

Division of Extension – County Partnership Guidance

August 1, 2021

THANK YOU TO THE MANY COUNTY CONTRIBUTORS WHO MADE THIS DOCUMENT POSSIBLE!

Feedback was received and incorporated from the Wisconsin Counties Association (WCA) Executive Committee including representatives from Eau Claire, Fond du Lac, Marathon, Sauk, and Wood Counties, as well as other counties who expressed interest in reviewing the draft document including: Pierce, Marinette and Columbia Counties. UW-Madison Division of Extension appreciates the feedback received to develop this ‘living’ foundational document that will continue to evolve into the future.

OVERVIEW

The 100+ year partnership between UW-Madison Division of Extension (Extension) and counties has endured a great deal of change and our partnership continues to be crucial in providing educational services to the people of Wisconsin. Changes have occurred among both partners over the years. And, the codification of the partnership in state statute (Chapter 59), has not evolved with the changes.

The purpose of this document is to serve as a foundation that allows a new Extension committee member, county board member, or the general public an understanding of the benefits and responsibilities of the partnership between Extension and counties.

This document is not a legal contract. It was developed with input from the Wisconsin Counties Association Executive Committee which includes several county representatives to be broad enough such that each of the 72 counties can see themselves within the context of the partnership. The document is also not meant to prescribe specific details, such as how many support staff an office should have for example. There are certainly many factors that influence decisions like that, and in partnership, Extension is open to engage in those discussions to determine the best solution.

Moving forward, with this foundational document in place, the next step will be to form an advisory committee to assist with identifying topics that need further updates and clarification. Extension will work with the Wisconsin Counties Association (WCA) and the Wisconsin Extension Association (WEXA), affiliated with WCA, to establish a process to select advisory committee members. The committee will convene on an annual basis to strategize and focus attention on the partnership items that need clarification so the document can continue to grow and develop as we identify new topics to include and as our relationship evolves over time.

Our hope is this document continues to provide clarity between the relationship and how we can cooperatively partner to better serve the people of Wisconsin in the future. Together we can achieve more!

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Preamble

Change is inevitable, and over the past 100+ years, UW-Madison Division of Extension (Extension) and counties have evolved to continue to meet the ever changing educational needs of our local and statewide constituents. It is Extension's hope and aspiration to grow and evolve in concert with the counties.

Both county government and Extension have evolved since the authoring of Chapter 59.56, which captures the foundations of the relationship between Extension and counties in state statute.

Notable changes include:

- Since the late 1990's, Extension educators have been 100% state employees having one employer and a uniform benefits program, and not employees of both the county and the state as outlined in 59.56(3)(c);
- Some counties have combined Agriculture and Extension Committees with other county departmental committees, which varies from 59.56(3)(b);
- And, the focus of our shared educational work has evolved from what is listed in 59.56(3)(f) and has required that Extension education become more specialized and focused to meet the more complex local and state needs.

Additionally, there are many other elements of the Extension-County relationship that are not specifically codified in statute that have evolved over time.

We recognize the need to make sure our changes are evolving in partnership with counties. While we have been responsive to changing county needs, this is an optimal time to reconnect and strengthen the mutual understanding of our partnership. We have mutual interests and we both depend on our partnership to meet these needs. This document is focused on the nexus of this interdependence.

Together we will engage in discussions that create a common understanding among counties that partner with Extension to best address critical educational needs. We believe we mutually agree on many aspects of the relationship. We know we can strengthen the understanding around aspects that may be more complicated or have yet to be defined.

ANNUAL REVIEW PROCESS:

This foundational document was reviewed by the Wisconsin Counties Association Executive Team which includes several county representatives in March of 2021. Several other counties also offered input. The next step will be to form an advisory committee to assist with identifying topics that need further updates and clarification. Extension will work with the Wisconsin Counties Association (WCA) and Wisconsin Extension Association (WEXA), affiliated with WCA, to establish a process to select advisory committee members consisting of Extension committee members and other critical decision-makers such as a county board chair, coordinator, administrator, or executive. The committee will convene on an annual basis to strategize and focus attention on the partnership items that need clarification so the document

can continue to grow and develop as we identify new topics to include and as our relationship evolves over time.

