

Updated February 2023

Montana 4-H Policies & Procedures

SECTION 1

Introduction

This handbook contains the policies for the organization and administration of the Montana 4-H program. Policies and procedures in this document are designed to help County Extension agents and support staff comply with MSU Extension policies and procedures. Individual counties or reservation Extension agents, in accordance with Montana 4-H policies and procedures, may develop and implement additional policies and procedures. These policies may be 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

All programs and activities of the U.S. Department of Agriculture (USDA), Montana State University and the Montana State University Extension Service including the Extension 4-H program prohibit discrimination on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital and family status. 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, gender, religion, age, disability, political belief, sexual orientation, and marital and parental status. 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 “Youth Membership” and found in related project literature.

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 is or was discriminated against by the Extension 4-H youth program the right to file a grievance on grounds of discrimination. Complainants of discrimination, including harassment on the basis of race, color, national origin, gender, religion, age, disability, political belief, sexual orientation, and marital and parental status 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

The passage of the Smith-Lever Act in 1914 created the Cooperative Extension System at USDA and nationalized 4-H. The Cooperative Extension System is a partnership of the National Institute of Food and Agriculture (NIFA) within the U.S. Department of Agriculture (USDA), more than 100 land-grant universities and more than 3,000 county offices across the nation.

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. Authority for 4-H program policy is held by Extension personnel whether at the county or state level and is administered by the Director of Montana State University Extension. MSU Extension has the legal authority to determine the policies and procedures that will apply to 4-H activities. MSU Extension partners with the counties to provide the extension programs, including 4H, but MSU Extension is responsible for the program and the MSU employees working in 4-H.

The role of 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 skill development in youth. Extension personnel serve as educators, change agents, leaders, and program managers.

4-H Name and Emblem

All 4-H programs are authorized by the U.S Congress with the 4-H name and emblem 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 the national 4-H users guide for [4-H professionals](#) and for [non-4-H entities](#) for specific details.) Permission to start any 4-H program must be obtained from County Extension personnel responsible for 4-H in that county.

To be granted authorization for the use of the 4-H name and emblem, there must be some form of written agreement between an individual, organization, or group seeking authorization and the appropriate county or state level MSU Extension faculty or staff. The written agreement can be in the form of the 4-H club charter, letter, or other documents devised by responsible units through MSU Extension at the state or county levels and in agreement with policies established by National 4-H Headquarters. Any local requests requiring approval at the national level should go through the Montana 4-H Center Director who will forward them to the appropriate officials.

MSU Extension Agent Authority

The MSU County Extension Agent has the ultimate responsibility for and leadership of the 4-H program at the county level. 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, state, or locations outside the state of Montana.

MSU County Extension Agents provide leadership for the 4-H program at national, state, and county levels, by working cooperatively with parents and volunteer leaders and state staff. 4-H advisory committees, 4-H councils, leader associations and other organizations serve in an advisory capacity and give advice for 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. Groups or individuals refusing to follow state and/or county policies will be prohibited from operating under the 4-H name and emblem.

4-H has a direct link to 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 provide administrative leadership for the program in each county. These individuals ensure that 4-H programs are based on “best practices” and current positive youth development research.

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SECTION 2

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 strives to create environments for positive youth development using four key concepts including:

Belonging

1. A positive relationship with a caring adult
2. An inclusive environment
3. A safe environment

Mastery

4. Engagement in learning
5. Opportunity for mastery

Independence

6. Opportunity to see oneself as an active participant in the future
7. Opportunity for self-determination

Generosity

8. Opportunity to value and practice service for others

The “5 Cs” of Positive Youth Development

Through educational, learning-by-doing projects, club meetings, community service projects, events, and activities - young people and adults have the opportunity to develop the “5 Cs” of *Positive Youth Development**

Competence

Positive view of one’s actions in specific areas, including social, academic, cognitive, health, and vocational.

- Social competence refers to interpersonal skills (e.g., conflict resolution).
- Cognitive competence refers to cognitive abilities (e.g., decision making).
- Academic competence refers to school performance as shown, in part, by school grades, attendance, and test scores.
- Health competence involves using nutrition, exercise, and rest to keep oneself fit.
- Vocational competence involves work habits and explorations of career choices. Effective entrepreneurial skills may be one instance of vocational competence.

Confidence

An internal sense of overall positive self-worth and self-efficacy.

Connection

Positive bonds with people and institutions that are reflected in exchanges between the individual and his or her peers, family, school, and community and in which both parties contribute to the relationship.

Character

Respect for societal and cultural norms, possession of standards for correct behaviors, a sense of right and wrong (morality), and integrity.

Caring or Compassion

A sense of sympathy and empathy for others.

All result in the 6th “C” – Contribution

Contributions to self, family, community, and to the institutions of a civil society

**Lerner, R. M. (2004). Liberty: Thriving and civic engagement among America's youth. Thousand Oaks, CA: Sage Publications.*

The 4-H Emblem

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 four-fold development of youth in the 4-H program.

HEAD

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

HEART

Accepting the responsibilities of citizenship in local and global communities, showing concern for the welfare of others, identifying personal 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

Respect for societal and cultural norms, possession of standards for correct behaviors, a sense of right and wrong (morality), and integrity.

