

Final Report of the Joint Task Force on Managing a Changing Portfolio

http://www.csrees.usda.gov/qlinks/pdfs/portfolio_report.pdf

The national Cooperative Extension System (CES) has undergone significant change in the past 30 years; 1890 institutions and 1994 tribal land-grants were added, and programming has expanded in the human sciences. The CES has also become a trusted source of professional training and certification programs. However, despite the growth in partnerships and program portfolios, financial resources have shifted. Base federal funding has remained flat with a shift to core competitive funding models. Many states have increased support for CES, but that trend is not uniform. Support at the local level is patchy with some local governments increasing support and others providing none. As state and local governments increased appropriation levels in line with federal funding, more attention has been placed on state and local issues, possibly leading to a more fragmented national CES that is more responsive to state priorities rather than national priorities. While changes in funding models are unlikely, the CES must identify the most attractive opportunities for enhanced programmatic and resource generation and proceed in a manner that maintains the quality and integrity of the CES. To that end, the task force developed the following recommendations to bring a more consistent approach to several of the critical issues facing the CES as the funding models continue to change:

Best Practices for Extension Directors/Administrators to Ratify:

Fundraising:

- State CES organizations should take an active role in the coordination of all private fund raising and program operations related to Extension within a state.
- State Cooperative Extension Systems (i.e. host LGUs) which do not already have a professional fund-raising/development unit should add such a function.

Fees:

- Charging fees for CES programs is appropriate in several circumstances. The decision to establish user fees for a particular CES program depends on a number of factors.
- When fees are collected in excess of program costs (e.g. professional training) that the surplus be invested into the originating program area.
- A fee structure or licensing be considered for certain publications and intellectual properties.

Evaluation:

- State CES organizations should continue to develop faculty evaluation and accountability mechanisms which include an evaluation of a faculty member's ability to generate external support for Extension.

Actions for ECOP:

- Create policy statement supporting the recommendation that specific Extension programs should not be privatized and specifying which activities may be privatized under which conditions.
- Create skill-building opportunities in the important area of fund-raising and development.

Actions for CSREES:

- Memoranda of Understanding with federal and state agencies should be developed as effective means to fund Extension activities and broaden the constituency for Extension according to the specific guidelines.
- CSREES should develop grant-writing workshops specifically targeted to the Extension community to maximize the integration of research, extension, and multi-state education functions.
- CSREES should review and amend policies to allow for the maximum flexibility within the law for fee generation.
- The Director of Youth Development at National 4-H Headquarters, CSREES should establish and present criteria for sanctioning of regional and national private or unaffiliated organizations, particularly those with fund-raising activities.

The Cooperative Extension System is a living organization that continues to serve its mission despite changing circumstances. These recommendations may not be appropriate for every institution in every circumstance, but just as Extension educators have adopted CD-ROMs and the Internet for the distribution of program materials, Extension also needs to adopt a new funding environment that contains a greater emphasis on grants, fees, and private contributions to maintain the quality programs Americans have long enjoyed.