Washington Focus, National 4-H Conference, National 4-H Congress. Other national events will be determined at a later date. (Effective November 2003) This fee will be sent to the State 4-H Office, 323 Ag. Admin. Bldg., University Park, PA 16802.

**F. OTHER SITUATIONS WHERE 4-H EDUCATIONAL MATERIALS ARE UTILIZED:**

- a. Agencies and organizations outside of extension who use 4-H curriculum will continue to be charged for the materials they wish to use. These charges are determined using the Publication's Distribution Center guidelines.
- b. 4-H publications used in grant and contract sponsored programs will be purchased from the Publications Distribution Center (effective July 1, 2003).
- c. 4-H publications requested by adults and/or used in such programs as the Master Gardener program will also pay for their educational materials (effective July 1, 2003).

**G. SUMMARY OF OPERATIONAL LOGISTICS:** A new budget will be established to account for 4-H educational material fees collected and corresponding expenditures. The budget will be called the Extension 4-H Educational Materials Fund. The budget will be established as a miscellaneous fund administered through the College Publications Committee.

\* The State 4-H Program Office, 323 Ag. Admin., will be responsible for enforcement of 4-H cost recovery policy to include collection of required fees and forwarding to the Publications Distribution Center for depositing.

\* The State 4-H Program Office, 323 Ag. Admin., will continue to be responsible for publication management responsibilities to include coordinating publication revisions, adding or removing titles from inventory, and initiating publication orders.

\* **Implementation timeline:**

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| May 2003         | Begin extension cost recovery process for teacher and special programs and Workshops. First submission of fees will be by January 15, 2004.   |
| July 1, 2003     | Establish Extension 4-H Educational Materials Fund.   |
| August 1, 2003   | Classroom fee effective date, with payment due September 15, 2004, with the A-100 report. Deposit to Extension 4-H Educational Materials Fund.  |
| November 1, 2003 | Begin to collect member educational materials fees. These fees will be submitted with the A-100 in September 2004 and deposited to the Extension 4-H Educational Materials Fund.                                |
| July 1, 2005     | All 4-H educational material expenditures and cost recovery fees run through the Extension 4-H Educational Materials Fund. Funds collected must cover the cost of future 4-H publications printing or purchase. |

A set of frequently asked questions have been developed for extension staff to answer specific implementation questions.

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## **4-H COST RECOVERY AND 4-H REVENUE GENERATION**

### **Frequently Asked Questions**

**1. How will the funds acquired in 4-H cost recovery be used?**

The funds acquired through the 4-H cost recovery effort will be used to pay for project books, resource materials, curriculum development, and program marketing. These funds will be administered under the direction of the director of cooperative extension, by the 4-H program staff in the Department of Agricultural and Extension Education, with input from the 4-H Curriculum Committee, the YPCC Advisory Committee, and the Youth Program Coordinating Council. Funds raised through 4-H development opportunities will be spent on program priorities which may include: leadership development, curriculum enhancement and development, volunteer and member recognition, staff support and training, and program marketing. Funds raised through these efforts will be overseen by an advisory board that will determine expenditure priorities.

**2. What is a reasonable number of project books per participant?**

Reasonable number of project books should be determined by the club leader and extension agent and based on age of the participant and number of projects successfully completed the previous year.

**3. What happens if a 4-H member says he/she is unable to pay the educational materials fee?**

Depending on availability of local funds, a county may choose to pick up a portion of the cost so that a smaller portion of the fee will be passed on to the 4-H member. Clubs may also fund-raise to support educational material fees. Leaders may complete a request for support from an opportunity fund. A form is available for use.

**4. Do families with more than one child in 4-H get a discount?**

No, each 4-H member is expected to pay the \$10.00 annual educational materials fee.

**5. How do I get the number of 4-H members with duplicates removed?**

These steps will allow a county to determine the number of members with duplicates removed:

- A. Open the Clover Counter People file. Type EDIT in the password dialog box. Click OK.
- B. From the Main Menu, at bottom-right of screen, click the End-of-Year Reporting button.
- C. Click the Record # button to switch to the End-of-Year Reporting Record # Screen.
- D. Click the Assign #'s button. Read the message. Click Yes.
- E. From the Mode menu choose Find.
- F. In the "Rec#" field, type 1. In the "Stat" field, select M from the drop-down list
- G. Click the Find button.

The number of found records (on the left-side of the screen) will be the number of members with duplicates removed.