This four-fold development is vital to every individual. All four of the "H's" should be an important part of any goal youth 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 Center Values

The Montana 4-H Center for Youth Development, in providing statewide leadership to the Montana 4-H program, believes in the following:

County 4-H Programs – We are committed to responsiveness, support, education, and advocacy for the benefit of county and statewide programs.

Diversity – We believe youth and adults bring different values, backgrounds, and experiences to 4-H and can contribute and become involved in a meaningful way.

Inclusion – We believe all youth between the ages of 6 -19 have the right and potential to be a 4-H member through diverse delivery methods.

Positive Youth Development – We believe quality 4-H programs create an environment that addresses youth needs of belonging, generosity, independence and mastery.

Teamwork – We believe the Montana 4-H Center, Montana 4-H Foundation, and County Extension professionals are a cooperative team partnering with youth and adult volunteers to deliver the Montana 4-H program.

4-H Programmatic Values

4-H programming 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 understanding.

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 is 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 and 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 ends in themselves, but 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 focuses on science, engineering and technology, citizenship, leadership, and healthy living.
- 4-H uses a variety of delivery methods such as clubs, special interest groups, afterschool or school enrichment programs, camps, activities and events, satellite programs, or individual participation to engage young people in positive youth development settings. All delivery methods are legitimate forms of 4-H participation.
- By completing the enrollment procedure by the county deadline and having it recorded in the county office, a youth is considered a 4-H member and is eligible to take part in other 4-H programs providing they meet eligibility requirements and are members in good standing.
- 4-H relies on local determination of programs to fit specific needs of youth. 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. Ultimately, Montana State University Extension personnel are responsible for the leadership and conduct of the program. Requirements for affirmative action and state and national award and recognition programs are two areas where local determination must adhere to other standards.
- 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 providing 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. Groups or individuals refusing 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 and 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.

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SECTION 3

Program Organization

4-H is the youth education program of Montana State University Extension. Club membership is recognized as an optimal 4-H experience but there are also other ways youth can be involved in 4-H such as school enrichment, special interest, afterschool, camps, conferences, and individualized study. The official 4-H program year is October 1 through September 30.

Listed below are methods for enrolling in and delivering the 4-H program:

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 such as a horse club, or multi-project (community) clubs. In most cases, organized clubs have a constitution, by-laws, and a charter.

4-H Club members are expected to:

- Complete member enrollment 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 and/or county fundraising 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.
- 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 review.
- 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 and other appropriate committees.
- Follow club and county guidelines.

4-H club and project leaders are expected to:

- Complete a leader enrollment application, pass the volunteer screening procedures required of volunteers, and pay leader dues.
- Participate in leader trainings as available and appropriate.
- Hold educational meetings to help youth increase their knowledge and skills.
- Guide 4-Hers in the planning of their club program and projects.
- Build youth and adult partnerships.
- Provide appropriate supervision at club activities.
- Follow club and county guidelines.

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 Cloverbuds and other related groups.

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 in individual study, 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 according to the established county approval process.

A youth 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 young person 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 made on a non-discriminatory basis.)

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 these same policies and procedures.

Supporting Structure

4-H programs are more effective when there is a support structure. County Extension advisory committees, county 4-H councils, county 4-H foundations, statewide committees, and the Montana 4-H Foundation are designed to support the local 4-H program.

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.

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. 4-H Councils are advisory boards that provide support to 4-H staff and assist in determining the direction of the 4-H program for the county. The councils are bound by the policies and procedures of the 4-H program determined by MSU Extension.

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 Montana 4-H Program Policies and Procedures. 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 youth and 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.

The **Montana 4-H Foundation** is a non-profit, private corporation organized under the laws of the state of Montana. 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 also serves as the umbrella organization from which 4-H Councils, clubs, and other entities derive their tax-exempt status. The Foundation works closely with 4-H staff, leaders, and 4-H youth.

University faculty and staff lend expertise in subject matter areas through a cooperative effort with the 4-H Center for Youth Development.

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SECTION 4

Youth Membership

4-H membership is signified by completing the enrollment process or completing a group report form (for example - special interest, afterschool, school enrichment, camps).

Cloverbuds

Youth who turn 5 years of age on or before October 1 of the current 4-H year may join 4-H as a Cloverbud and enroll in the Cloverbud project. The 4-H Cloverbud curriculum is specially designed to meet the developmental needs and interests of these younger youth. Youth in this age group enroll ONLY in Cloverbuds. Although Cloverbuds participate in a wide variety of activities common in the 4-H program, it is neither the intent nor the objective of the 4-H Cloverbuds program to duplicate the 4-H members experiences designed for older youth. The 4-H Cloverbuds program is fundamentally different than general membership in 4-H and should focus on an introduction to 4-H with opportunities for fun and learning in informal settings. While counties are not required to offer a Cloverbud program, if they do, these programs MUST conform to state guidelines.

An enrollment must be completed for each Cloverbud member and enrolled Cloverbuds are counted as 4-H members on state and federal reports.

Listed below are the participation guidelines for involving Cloverbuds:

- Cloverbuds can attend camps but should never participate in overnight outings unless accompanied by a parent or caregiver in a special activity designed just for them.
- Cloverbuds can exhibit in a special “Cloverbuds” division at the fair, but these exhibits should not be evaluated competitively.
- Cloverbuds are not eligible to receive premium funds as a result of an exhibition.
- No live animals are allowed to be taken as a project or 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.
- Cloverbuds do not participate in long-term projects but have many experiences throughout the 4-H year.