Introduction

Extension has been part of the University of Wisconsin System since 1906 and hired its first county-based educator, E.L. Luther, in 1912 in Oneida County. Both Extension and Wisconsin counties have benefited from the strong partnership to provide an array of educational programs that continue to serve the people of Wisconsin wherever they live and work. Fundamental to our mission to fulfill the promise of the Wisconsin Idea, Extension extends the boundaries of the university to the boundaries of the state. We establish beneficial connections with all of our statewide stakeholders including our connection to UW-Madison and other UW campuses, and our partnerships with county and tribal governments, as well as with other public and private organizations. Our faculty and staff continue their impactful work across the state to enhance the quality of life for all Wisconsin residents. Our educators don't lecture or give grades in a typical classroom. Instead, we deliver education to people where they live and work – on farms, in schools, in community centers and other locations that are convenient for people both virtually and/or face-to-face. Extension educators also engage with civic groups and county boards, write newspaper columns, participate in radio and TV programs, facilitate meetings and build coalitions to solve complex, high priority community needs. Extension brings the research, knowledge and resources of the University of Wisconsin to your community.

Purpose and Scope of Guidance

With over 100+ years of a successful partnership between Extension and counties, we understand there is a benefit of clearly defining the roles and responsibilities of the partnership so we can mutually meet the needs of the residents across Wisconsin. More specifically we hope this document serves to:

- Describe the types of services and programs that Extension provides to the county, based upon the level of educational services that the county agrees to invest in;
- Describe the types of services and resources the county will provide to host an Extension office in their county;
- Standardize the processes, responsibilities, and lines of authority between Extension and the county

Extension Responsibilities

Role of the Area Extension Directors (AEDs)

Extension fully invests in Area Extension Directors (AEDs) who oversee an area comprising from one to five counties each (Area Map with Directors is on page 13 of this document). These administrative positions are responsible for partnership management, staff development, financial management and program coordination.

Through the many interactions the AED has with county partners and local educators, the AED develops a solid understanding of the local needs and county priorities and helps to align Extension educational programs to ensure the programs address county needs. Educators also communicate local needs to their programmatic Institutes which collectively identify opportunities to address statewide needs. Some additional primary duties of the AED include:

- They serve as the county Extension Department Budget Officer and Administrative Officer for the counties in their area. Specific signatory authority is agreed to by the county to allow the AED to serve in this capacity.
- They are the hiring authority of Extension staff and serve as the direct supervisor of Extension educators, conducting annual and mid-point performance evaluations with each Extension employee.
- They are responsible for the regular operations of county Extension offices and provide oversight to county staff within the office.
- They support educators and staff who direct Extension volunteers. They engage when volunteer behavior concerns expand beyond coaching or if dismissal of the volunteer is warranted.
- They monitor and manage risk and liability situations that might arise.

Roles of Extension Employees

Fundamental to our mission to fulfill the promise of the Wisconsin Idea, Extension extends the boundaries of the university to the boundaries of the state. We establish beneficial connections with all of our statewide stakeholders including our connection to UW-Madison and other UW campuses, and our partnerships with county and tribal governments, as well as with other public and private organizations.

Extension faculty and staff educators assess local and statewide needs to develop and deliver educational programs that transform the lives of people in communities, with emphasis on addressing the local needs of youth, families, government, agriculture, businesses and others. Educators bring research-based information backed by one of six academic disciplines housed within Extension.

Informational brochures that highlight the educational outreach of Extension and each institute are listed below. An embedded link will take you to the specific page:

- [Division of Extension overview](#)
- [Agriculture Institute](#)
- [Community Development Institute](#)
- [Health & Well-Being Institute](#)
- [Human Development & Relationships Institute](#)
- [Natural Resources Institute](#)
- [Positive Youth Development Institute](#)

Institutes not only serve as the programmatic home of Extension employees but also include expertise from faculty and staff integrated with UW-Madison and other UW-colleges. This provides access to cutting-edge research and knowledge around issues that matter to the people of Wisconsin. Educational programs that are hosted at the local level are based on sound research-based knowledge.

Educational services are broadly defined and include the work that is included in an annual work plan for a particular educator in a geographic location. Educators, as state employees, have both county and state responsibilities and expectations, including participating on teams and/or research activities that support programming that benefits audiences statewide as well as locally.

The county will be a partner in identifying key educational priorities for Wisconsin residents, and in collaboration with Extension leadership, counties will identify local educational priorities for their communities. Experience has demonstrated that local priorities often align well with statewide priorities.

Role of AEDs and Performance Evaluations

Employees hired by Extension as part of the 136 County Contract are employees of Extension. They are subject to Extension personnel rules, policies, and procedures. Faculty, academic staff and university staff follow the guidance and policy appropriate to their respective appointment in Extension.

