Template for MU Extension County Council Business Plan



Name of County

Address

Telephone

Email

Website: <http://extension.missouri.edu/>

## Reliable, Responsive and Relevant to Today’s Needs

*MU Extension, the University of Missouri’s higher education classroom in rural and urban communities in 114 counties, was created by federal and state statutes to ensure people’s access to research-based knowledge to improve their quality of life and economic well-being. As the Flagship land-grant University, MU has a statewide mandate. MU Extension partners with public and private entities to reach more people without duplication of services.*

#### Responding to Today’s Needs

In today’s economy, Missourians are concerned about their jobs, health, family and education. MU Extension in \_\_\_\_\_\_ County is responding by (give just a few high-profile, programmatic examples):

* Program example 1: (include outcomes)
* Program example 2: (include outcomes)

**Using Technology to Expand Educational Reach**

MU Extension in \_\_\_\_\_\_\_ County uses websites; social media; live and recorded video; radio and TV spots; and face-to-face classes and consultations (list all that apply) to reach all ages:

**Continually Changing to Address the Future**

MU Extension is responding to tomorrow’s challenges by:

* Increasing the leverage power of each state dollar by assessing fees and expanding grant and gift revenues. MU Extension leverages each state dollar received 3 times.
* Working with county commissioners, local elected councils, state agencies, legislators and federal funders to ensure MU Extension remains relevant.

**Executive Summary** - An executive summary tells the reader:

1. The fundamentals of the business
2. The product you produce, including a definition of your local program presence
3. Who the customer is
4. Who the owners/board of directors are; how the council is elected, how citizens are represented. Include the state laws that provide authority for the program:

(Revised Statutes of Missouri, Sections 262:550 to 262:620: County Extension Programs, <http://www.moga.state.mo.us/STATUTES/c262.HTM>)

1. What the future is for your business, including funding, resources and partnerships.

**General Description**

Legal name and function: The University of Missouri Extension Council of \_\_\_\_\_\_\_\_\_\_County is the official name of our governing body. We commonly refer to the elected body as the\_\_\_\_\_\_\_\_\_ County Extension Council.

**Connection to County Government**

The \_\_\_\_\_\_\_\_\_\_ County Extension Council is a county governing body established in Missouri state law (Revised Statutes of Missouri Sections 262:550 to 262:620: County Extension Programs). The council is not considered by state law as a not-for-profit or charity organization. Missouri law states the basic three roles of the administrative body of the county are to provide for the health, safety and welfare of citizens. \_\_\_\_\_\_\_\_\_ County Extension assists in filling and supporting that role. MU Extension is the educator of choice by federal, state and national agencies because extension has offices across the state for in-place education, with joint partnerships and accessible programming for every citizen of the county.

**Mission**

The mission of the \_\_\_\_\_\_\_\_\_ County Extension Council is to govern operations of the local office, generate revenue, and give input on programs and county staff.

**Vision**

The vision of this Extension Council is to create an atmosphere in which MU Extension programming can flourish in \_\_\_\_\_\_\_\_County. (Describe here your council’s vision for extension programming in the county. What is your local program presence going to look like?)

University of Missouri Extension is a valued and trusted educational solution to improve the quality of life in Missouri, the nation and the world.

**Purpose**

The purpose of the \_\_\_\_\_\_\_\_\_\_\_County Extension Council is for members to cooperate in providing effective educational program support for county citizens by:

* Discussing issues of concern and need and making recommendations on issues of concern in the county
* Assisting the County Program Director (CPD) with council training
* Promoting and supporting county planning and programming according to state laws and administrative guidelines
* Fostering the partnership of University of Missouri Extension with other agencies and groups
* Supporting the policies and procedures of the Extension Council and following state laws; and
* Supporting funding for county office operations, \_\_\_\_\_\_\_\_\_\_ County Extension programs, governance and membership. (Do you see your purpose differently? Tell here what efforts you will take to fulfill the mission and produce a product.)