For additional policies and guidelines, please refer to *4-H Cloverbuds: Agent and Volunteer Leader Guide (#5274)* available from Extension Publications.

Membership

Youth who are 8 years old on or before October 1 may join 4-H as a 4-H member and enroll in project(s) listed in the 4-H Clover except for Shooting Sports and some horse projects. To enroll in Shooting Sports, youth must be 10 on or before October 1. The Colt to Maturity and Green

Horse project require that youth be 11 on or before October 1 and meet other project requirements as stated in the project manual. Other project specific exceptions may occur. Therefore, families are encouraged to read project descriptions in the 4-H Clover Project Guide.

Youth who are 19 years old on or before October 1 are ineligible to re-enroll in 4-H unless still in high school.

Marriage and parenthood do not disqualify individuals from 4-H membership and participation, provided other membership requirements are met.

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 considered without extenuating circumstances and careful evaluation. Entire families should select the county they will participate in rather than having family members enrolled in two or more counties. Furthermore, a 4-H member cannot enroll in the same project in two counties at the same time. Bordering counties should determine guidelines for cross-county enrollment.

Members can 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 enroll in more than one county at a time, a project may need to be completed in another county because of changing family situations and/or custodial arrangements. 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. County agents in both counties should agree with the terms of the transfer.

Youth Conduct

Working with youth in the Montana Extension 4-H youth development program is a privilege and honor. Volunteers and Extension staff are expected to be positive role models. At the same time, youth are expected to abide by established rules of conduct for 4-H events, activities, and general membership. A youth “Code of Conduct” is available from the Montana 4-H web site (www.montana4h.org) which outlines specific expectations for participation. Counties may add additional expectations for situations such as camp, shooting sports, or other activities requiring them.

Upon signing the “Code of Conduct” youth agree to the following consequence for inappropriate behavior:

“I have read the above Code of Conduct and understand that my infraction of any of the above rules will be cause for my participation in the trip or event to be terminated and for me to be sent home at my own expense.”

This statement can apply to county programs, but it is important to remember that general expectations for participation and consequences for inappropriate behavior should be applied to all youth in the county program and not a select number of youth. Expectations for youth in leadership roles such as camp counselors, can have stricter guidelines but should be stated and

agreed upon before teens volunteer to serve in a specialized capacity.

Cases of inappropriate conduct will be handled on an individual basis. Leaders are encouraged to consult with county agents in extreme cases of inappropriate behavior where denial of participation is the desired consequence.

Montana 4-H reserves the right to deny any person the opportunity to participate in 4-H activities if their 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. Youth in leadership roles who are not serving as positive role models for other youth may also be asked to give up their leadership position. 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 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.

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SECTION 5

4-H Volunteer Management

Volunteers are the lifeblood of the Montana 4-H program and recognized as partners with MSU staff in offering quality experiences for youth. 4-H volunteers are essential to the Montana 4-H Youth Development program.

Most people who choose to work with youth are caring, responsible people who, at all times, have the needs and best interests of the youth in mind. They are members of caring communities that are significant in helping young people on their journey to competent and contributing adulthood.

Montana State University Extension continues to respond to the needs of 4-H youth by providing positive youth development experiences under the leadership of adult volunteers. MSU Extension must make sure that the process of selecting individuals to serve as volunteers adequately identifies, selects, trains, and supports those interested in volunteer leadership. It is clearly the responsibility of MSU Extension and the 4-H Program, including 4-H volunteers, to make best efforts to ensure that the youth who come to 4-H programs are treated with respect and dignity, and are provided with safe, caring environments in which to learn and have fun.

Extension staff members and volunteers have the potential to profoundly impact the well-being of 4-H youth members. In addition to providing safe, caring environments for youth, Extension staff and volunteers must also be positive role models. These individuals must focus on positive communication with 4-H youth, address challenges in a positive manner, and concentrate on the individual needs of all youth. The responsibility for the well-being of 4-H youth lies with all individuals involved in the 4-H program.

4-H volunteers serve at the pleasure of the County Extension agent and MSU Extension. Volunteering in Montana 4-H is a privilege and an honor, not a right. All adult volunteers must be approved by a MSU Extension Agent. In order to provide a safe and secure environment for the young people who participate in the program, 4-H volunteers that have direct contact with youth or handle funds must participate in a volunteer certification process.

1. 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 group or activity. Volunteers give time and expertise without receiving or expecting monetary compensation. Volunteers support the mission of 4-H and MSU Extension in providing quality positive youth development programs for youth and leadership opportunities and training for adults.

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 individuals under 19 years of age, may be 4-H members, and must be under the supervision of an adult. Adult volunteers ages 19-20 are not eligible to serve as chaperons for 4-H activities, events or trips or serve as shooting sports instructors (for any discipline).
3. MSU Extension Agents oversee and serve as the authority in the volunteer management program.
4. 4-H clubs and projects must be open to all youth and club leaders cannot discriminate against **anyone's** race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital and family status. This inclusion statement, included as part of the volunteer application, requires a signature by all volunteer leaders, indicating that they understand and will comply with this policy of inclusion.
5. 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.
6. 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.

Volunteer Definitions

Adult Volunteer

An adult volunteer is anyone, at least 19 years of age, who without salary/wage or expectation of salary/wage performs a task at the direction and on behalf of the agency. In some special cases, volunteers may receive a stipend for a specific service or program. Volunteers under 21 years of age cannot serve as chaperones for overnight events or as a certified shooting sports leader.