The AED is responsible for performance evaluations of Extension academic staff and University staff working in the county. Faculty are reviewed by their Academic Department Chair or Section Chair of their department. The county Extension oversight committee is encouraged to provide performance feedback for all the county-based educators to the AED to consider when conducting their review. And, the oversight committee is encouraged to raise concerns as well, although performance remediation of Extension staff is confidential, similar to county staff performance.

In some cases, through negotiation with the county, additional staff such as area or regional outreach specialists may be housed in a county office if space is available. The county benefits by having that additional resource located in their county. Terms and conditions will be negotiated by the AED between the county and Extension in those cases.

Roles of Extension Volunteers

Extension benefits from and relies on nearly 11,000 volunteers who serve to increase the educational delivery of programs in counties across the state. Any individual who meets Extension's definition of a volunteer and completes all registration requirements is considered an Extension volunteer.

Volunteers are an essential component of Extension's outreach. Extension enhances its ability to impact the lives of people in all areas of Wisconsin through the efforts of volunteers. Since volunteers represent Extension while providing the service outlined in their volunteer agreement letters, they must abide by the rules, regulations, and policies set by the University of Wisconsin-Madison, Division of Extension, and the State of Wisconsin. These include, but are not limited to Extension's Volunteer Behavior Expectations. In addition, volunteers must comply with federal nondiscrimination laws and policies. All volunteers are accountable to Extension while volunteering in Extension programs.

In support of the volunteers, Extension provides management, oversight, training, liability insurance and other benefits for volunteers while working in the capacity as an Extension Volunteer. Both Extension employees and volunteers are covered by Extension liability insurance while working to accomplish Extension's mission.

Administrative Duties serving the county

The AED has the privilege of serving as the county Extension Department Budget Officer and Administrative Officer for the counties in their area. The AED is often viewed by the county as the office Department Head in the county. In most situations, counties provide AEDs a Delegation of Authority (DoA) to provide signatory authority for Extension related county accounts and business activities for the county Extension office. A DoA formally authorizes and codifies this role with the county. The DoA document can be updated at any time. In some counties, the signature authority is maintained with a county employee or other designee. The county is asked to confirm the amount of signature authority it authorizes to the AED as a means to fulfill many of the roles of managing the office budget. Because most AEDs serve multiple counties, the AED may partner with an office staff member to assist with the day-to-day management of the office.

Partnering with the county to identify educational priorities

Assessing current and future educational needs is an ongoing process that counties, AEDs, local educators, program managers, and Institute Directors consistently engage in. This is often done through a more formal needs-assessment process which is broadly distributed to solicit input. Results are shared with key stakeholders. In addition, needs-assessment also occurs informally through normal daily conversations and monitoring of local and statewide trends.

Extension educators are asked to annually update their work plans and goals that serve the identified needs of residents within their geographic area, and contributions to statewide teams and programs. Educators regularly share summaries of programmatic goals and updates with their respective Extension oversight committee. Oftentimes situations arise in a given year which may require an adjustment to their work plan. The Extension committee will be kept abreast of changes throughout the year as the AED and/or educators share updates about programming and accomplishments.

Extension utilizes a program recording system to capture the outcomes and impacts from educators. This data is used by AEDs to develop monthly and annual reports. Special reports can be developed as requested throughout the year. In many rural counties, educators provide a written or oral report to the committee as frequently as monthly. In other situations, reports may be quarterly or even annually. Extension Committees should engage with their AED to strategize on how we can best share the impact and programs that are delivered to the county stakeholders.

County Responsibilities

County Facilities

The county agrees to provide office space, meeting space, telephone, computer, network connections for email and other communications, software, and other general office supplies. Extension does not dictate the level of support necessary from the county, but would expect comparable support as other county departments; adjusted for size.

In many cases this includes:

- Office and educational meeting room space.
- Adequate supplies for office and educational programming needs.
- Access to computers, internet, and other necessary office and educational equipment.
- Adequate storage space for equipment, publications, program files.

Office support

Support staff provide a critical function within the county Extension office. They are typically the first person that members of the public interact with. They can quickly identify which educator or resource may be able to further answer the person's question. They also provide assistance for program material preparation, marketing and outreach of educational programming, data-base entry of participants and enrollment, mailings of newsletters and other critical roles that help support the efficiency and effectiveness of the office and the educator's work.