**Our clients**

**When Defining Clients we must ask ourselves- What is our Client base? Has it changed? Have we kept up with the changing client base? It is helpful to review county demographics to best understand what is happening to the population in your county.**

Who are your clients? Whom do you need/want to serve? What is your county program plan? Are government officials and employees among your clients? List/describe clients here.

**Collaborators/Duplicators/Competitors**

(This is where you explain the cooperative part of providing extension programming. Which groups in your county does your council work with to ensure that programming occurs? You may include a statement about others who provide programs but do not have MU Extension’s breadth, depth and mandate to provide research-based programs from a land-grant institution.)

MU Extension is the provider of choice -- the teaching arm -- for federal, state and county agencies.

**Strengths**

University of Missouri Extension provides \_\_\_\_\_\_\_\_\_\_ County with well-educated extension program specialists. We have the expertise and research-based knowledge necessary to succeed. Members of our county council are critical to making this philosophy work. Our council members are, in fact, our key competitive strength. (What is your competitive edge, and what makes people think about extension programming in your county?) MU Extension also provides research-based resources on the web 24/7.

**Meetings**

Providedates, time and location of meetings. Business hours of operation are important to share and include in this section. Let the public know how they can connect with the County Extension Council and provide input to your program planning and needs assessment. Describe how the council addresses programming by performing a local program review, thus ensuring programs are relevant and resource-supported.

**Products and Services**

**Pricing and fees:** We believe extension programming has real value, public and private, for our county residents. Our programs also have real costs. Some of those costs are supported by local funding dollars; however, these dollars do not fully fund county extension programming. The cost of a regional specialist’s salary is supported by state and federal funding of MU Extension. With all funds being reduced, we must look for other revenue generation streams. Grants and contracts provide some support but not all. Fees for programs must help fill this shortage. Fees should reflect the true cost of doing business. An extension specialist’s teaching time costs $50 an hour, including office overhead and expenses. For many programs, MU Extension seeks to recapture some program costs equal to $38 per hour for a specialist’s teaching time. Not every program will have a charge, but for sound business practices, we must take steps to maintain resources for programming.

**\_\_\_\_\_\_\_\_\_\_\_\_ County Extension can provide education services in these five general areas plus Continuing Education.**

**Agriculture and Natural Resources:** Agriculture and natural resources education provides citizens and businesses with 21st century tools to enhance profitability, strengthen communities and protect the environment. Key aspects of this program -- Livestock and forages -- are relevant in \_\_\_\_\_\_\_\_\_ County. This program area also includes Master Gardeners (Volunteers provide horticulture information and education to the public) and Master Naturalists (a program that engages Missourians in the stewardship of our state's natural resources).

**Business Development:** Business development education assists business start-ups, helps businesses remain competitive and prosperous, and creates more wealth for the community. Our specialists work with local Chambers of Commerce and Small Business and Technology Development Centers (SBTDC) across the state to help new and struggling businesses.

**Community Development**: Community development education helps citizens tap into local strengths and University resources to create communities for today and tomorrow. Programs such as the Community Emergency Management Program, Community Leadership, Healthy Lifestyles Initiative, and community decision support define community development efforts.

**4-H Youth Development:** Youth education connects parents and youth with the latest research and best practices to help young people gain leadership skills, build self-esteem and be valued, contributing members of our community in partnership with caring adults. We want to see 4-H continue to positively impact rural, suburban and urban youth in \_\_\_\_\_\_\_\_\_ County.

**Human Environmental Sciences**: HES education provides Missourians with research-based programs on health, nutrition, parenting, aging, divorce, personal finance, housing, consumer action and more. The nutrition program reaches large numbers of \_\_\_\_\_\_\_\_\_ County residents. The nutrition program is designed to assist residents with limited resources by teaching both youth and adults about healthy food choices and regular physical activity.