Youth Volunteer

Any young person under the age of 19 who is a participant volunteering for some 4-H responsibility. These individuals do not have sole responsibility for youth and are under the supervision of a certified volunteer or MSU Extension faculty member.

Certified Volunteers

A volunteer that has completed the Montana 4-H certification process and has received a letter of acceptance from MSU Extension. An individual who volunteers in a capacity that includes face-to-face direct contact with youth. Individuals serving in the following roles must become certified volunteers by completing the Montana 4-H Volunteer Certification process.

Volunteers may work directly with youth in 4-H clubs, manage county, district or state 4-H events and activities, work with youth in afterschool, special interest or school enrichment groups, and/or be involved in short term activities (for example, day camps, overnight camps, contests, etc.).

Volunteers may also work indirectly with youth as judges, council, and committee members or in other supporting roles such as transporting youth and serving as an exchange host.

Shooting sports leaders are required to complete a state 4-H shooting sports training before working with youth in any 4-H shooting sports project.

4-H Organizational Leader - 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 assist in providing leadership and citizenship opportunities for youth.

4-H Project Leader - An adult responsible for a given project area in the 4-H club or county. 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 - An adult, 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 and 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 serve in other 4-H leadership roles.

Chaperones – Adult volunteers (21 years or older) are needed to serve as chaperones for various events including events with overnight stay. Example of events include camp and state events like Congress and Rec Lab. Chaperones will communicate with the Event Coordinator on matters related to arrival, departure, lodging, healthcare, and any relevant emergency information. Inform county agents of any disciplinary matters or items of concern with youth or other adults. Coordinate plans with the County Extension Agent and assist as a chaperone for the entire county delegation in addition to the specific group assigned him/her.

Non-Certified Volunteers

These individuals do not have sole responsibility or direct contact with youth unless under the supervision of a certified volunteer or MSU Extension faculty member. It is the discretion of the County Extension Agent to determine if volunteers not having direct contact should participate in the volunteer certification process.

Episodic Volunteer - An individual who volunteers for a single or limited activity, event, or program. Examples include, but are not limited to, fair judges, members serving on special committees, assistants/helpers at 4-H events and guest speakers. Usually, these persons do not have an enrollment form on file but should have some kind of documentation of their service (letters, programs, fair books, etc.).

4-H Resource Volunteer - A special person or group of people including parents, relatives or friends who listen, question, and respond to children in helpful ways. 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.

Teen Leaders – Teens who assume the major responsibility for a project, activity, or 4-H club of younger members with adult assistance and guidance. Montana 4-H encourages the use and involvement of youth as volunteers and leaders. Teen Leaders are 13 years of age or older and should be enrolled in the Teen Leadership Project. These youth can be actively involved as leaders and should be viewed as assets to the 4-H program.

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 Ambassador - Youth selected or elected in each county 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.

Volunteer Certification Process

The Montana State University Extension Volunteer Certification process is designed to help carefully select and match appropriate individuals with the youth-related efforts that best meet the needs of everyone involved. In order to insure a fair and equitable procedure related to all volunteers and facilitate a safe environment for 4-H Youth, no volunteers will be grandfathered in – all current volunteers and new direct volunteer applicants must be certified through this process. Furthermore, volunteer or employment criminal background checks from other organizations or agencies will not be accepted in order to meet the criteria of the Montana 4-H Volunteer certification process.

The Montana 4-H Volunteer Certification process includes completion of:

- Montana 4-H Volunteer Application
 - Montana 4-H Volunteer Agreement

- Disclosure and Consent Form
- Media Release
- Complete and sign the MSU Employee Volunteer Agreement (if applicable).
- Criminal Background Check administered through Sterling Volunteers.
- Reference Checks (If required).
- Complete Montana 4-H Orientation training.

Once an individual has successfully cleared the certification process and been accepted as a volunteer, he/she will be considered a certified volunteer as long as no break in service occurs or he/she is not dismissed as a 4-H volunteer. All background check information received through the volunteer certification process is confidential and should be handled as such. Information, forms, and letters should be stored in the volunteer applicant's file when not in direct use by a County Extension faculty or staff member. These files should be secured and accessible only by County Extension faculty or staff.

Volunteer Re-enrollment

Volunteers must re-enroll every new 4-H year. The re-enrollment process includes the following.

- Review/edit volunteer enrollment information.
- Complete and sign the Montana 4-H Volunteer Personal Background form.
- Complete and sign the Montana 4-H Volunteer Agreement.
- Complete and sign media release.
- Complete and sign the MSU Employee Volunteer Agreement (if applicable).

County Extension faculty or staff will review all forms for completeness and review the Montana 4-H Volunteer Personal Background form for new information regarding the volunteer's self-disclosed personal background.

Volunteers with Break in Service

Volunteers will be re-screened if there is a break in service for one calendar year or more or if new information arises regarding their background. MSU Extension retains the right to screen a volunteer at any time during his/her service.

Volunteers Transferring Counties

If a volunteer who has successfully completed the certification process moves from one county to another within Montana, as long as there is no break in service that exceeds 30 days, the volunteer certification may be transferred without an additional criminal background check.