The county agrees to provide adequate local office support. Again, although Extension does not offer a formula for determining the number of support staff the county should invest in, a minimum level of staffing would include one support staff. We would ask the following minimum support be provided for each Extension office:

- Support the administrative needs of the office
- Meet the program support needs of the educators

Extension is beginning to explore and pilot new support staff models with some counties. For example, a support staff hired as an Extension employee on the 136 contract. These positions continue to be fully county-funded but this adds additional benefits:

- Eliminates the risk associated with an AED supervising a county support staff employee, especially through performance issues.
- The support staff member would have access to all the software licenses that educators have access to including Microsoft Office, Zoom, Qualtrics and other educational-related software resulting in a cost savings for the county and more uniformity with Extension staff.
- The support staff member directly utilizes all of the same processes and systems of Extension employees

Supervision of County Employees

County support staff typically function at a high capacity as part of an effective office Extension team. When performance is high, there are rarely challenges with an AED providing support

and guidance for county support staff. In recent years Extension has become increasingly aware of the potential risk and liability of having an AED supervise a county employee, especially through performance concerns. The county will need to ensure that performance reviews of county employees are managed appropriately in the partnership. Support staff are part of the office team, which is important for the effectiveness of the Extension office. However, while Extension can contribute feedback and input for performance evaluations of support staff, Extension needs to work in partnership with the county HR department on county staff performance reviews.

An AED **can serve as a supervisor of function** for county employees within the office, but **cannot serve as the supervisor of record**. This adds a level of risk and liability for Extension and the county. Performance and disciplinary actions with support staff must be, and are best led, by the county. Again, in most situations the AED benefits by the engagement of support staff as part of the team. It's in the rare cases of performance issues with a county employee that the AED cannot be their 'supervisor' during that process.

County Policy, Rules and Procedures

Similar to the guidance above regarding Extension staff and employees, any individuals who are employed by the county are county employees and are subject to applicable county personnel rules, policies and procedures. Likewise, any volunteer who works on behalf of the county to further the purposes of the county will be considered a volunteer of the county.

The county will be responsible for ensuring that its employees and volunteers take affirmative steps to make it clear that they are employees or volunteers of the county. And, similar to the protections afforded to employees and volunteers that work on behalf of Extension, the county shall be liable for the acts and omissions of its **employees** and **volunteers** while acting within the scope of their employment or volunteer role.

County Policy Impact on Extension

Counties, as well as Extension, have developed work-related policy. Extension staff housed in a local Extension office are users of county-based technology, facilities and may have other county-based services potentially including the use of a county purchasing card for business. County-based Extension staff will abide by policy that relates to privileges afforded by the county. This may include but is not limited to:

- Technology use
- Keys to access the building
- Driving authorization if using a county vehicle

Similarly, Extension also has work-related policy that all Extension staff are expected to follow. There may be an overlap of some programs, such as Sexual Harassment training, technology/cybersecurity training, drivers authorization (for personal vehicle which is the norm for most staff). Extension staff will accept responsibility for county policy as it applies to their roles.

County Extension Oversight Committee

Each county Extension department should have an Extension oversight committee for policy and decision making as described in state statute. In a majority of counties, a dedicated committee is assigned for the Extension department. In other cases, counties have a committee that oversees several departments including Extension. The oversight committees provide valued feedback to Extension on educational priorities and staffing decisions.

Committee business such as agenda creation and minute taking is a county government function and is the responsibility of the county. The county Extension oversight committee should take the lead role in developing their committee agendas and taking minutes during their meetings. If support is needed for taking minutes during the meeting, the committee chair should work with their county clerk to explore options, such as the use of the county support staff. AEDs will engage and partner with the committee on agenda creation, to highlight the work that Extension educators are conducting in the area and on budget development and approvals, etc.

The county Extension Oversight Committee is encouraged to provide feedback for all of their Extension educators to the AED. Ideally, feedback is provided as close to the time when the observation is made, rather than just prior to a performance review. That way the AED can share celebrations and address concerns as quickly as possible with the staff member. Performance remediation of Extension staff is confidential, similar to county staff performance.

Mutual Responsibilities

Budget responsibilities

Extension provides co-funding for most educator positions. Counties purchase Extension's educational services through the 136 County Contract ([136 County Contract template](#)). This contract is updated and authorized annually for the calendar year. If both partners have adequate resources, positions can be co-funded based upon an annually established fee for educational services in the 136 County Contract. Counties can also fully-fund additional positions if Extension does not have the resources to co-fund all, or part, of the position.

The 136 County Contract is established with a fee structure for educational service for a given year. Regardless of employee salary, the possibility for mid-year promotions, or other factors, counties benefit by knowing the annual cost of the contract for service for the year for co-funded positions.