**Continuing Education:**

* **Nursing Outreach and Distance Education** – NODE keeps Missouri nurses up-to-date with the knowledge and skills they need to effectively provide care and fully participate in the state’s healthcare efforts.
* **Fire and Rescue Training Institute** - The goal is to provide fire services and emergency response registrants with continuing education and professional training to save lives and protect property from fire and other disasters.
* **MU Conference Office** - The office serves as a full-service planning and management center for educational experiences that help fulfill the University’s charge as a land-grant institution to disseminate information to Missourians. The office also provides expertise and service for noncredit programs, including on-campus events that draw high school and prospective Mizzou students and other visitors to Columbia.
* **Engineering Continuing Education** – The primary mission is to provide the engineering community with innovative educational programs that are built on the synergistic union of the College of Engineering and MU Extension.
* **Veterinary Medicine Extension and Continuing Education** - MU Extension’s veterinary medical program develops continuing education and outreach efforts in partnership with extension specialists, University faculty and researchers. Together, they bring large- and small-animal veterinarians and allied industries with livestock producers, companion animal owners and other members of the public.
* **Labor Education** - This unit works with employee organizations across Missouri and beyond to ensure that workers and their leaders develop the skills necessary to serve as contributing members in their organizations, as effective representatives in the workplace, and as informed and active participants in their communities.
* **Health Professions Continuing Education** – This unit provides educational programs that ultimately promote improved health for all patients. Efforts reach primary-care providers and other health-care practitioners across the state.
* **Missouri Training Institute** – MTI provides organizational and professional development assistance by reaching small businesses, industry, government agencies and educational organizations across the state.
* **Osher Lifelong Learning Institute**- Osher provides opportunities to individuals age 50 and up continuing intellectual and cultural stimulation, interpersonal interaction, group participation and the sense of being an active player in society.
* **Law Enforcement Training Institute** - The primary goal is to teach those who protect and serve all Missourians.

Additional information about how MU Extension serves your county should be included here. Which programs are provided in the county? What public and private value do they bring?

**Marketing Plan**

Marketing is defined in many different ways. Describe where and how you plan to reach the public with your programs and also how you will increase citizens’ knowledge of which extension programs your county offers.

Research points to this conclusion: Word-of-mouth is the single most effective marketing tool and strategy. Your council, in conjunction with University of Missouri Extension, needs to create tools that make word-of-mouth marketing and other marketing methods easier and more effective for council members, specialists andstaff. Tell what you are you going to do to increase citizens talking about extension in the county. Describeideas that will help grow the awareness of extension programming and services. As we learn about best practices of other councils, we will share and post on the web. In the meantime, regional directors, program directors and others in MU Extension can be a great resource. Additional resources are available on the web and in the Cooperative Media Group to assist you in marketing extension.

**Team Approach**

It takes a team, including council, faculty, employees and MU Extension administration to accomplish and fulfill the county’s plan. Describe how your team will work together here. Share the efforts of your program partners and describe how well the partnerships work.

**Operational Plan**

This is not simply about finances of the county council. It is also about defining the valuable assets you currently have in the county. This part of the plan describes how you will deliver programs and what you as a council will define as local program presence. Your county program review, program priorities, and specialists’ program plans should be considered in this area of comments.

Be sure to address issues about the funding levels you are receiving from the county commission, grants, contracts, fees and gifts**.**

**Location**

In addition to the address, talk about the visibility of the office location. Speak to sufficient office and program space. Does this office reflect a presence of professionalism? Consider adding what steps might be taken to improve your office space.

**Personnel/Number of employees /Volunteers/Other Resources**

You have many options here to talk about the people who make extension programming work in your county. Include not only those headquartered in your county, but also those serving from other counties and the campuses. Volunteers are a critical part of your business plan. Your statement should reflect citizens’ involvement and their commitment to public value.

**Pay structure**

If you haveadopted a policy and procedures manual, please refer to that here. There is a sample on the MU Extension website. The administrative assistant serving the county is paid hourly by the \_\_\_\_\_\_\_\_\_\_County Extension Council. MU Extension specialists serving the county are hired, trained and paid by University of Missouri Extension at no cost to the county.

**Tasks and policies**

The administrative assistant provides program support for specialists and help to clients. A County Extension Council policies and procedures manual is on file and was last updated in 20\_\_.