Transfer will not be complete until the new County Extension Office receives a copy of the following:

1. Volunteer Acceptance Letter provided by the County Extension Office that conducted the initial certification.
2. Transferred enrollment in the 4-H enrollment system.
3. New signed forms from the volunteer:
 - Montana 4-H Volunteer Agreement

- Montana 4-H Volunteer Personal Background

Volunteer Training Requirement

All volunteers must pass a 4-H volunteer orientation training as part of the certification process. This training may be completed online through the Montana 4-H enrollment system or as part of an in-person county workshop. Arrangements can be made for volunteers without internet access such as accessing the internet at the county Extension office or local library.

Reference Checks

Reference checks will be completed at the discretion of the County Extension Agent and the Montana 4-H Center. Reference checks are another piece of information that can be used in evaluating the acceptability of a volunteer applicant. New volunteers must provide three personal references that are not related to them. Reference check results are confidential and will be handled with the same care as volunteer applications.

Restrictions

The Montana 4-H center reserves the right to accept a volunteer applicant with restrictions. Volunteers accepted with restrictions must abide by the restrictions or face dismissal. Volunteers and the County Extension Agent will be notified of the restrictions by the Montana 4-H Center. Volunteers can request to have restrictions removed after ten years have passed from the offense.

Personal Background Misrepresentations

Volunteers found to have lied or omitted information on any of the personal background questions face dismissal.

Alternative Screening Policy

The basic standard of care is that the criminal background check will be completed through Sterling Volunteers. All efforts will be made to ensure personal information is safe and secure as outlined above.

If volunteer applicant is unwilling to provide information needed for background check, then an alternative fingerprinting method can be used with approval of the State Volunteer Specialist and/or Montana 4-H Center Director.

Volunteer Conduct

Working with youth in the MSU Extension 4-H youth development program is a privilege and honor. Volunteers and Extension staff are expected to be positive role models. At the same time, volunteers must abide by established rules of conduct for 4-H events and activities. As part of their service, volunteers sign a Montana 4-H Volunteer Agreement.

Montana 4-H and MSU Extension reserve 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. Volunteer corrective action or dismissal are treated as confidential matters and information is not shared beyond the parties involved.

Volunteer conduct must not pose a potential threat of injury to persons or property, substantially interfere with the orderly operation of the 4-H program or endanger the safety and security of others.

Volunteers who are not serving as positive role models for youth or who are under the influence of drugs or alcohol while serving as a volunteer may also be removed from their leader role.

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 are expected to conduct themselves as professionals in all interactions with 4-H members, families, staff, and anytime while representing Montana 4-H. This includes email correspondence as well as social media posts. Divisive, slanderous, or mean-spirited statements may be grounds for dismissal as a 4-H volunteer.

Volunteers are to avoid being alone with a single child before, during or after 4-H activities and events.

Volunteers should not fraternize with 4-H members under the age of 18 outside of Extension program activities.

No disciplinary action by a county agent toward a volunteer 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. Persons presented with corrective action or denied participation in 4-H activities will be provided confidential written notice of the reasons for the decision. The decision may be appealed according to the procedures outlined below.

APPEALS - Volunteer staff may appeal denial of participation or other disciplinary action by submitting a written request for reconsideration to the Director of the Montana 4-H Center for Youth Development within ten (10) calendar days of the receipt of the notice with a copy going to the county Extension agent. See section 10 for additional guidelines related to the grievance procedure. The decision of the Director of the 4-H Center for Youth Development shall be final.

Stipends and Payments

County 4-H councils can pay stipends on behalf of 4-H but, for insurance purposes, it is important that the volunteers are clearly identified as volunteers of MSU Extension.

Stipends should not exceed 20% of what an employee would be paid to provide the same services.

Stipends that exceed \$500 per year per person will remove coverage under the federal Volunteer Protection Act. Stipends are cumulative to include all payments within a year. Therefore, anyone receiving more than \$500 per year is not a volunteer and has to be employed through MSU as a temporary employee and pay into workman's comp and have taxes withheld. This process requires a basic job description but does not require a search. MSU Extension utilizes a temporary employee index to house the stipend provided by the county and makes payments through MSU Extension with workman's

compensation and taxes withheld. Reimbursed mileage, meals, and lodging expenses do you contribute to the \$500 limit.

Many livestock and horse judges paid over \$500 are considered independent contractors and carry their own insurances. If not, the temporary employee process will be followed. Judges being paid under \$500 sign an appointment form available from the Montana 4-H Center for Youth Development. Furthermore, anyone receiving \$600 or more requires a 1099.

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Montana 4-H Policies & Procedures

SECTION 6

4-H Projects, Curriculum, and Record Keeping

Montana 4-H intentionally designs and creates educational programs for youth as part of Montana State University Extension and the land-grant system.

Projects and Activities

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 the requirements and regulations, as well as 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 the requirements and regulations as well as resolving conflicts for local projects, activities, and events. 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 may be considered as having not completed their project.

Project Manuals

As an educational program, 4-H provides research-based, nonbiased project curriculum for youth to aid in their learning and growth. The approved 4-H curriculum must be used as the primary curriculum for the project, although supplemental resources may include research-based educational materials from other universities or educational organizations. Youth cannot participate in a 4-H project and be an active part of an organized project club without using reviewed 4-H curriculum to guide their learning experiences.