The fee for educational service also leverages other services and resources of the University of Wisconsin - Madison. The educator can tap into the expertise of specialists, technology, and other resources to address local issues. In general, the more the county contributes through the 136 County Contract for educational services for positions, the greater the opportunity and benefit of leveraging resources since the educators bring connections with campus specialists and other resources.

The AED is responsible for developing the county contract with appropriate staffing and accurate costs, and building that into the departmental budget for county adoption. The AED works through the appropriate channels and approval processes to ensure the departmental budget is reviewed and adopted by the full county board according to the county timeline.

Both Extension and the county recognize the cost of doing business may increase from year to year. Extension will review the fee structure each year and may include a fee adjustment to account for anticipated or unanticipated adjustments in the costs of doing business. Factors that contribute to these increases over time may include state-mandated pay-plans, health care and benefits related costs, promotions and other factors that impact costs.

Per the county contract, counties agree to provide travel and appropriate job expenses. County travel budgets dictate how much travel can occur for an educator to meet the educational needs of county constituents.

Hiring and Managing Vacancies

When a position becomes vacant both Extension and the county will re-evaluate the need and the financial commitment to the position. Both partners need to review and approve their financial commitment and other decision points before approving the refilling of the position. If the county and Extension agree to continue to support the desired program and position, Extension will lead a hiring process with the AED as the hiring authority. Most positions, with the exception of FoodWise staff because they are fully federally grant-funded, the AED will seek input and engagement from the county throughout the hiring process.

State budget cuts over the years have reduced the number of Extension educator positions across the state. Extension does not have the resources to co-fund every position in every county across the state. As a necessary effort to provide service to more people, Extension is exploring developing more specialized positions within a program area and sharing the position across two or more counties. Most of the institutes have examples of this shared arrangement. The current strategy has been that counties pro-rate the cost of the position across the number of counties participating. Perhaps a future topic that the advisory committee can wrestle with in the future is to best determine what happens when a county cannot maintain their funding. That adds additional financial burden to the remaining counties, and could possibly lead to a shared-educator feeling insecure in their position and leaving.

The AED will work with Extension Human Resources and lead the interview process to ensure that EEO/AA and other policies are followed. Typically one or more members of the county Extension Education committee are involved with the final interview process. This does not exclude a county administrator or county HR director from participating in the hiring process.

Extension discourages counties from hiring county staff to serve as 'Extension like' educators in a county office. This has created significant challenges associated with supervision and direction as well as liability and insurance concerns. As referenced earlier, positions hired under the 136 County Contract, whether co-funded or fully county-funded, can leverage services and resources of Extension and the University of Wisconsin-Madison. These staff can tap into the expertise of specialists, technology, and other resources of the University to

address the local issues. County employees do not have the same level of access to those resources.

Although Extension cannot control what positions the county hires, the county will be responsible for ensuring that its employees (and volunteers) take affirmative steps to make it clear that they are employees or volunteers of the county.

Professional Development

Professional development shall be supported by both Extension and the county. The AED works closely with the educational staff to identify professional development needs. Professional development requested or required at the state level will be financially supported by Extension. Professional development that benefits the county (conferences, training, etc) should be supported with professional development funds associated with the county Extension department budget.

Educator's travel to Extension mandated meetings will be covered by Extension.

Nondiscrimination/Affirmative Action

The county and Extension will comply with all applicable state and federal laws and rules prohibiting unlawful discrimination. During the performance of work under this contract, Extension agrees not to discriminate against any employee or applicant for employment because of race, creed, ancestry, religion, color, sex, national origin, age, disability, arrest or conviction record, marital status, political affiliation, sexual orientation, or membership in the National Guard. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and, selection for training, including apprenticeship. Extension further agrees to take affirmative action to ensure equal employment opportunities.

Appendices

Our Purpose:


As a statewide engagement arm of UW–Madison, the Division of Extension embodies the Wisconsin Idea to extend university knowledge to every corner of the state. That mission started in 1912 with Extension’s first agent making farm visits and continues today along with community and business development, youth engagement, and well-being programming. Our statewide network of educators and specialists with UW–Madison and on UW campuses across Wisconsin is responding every day to emerging and longstanding hurdles residents are overcoming to compete and prosper. We’ve identified key opportunities to leverage local resources and leading research to affect change and improve lives.

Link to Organization Chart

<https://extension.wisc.edu/files/2019/06/extension-orgchart.pdf>

Link to Division of Extension Staff Directory

[Staff Directory](#)

Link to  Area Map w Director Names.pdf

136 County Contract template

https://drive.google.com/file/d/1P2wSdA3knibltYWBIr2aH_cBSoSKxjNL/view?usp=sharing