**Inventory**

A complete inventory of furniture, supplies and computer equipment is maintained by the \_\_\_\_\_\_\_\_ County Extension Council, filed with University of Missouri Extension, and updated annually**.** (Include the date of last completed inventory and audit.)

**Credit cards**

Currently, the office does/does not accept credit cards due to concerns about costs and labor requirements.

**Accounts payable**

We do not bill individuals and are a cash-only business. We will bill other extension councils for projects and costs or publications.

**Audits**

Council financial reports are reviewed monthly and audited annually. Members of the council conduct the audit using a checklist provided by professionals at University of Missouri Extension.

**Management and Organization**

The County Program Director (CPD) manages the daily business of the \_\_\_\_\_\_\_\_\_ County Extension Center. The Extension Council gives advice and sets policy in a number of areas related to the operation of the office and the programs offered in \_\_\_\_\_\_\_\_ County. Members of the \_\_\_\_\_\_\_\_\_\_\_ County Extension Council can be found on the local website: http://extension.missouri.edu/\_\_\_\_\_\_\_\_\_\_. Further development of our Extension Council members is an essential part of our success.

For the business plan to be successful, all specialists, staff and council members in \_\_\_\_\_\_\_\_\_\_County need to take an active role in promoting \_\_\_\_\_\_\_\_\_\_\_\_\_\_County Extension in their own social circles. Promoting something like MU Extension cannot be successfully done by one individual. This also will take a unified team approach using a clear message of what MU Extension can provide.

(It helps for each group to have defined roles of how you will reach the goal set for operational support.)

**Districting Option: (optional for including in plan)**

**Financial Development Plan**

**2017 county allocation:** $\_\_\_\_\_\_\_\_\_\_. **Full budget resource amount:\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Minimum objective required for operating an office that presents to citizens and stakeholders a professional operation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

There are four key parts to a council financial development plan – the current gifts and endowment situation, the vision for development, goals and action plans.

Here is one example from a real Missouri county to use as a springboard. Your council will want to develop a custom-tailored plan.

1. **Current situation:**

While we are very appreciative of having steady, consistent county funding in \_\_\_\_\_\_\_\_\_ County, county appropriations have not increased since 20\_\_ while our programming efforts have expanded to be even more relevant, reliable and responsive to the educational needs of people in \_\_\_\_\_\_\_\_\_ County. Our goal is to improve lives, communities and the county’s economy.

Extension faculty and staff raise approximately $10,000 in additional funds each year in grants, contracts and fee generation for the county council’s budget.

The \_\_\_\_\_\_\_\_\_\_ County Extension Council averages $500 per year in cash gifts. In addition, in-kind gifts of office supplies, postage stamps and volunteer office labor increases the resource base by $20,000.

The \_\_\_\_\_\_\_\_\_\_ County Extension Council has an endowment fund managed by the University of Missouri. On 12/31/12, there was $6,876.04 in the endowment fund and no balance in the spendable account.

Since 2007, the council has not given the endowment fund much attention and has not actively worked to grow the endowment. The council is appreciative that a council member contributed $500 in 2011 and $500 again in 2012 to the fund. Other than the two contributions and the proceeds going into the corpus, no additional deposits have been made into the endowment account.

The Extension Council feels it is time to focus more on gifts and endowment funds.

1. **Vision:**

Proceeds from the \_\_\_\_\_\_\_\_\_\_ County endowment dollars will be used to build a better \_\_\_\_\_\_\_\_\_ County Extension in terms of helping children and families develop or build on strengths. The endowment program is not about replacing current funding streams, but adding to these streams. The proceeds are not for sustaining \_\_\_\_\_\_ County Extension, but rather for making MU Extension in the county bigger, better and more effective.

1. **Goals set by the Extension Council (approved fall 2007):**
* The \_\_\_\_\_\_\_\_ County Extension Council directs that all money in the spendable account (earnings from the endowment\*) be deposited into the corpus until the corpus reaches at least $40,000.
* When the corpus reaches $40,000, the earnings may be used for programming to improve the quality of life for \_\_\_\_\_\_\_ County families and for positive youth development per the approval of the Extension Council in place at the time the funds are available to be used.