In the same way as project books guide the learning experiences, record keeping is also a required part of EVERY project. Record keeping is an integral and necessary part of every 4-H project and required as a part of the 4-H 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. Completion of record books may be used in selecting teens for leadership roles and/or participation in other events and activities.

Records are not to be judged for awards, nor placed using ribbons or other quality indicators. They should be reviewed only for completion. In the same way, project manuals SHOULD NOT be judged. It is important to focus on the skill of recording keeping and not how the records are kept.

Project Completion

Record keeping is a requirement of successful project completion. Each county should determine the minimum criteria for their county and share them with all members at the beginning of the 4-H year. Accommodations for youth with special needs may require a revision of these expectations on a case-by-case basis.

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Montana 4-H Policies & Procedures

SECTION 7

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 4-H accounts and request reviews or 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. This responsibility by MSU Extension for oversight of financial transactions gives the County Extension Agent the authority to remove club leaders or others responsible for handling 4-H funds based on evidence of misappropriation or mismanagement of funds.

4-H clubs or groups are public groups, open to all without regard to race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital and family status. Because 4-H is a public organization, it is not “owned” by individuals the way a company is owned - 4-H is owned by the public. Likewise, the club – not any one member, leader, or group owns money a club receives from dues and fund-raising events. Ultimately, 4-H club leaders are responsible for sound fiscal management and oversight of the funds in each of their clubs. Additional guidelines for agents and leaders are located on the National 4-H Headquarters website at www.national4hheadquarters.gov.

The Internal Revenue Service (IRS) recognizes the tax exemption status of 4-H clubs and affiliated 4-H entities 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” available on the Montana 4-H web site at www.montana4h.org under “Resources” and found in every county extension office. 4-H organizations eligible for federal income tax exemption must be chartered 4-H clubs and duly authorized affiliated 4-H organizations under the control of Cooperative Extension and officially recognized by the state 4-H program, 4-H National 4-H Headquarters, and the IRS.

The federal income tax exemption status for 4-H organizations is a privilege, but also carries a responsibility for openness and accountability. This 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. Whether a contribution is tax-deductible should be determined by the individual or business in consultation with a tax advisor and is not determined by the county extension program.

4-H Bank Accounts

Bank accounts must be under an Employer Identification Number (EIN) and not an individual’s social security number. It is recommended that MSU Extension Agents be listed on 4-H accounts as approved signatories in order to have access to bank records and be able to review or close bank accounts. The responsibility and authority of Extension Agents with regard to such 4-

H funds is limited to providing oversight and ensuring 4-H accounts are used to support the quality of the 4-H program. Extension Agents should not sign checks UNLESS there are compelling, extenuating circumstances that require this authority in unusual or extreme situations. If this is the case, the MSU Extension Agent must request a waiver from this policy from the Regional Department Head and document it in writing.

All bank statements, receipts, cancelled checks, checkbooks, savings account books, and the Montana 4-H Treasurer's Handbook (#5242) will be made available to the County Extension Agent or his/her designee who requests them for annual financial reviews. This policy has been formed to guarantee funds are reviewed regularly and appropriately by an independent committee appointed by the agent and/or County 4-H Council. The purpose is to ensure consistency in handling funds and accountability for the use of the funds.

The Annual Financial Summary Report, included in the Montana 4-H Treasurer's Handbook (#5242), and any other requested financial review forms must be turned in to the MSU County Extension office annually and be available at any time upon request by MSU Extension staff. 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 Financial Summary Report, required of all 4-H groups, is how MSU Extension-related 4-H clubs assist the university in fulfilling its obligation of fiscal accountability to the residents of Montana. These records must also be available for public inspection as per IRS regulation.

The Annual Summary Financial Report and any supporting documents are due to the MSU County Extension office at the completion of the 4-H year (September 30). A copy is kept on file in the county office and a summary spreadsheet of county 4-H accounts sent to the 4-H Center for Youth Development no later than January 15 of each year.

IRS 990 filings are an annual obligation of each 4-H group. The appropriate form to file is dependent on total gross receipts. As of 2021, an e-postcard is filed by groups with gross receipts of less than \$50,000 with those over \$50,000 filing a 990ez or 990. A tax professional should be consulted for advice regarding filing requirements. A copy of evidence of filing should be kept on file in the county extension office and sent to the 4-H Center for Youth Development immediately upon filing by the designated tax deadline.

Checks

Checks written for any 4-H purpose require two signatures and neither signature can be placed on the check before the payee or the amount is written.

Debit Cards

- Each club/group may only have one debit card in the club's/group's name.
- Only club/group assigned purchasers can use the debit card. The debit card cannot be passed around to non-assigned users.
- Assigned users must be updated as new officers and other positions within the 4-H entity change personnel.
- All purchases must be approved by the club/group and reflected in the minutes.

- The debit card holder is responsible and agrees to be held accountable to the county Extension office for all charges made to the debit card.
- For security purposes, do not e-mail the card number to any vendor. Online debit card payments must be made to a secure site.
- Original receipts must be submitted for account reconciliation and filed with account records.
- No cash advances, cash back with purchase, or ATM withdrawals can be made.
- A 4-H entities' debit card is for 4-H business only. There are to be absolutely no personal purchases even if there is an intent to reimburse the 4-H entity. If a personal purchase occurs within a club/group, the county MSU Extension agent or Montana 4-H Center personnel must be notified immediately.

Credit cards

Credit card use is prohibited by all 4-H clubs/groups and none shall be applied for, issued, or possessed in the name of 4-H.

Fundraising

4-H clubs may choose to finance their activities through their own fund-raising activities. Fundraising will be done for the good of the total group, consistent with the county 4-H fundraising policies and to support 4-H activities. 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 assist with participant costs in county, state, national, and international programs whenever possible. Soliciting funds from statewide businesses or organizations should be coordinated with the Montana 4-H Foundation. Fund solicitation by clubs should be kept to a minimum and undertaken only after consultation with the County Extension agent responsible for 4-H and the County 4-H Council. To maintain good will, repeated calls upon local supporters should be avoided.

4-H fundraising 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 the support the educational mission of 4-H. For any event or activity involving entry fees, raffle ticket sales, registration, etc., and where funds are collected, appropriate financial management practices will be followed. Detailed accounting for income and expenses following the steps outlined in the Montana 4-H Treasurer's Book is required. A financial report must be given to the county Extension agent within 60 days after the conclusion of the event. If such reports are not filed, an investigation will be conducted.

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, the revenue must be placed in an account to be used by the sponsoring club or 4-H entity. Contributions earmarked by a donor for a particular individual are treated, in effect, as a gift to the designated individual and are not deductible as charitable contributions.

Casino-like games of chance, lotteries, and betting activities involving money do not support the mission of 4-H and should not be engaged in.

Bingo

Bingo is allowed in 4-H but is considered gambling in the state of Montana and as such must be registered and approved through the State of Montana – Department of Justice: Gambling Control Division. State Gaming Office Guidelines must be followed.

Fifty-Fifty Fundraising

Montana 4-H does not condone nor support 50/50 type fund-raisers or raffles. These fund raisers are not to be conducted under the auspices of 4-H nor 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 and not as cash. Products should be of good quality and should represent the organization well. The cost of raffle tickets cannot be deducted by individuals as charitable contribution to 4-H as raffles are considered a form of gambling. For non-profit organizations like 4-H, there is no formal state permit required to conduct raffles. 4-H groups wanting to hold a raffle should check with their local County Commissioners' or Tribal Council office to comply with county/reservation requirements. Some officials will require an accounting of the raffles, while others will not. Be sure to ask if there are any regulations about 4-H youth (minors) selling raffle tickets. Neither non-profit nor for-profit groups can solicit outside the state, but they can go across county lines.

Handling Funds from Disbanded Clubs

Any 4-H club or group that disbands with money left in its account must turn those funds over 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 the money be used for specific 4-H programs within the club, county or state. This request, acted on by the county 4-H council in cooperation with the Extension agent responsible for 4-H Youth Programs at the time of club dissolution, should be documented. When a 4-H unit is disbanded, the Montana 4-H Center must be notified so that the EIN number can be cancelled for the group.

Handling Funds in Clubs That Split

If a club or group decides to divide itself (because it has become too large or meeting schedules do not work for all members), and is 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 dispersed to members on an individual basis.

If a portion of 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

A complaint made by 4-H members, leaders, or parents of any club about the disbursement of 4-H funds must be investigated by the MSU extension agent responsible for 4-H youth programs. Issues of this nature can be avoided if clubs have kept their books up-to-date and followed the financial policies and procedures as outlined in this document and the club Treasurer's book.

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 program development and implementation. Because it is a statewide event and the Montana 4-H Center for Youth Development is involved, the Montana 4-H Foundation has an obligation to provide support, if the event/activity is included in the Foundation budget. Both the Montana 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 will partner with a District, host County or statewide committee to conduct a statewide event/activity. This ensures more comprehensive planning for the program and considers the geographic challenges of the state.

- Any funds left from hosting a statewide 4-H event or activity should follow the guidelines listed below and dispersal of funds should be according to the outlined formula:
- This dispersal applies only if there is over \$50 left in the event/activity account. If the amount is less than \$50, the hosting entity may keep the funds.
- A budget showing expected income and expenses must be developed by the sponsoring group.
- A request for a budgeted amount 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 or 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 entities listed above.
- Any loans must be paid prior to distributing 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 event/activity 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. The 4-H Center Director, in consultation with staff, will make the decision as to how excess funds are spent.*

- *An event/activity may have a negative balance due to unexpected challenges. If approved, expenses will be paid by the Montana 4-H Foundation using the Event/Activity Account first and supplemented by general fund dollars.*

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Montana 4-H Policies & Procedures

SECTION 8

Guidelines for Sponsoring or Co-Sponsoring Events and Activities Under the 4-H Name and Emblem

The following criteria are guidelines for counties to use in authorizing 4-H events and activities where other organizations desire to use the 4-H name and emblem, membership, or staff in promoting, organizing, and conducting an event or activity.

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.
3. 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.
4. All official 4-H events and activities must provide appropriate adult supervision.
5. Only approved 4-H events may use the 4-H name and emblem in promoting the event. Written approval of the event and the approved 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.
6. The Extension agent must be informed of the official start date and end date.
7. 4-H participants in 4-H sponsored events can be covered by accident insurance if the county provides it. Youth who are not members of organized clubs should be included as a group enrollment and insurance purchased for the specific event.
8. For any event or activity for which funds are collected (for example, entry fees, registration, etc.), appropriate financial management practices must 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.
9. For official 4-H events for which funds were raised, and if revenue is generated from the event, those proceeds reside with the sponsoring club or 4-H entity. Funds are not to be divided 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.