\*Endowments managed by the University will never see less than a 4.5% return in any year.

1. **Action plans:**

 ***Calendar years 2013-2014:***

* Appoint a development committee in March or April of each year.
* Council member or MU Extension faculty or professional staff present 10-20 minute program each quarter on development. Topics will be selected by the development committee and CPD in consultation with donor education and development staff.
* Include agenda item each quarter reviewing the balance of the endowment fund and gifts from the previous quarter, and brainstorm development opportunities.
* Increase gifts in Extension Council budget from $500 to $1,000 per year.
* Constantly work to let people know the door is open to giving:
	+ Subpage on website
	+ One sentence on appropriate newsletters, programs and publications
	+ Materials in the lobby of Extension office.
* Increase endowment balance $1,000 in 2013, $2,000 in 2014.

  ***Calendar years 2015-2017:***

* Increase endowment balance $5,000 per year in 2015, 2016 and 2017.
* Continue doing all the action plans from above.
* In 2017, plan an endowment campaign to get the endowment balance to a goal of $40,000.

 ***Calendar years 2018-2023:***

* Conduct active campaign in 2018 to reach the $40,000 goal.
* Conduct first programming, consistent with council goals above, funded in 2019.
* Continue to grow endowment at least 10% per year through 2023.

As your council begins to put development plans in place as a section of the business plan, here are some ideas for action plans (however don’t feel limited to these ideas):

 **Strategies for Success – Council education on some of the following topics:**

* Extension Development – for the second 100 years (overview of development)
* 7 great reasons to make a development plan
* When expenses are greater than income, there are only a few options
* Expanding the income base for your county extension council – exploring gifts, grants/contracts, endowments and fee generation
* Money looking for opportunities – how to prospect for foundation and other sources of program development dollars
* Understanding county endowment funds – how they work and FAQs
* Making a county development plan – goal setting for the future
* Finding donors – what research and best practices tell us
* Making charitable giving more deliberate – options for family financial plans
* It’s all about building trust – behaviors that build trust with donors and behaviors that tear down trust.
1. Quarterly council agenda item
	* Current balance in endowment and spendable accounts (if the county has an endowment). Request fund balances from Cat Comley.
	* Report on any cash or in-kind gifts for the quarter.
	* Brainstorm development opportunities, and review the county development plan.
2. Assertively work to make people aware that the door to giving is open in your county, which could include:
* One-sentence line on appropriate handouts, newsletters, programs and news releases
* Page on giving on your council’s website
* Information available in the Extension office lobby
* Article in the county annual report each year on development efforts and how to give
* Charitable giving presentations incorporated into appropriate seminars – e.g., Women in Ag, Estate Planning and Retirement Planning seminars
* Displays at the county fair, Century Farms event, Women in Ag conferences, at the courthouse, 4-H awards night and at other major events
* Donor education materials readily available when a teachable moment presents itself.
1. Plan a development drive focusing on gifts and/or endowment building. Focus on why people give, how to ask and how to nurture long-term development. Development drives can be rewarding in ways more than financial; however, make sure you have the resources in place, including person power, office support and money to fund the drive. This is no small commitment, but the rewards can be substantial!

High-quality materials can be provided for council use, or consider inviting Director of Development Cat Comley to collaborate on development effort.

Realize that development work is both a short-term and a long-term process.

**Proposed Timeline for Implementing Plan:** You may want to list these as stated below. Every journey begins with the first step in mind.

**First-tier items:**

**Second-tier items:**

**Third-tier items:**

**Items needed from MU Extension administration to support your county business plan:**

**Appendix**

**Enclose items that support the plan.**

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**Actual budget and projection needed for operational support of local program presences**

**2016 Budget 2017 Budget Request 2017 MU Guideline**

**Financial History of \_\_\_\_\_\_\_\_\_\_ County Extension**

**Specialists Programming in\_\_\_\_\_\_\_\_\_\_\_\_\_\_ County**

(List names and pictures of the specialists and paraprofessionals who serve the county.)