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Montana 4-H Policies & Procedures

SECTION 9

Risk Management and Insurance

The Montana 4-H Center has a Montana 4-H Volunteer and Risk Management Guide to provide direction in controlling risk and protecting staff and participants. This guide is located on the Montana 4-H Website, www.montana4h.org. While risk cannot be completely eliminated from 4-H activities, prudence should be followed in planning, organizing, and conducting programs and activities. All staff and volunteers are expected to be familiar with and adhere to “best practices.” Some programs such as camp (see “Recommended Practices for Summer Camp” at www.montana4h.org) and shooting sports have specific recommendations while others follow general guidelines found in this and other documents in print and on the Montana 4-H web site.

Mailing Lists and Contact Information

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. State freedom of information or privacy regulations may apply to protect the credibility of these records. As such, consultation with MSU legal counsel through the 4-H Center Director and Director of Extension, in consultation with the Montana Attorney’s General, is recommended to handle access requests.

Accident Insurance

It is recommended that all 4-H clubs 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 assuming all responsibility for providing insurance.

Policies are available from a variety of companies, such as American Income Life (www.ailins.com). Some companies and policies will cover many 4-H activities. Others are for specific programs only.

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. Certificates of proof of coverage for 4-H programs (such as when private horse arenas or other meeting places are used) are available from the MSU Safety & Risk Management Office. More information is located in the Montana 4-H Volunteer and Risk Management Handbook.

Medical Authorization

A medical authorization form is required for each member and leader serving as a chaperone in order 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 and make themselves available to provide medical authorization in the event of an accident.

The following forms are available from the 4-H web site at www.montana4h.org:

- Health Statement and Medical Release Form for 4-H Youth and Adults
- Media Release Form
- Permission to Travel by Personally Owned Auto or, Permission to Travel with Others
- Permission and Assumption of Risk for Participation in 4-H Horse Projects
- Horse Helmet Policy and Acknowledgement of Education Form
- Permission and Assumption of Risk for Participation in 4-H Livestock Projects

Child Protection Guidelines

As a youth development program, Montana 4-H takes a firm stand that children are treated with respect and their safety is guaranteed while participating in our programs. In an effort to clarify the position of Montana 4-H on this critical issue, the following policies have been adopted for use in all counties.

Corporal Punishment

Montana 4-H, as a division of MSU Extension, abhors violence against children in all 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 for the offender 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 the 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. It is the policy of this organization that all volunteers who suspect child abuse or neglect is occurring will inform their county Extension agent and together make a report to the local Department of Public Health & Human Services.

Transportation

When MSU Extension employees organize transportation, the liability associated with that transportation belongs to MSU. It is recommended that 4-H members and families arrange for their own transportation to most events and MSU extension and leaders should NOT coordinate carpooling.

Private Cars

The State of Montana, MSU, or MSU Extension including 4-H provides no accident insurance coverage for personal vehicles. Liability insurance through the State of Montana self-insured plan is, however, in affect if a MSU Extension employee or certified volunteer are working with the role and scope of their duties in service to 4-H.

The Montana University System Board of Regents Policy prohibits the lease or rental of full-size passenger vans (those larger than 10 passengers, including the driver) for university related activities. See BOR Policy 1002.2. https://www.montana.edu/policy/vehicle_use.html

Buses

The use of school buses or other borrowed buses driven by paid or volunteer drivers is prohibited. The entity owning the bus seldom extends insurance to the borrowing organization. Due to the possibility of catastrophic accidents and liability claims, the State of Montana Risk Management & Tort Defense Division will not offer liability and physical damage insurance coverage for buses.

Contracting a bus from a charter bus company to provide the service and assume the risk resolves liability and insurance issues.

Updated February 2023

Montana 4-H Policies & Procedures

SECTION 10

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 or parties grieving the process or decision. The statement should include the following information:
 - The date of the incident.
 - The name(s) of the people filing the grievance.
 - A complete statement describing the incident including all facts upon which the complaint is based.
 - Any rules, regulations, policies, or procedures that have been violated, if any.
 - List of the names and addresses (preferably with phone numbers) of people who have been involved in the incident and their role.
 - Signatures of those submitting the grievance.

The grievance statement will be filed with the appropriate person(s), for example the County 4-H Grievance Committee or the County 4-H Council Executive Committee for a county level review and decision. Every effort will be made to maintain confidentiality and only the county agent, persons involved in the decision, or those with information relevant to the grievance need be made aware of the situation.

If all opportunities for resolution at the county level are exhausted without satisfaction, the grievance may be submitted to the Montana 4-H Center for Youth Development for review. The state 4-H grievance process is as follows:

2. A committee of 3-5 people will be appointed by the 4-H Center to:
 - Narrow and define the issues related to the incident.
 - Gather information related to the incident which may include identifying and obtaining input from people reviewing the documents.
 - Identify other processes deemed necessary by the committee.
 - 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.

Grievance documents received by the 4-H Center will be considered confidential information. Extension Staff, Councils or Committees who may receive copies will not share them without

the permission of the author and in consultation with the 4-H Center. The intent of the grievance may be summarized and shared but sensitive information or that which may cause harm to individuals will be protected. Recommendations returned to the aggrieved and the county may be similarly summarized with sensitive information remaining confidential.