

LOCAL POLICIES FOR EXTENSION EDUCATION

by

Melvin E. Nielson

Master's Problem

A Study

Submitted to the Graduate Committee

in

partial fulfillment of the requirements

for the degree of

Master of Science in Agricultural Education

at

Montana State College

Bozeman, Montana
March, 1955

TABLE OF CONTENTS

	Page
Part I.	
Introduction and Statement of Problem	3
Present Situation and Related Background	5
Method of Study	9
Limitations of Study	10
Review of Literature	10
Part II.	
Local Policy Development	14
The Mechanics of Policy Preparation	19
Figure 1. The Single Sheet Policy System	20
Initiation and Administration of Policy	21
Part III.	
A Sample Pattern for Local Policy	25
The Policy Outline	25
Outline For Local Extension Policy Development	26
Index and Sample Sheets of Local Policy	31
Policy Index	32
Policy F	33
Policy G	34
Listing General Sources of Policy	35
Publications Which Contain Policy Statements	35
Bibliography	38

PART I

LOCAL POLICIES FOR EXTENSION EDUCATION

Introduction and Statement of Problem: This study is concerned with the development of a local policy for cooperative Extension Education at the county level. Montana County Extension Agents are working under the direction of policy which is of federal, state, and related county nature. Few, if any, agents have a written local county policy statement. There is a need for a written statement of local policy. Boards of Education realize the values of having policy statements. These groups have done a great deal of the pioneering development of this idea.

The primary purpose of Cooperative Extension work is educational service to the people. The general areas in which work has been emphasized are agriculture, home economics, and youth work. Agents have used an annual program of work for years to help them direct their efforts. The program of work is a work plan and must not be confused with policy which is a set of guiding principles which directs the work to be done. Agents have come to realize that in many cases their duties are not clearly defined and their efforts are accompanied with some frustrated feeling. One reason for this may be that a written policy has not been developed which would tell them what they should be doing such as executing a program or acting as an "organizational-chore boy".

The problem stated: How can a local written policy be developed which will support the objectives of the entire Extension Education program and give authority to the directed efforts of the workers?

It is easier to understand the need for local policy if a person knows what policy is and that its values are demonstrated by the purpose it serves.

Policy shall be defined herein for our purposes as: A mutually agreed upon stated course of action pursued consistently over a period of time, adopted and followed by an organization or individual. Some of the attributes of sound policy are:

1. It is clearly concerned with the problem area.
2. There will be a contribution to the organization objectives without conflicting with other policy; nor will it conflict with itself.
3. It adheres to democratic standards.
4. Its development is based on the facts contributing to the situation.
5. It is within the bounds of law.
6. It is developed by those affected or influenced by it, this includes the policy administrators.
7. The obligation of publication will be adhered to.
8. It shall be of such a nature that it can be practically followed.
9. It must be changeable from time to time as the need occurs.
10. It shall be written in a clear concise manner, so that it is easily understood, and set up so that it is easily followed and used.

PRESENT SITUATION AND RELATED BACKGROUND

The County Extension Agent works in an unique type of environment. If an individual knows what this situation is, and what the contributing factors are, he can better understand what some of the problems will be in regard to policy development.

High on the list for consideration as related background criterion is the human element involved. Individual differences such as age, tenure, degree of success, potential abilities, academic preparation, experience, and present position activities will influence the degree of confidence the people will have in the agent. Then the peoples' confidence and public relations are handmates in program execution.

Many of the more experienced agents now in the field may not feel a need for a local policy statement. A justifiable debate could easily be brought out for running a county program without any more "rules or regulations". This is a true statement only if it is realized that the agent already has a local policy.

Agents have a policy: While agents may not have a local policy set down on paper, they do have a local policy. The agent may not be totally aware of this local policy as it is often very hazy and may be in part oral or assumed. Local written policy can be found in commissioner meeting proceedings or in local organization meeting minutes. The above type of local policy is:

1. Often intangible.
2. Very flexible (can be a strength or a weakness).
3. Hard to find and pin down.

4. Easily forgotten and ignored. ^{1/}
5. Handed down from agent to agent and has never been accepted by anyone.

The point in question is not necessarily a need for more regulatory policy and procedure, but a recording of the present assumed oral or fragmentary written policy.

A person's experience and policy background is a lot broader than he may realize. Policy can be likened to a contract in many respects. Both often stipulate many detailed rights, privileges, and obligations. Many of the organizations that the agent belongs to, and to which he often serves as secretary, have a set of Constitution and By-Laws. A great deal of policy is represented under this type of heading.

Everyone is involved in, and influenced by policy every day to some degree. This is especially true of every living member of society making a living in that society. This is true irregardless of what a person does to make a living. The country's governing laws represent policy as does the company's policy. ^{2/}

The idea of policy use is not a new one, nor is the use of written policy a new innovation. It has been used for years by industry to good advantage. Development of local written policy in education does not have the advantage of experience enjoyed by industries efficient policy making machine. A good place to start would be in the recording and the publication

^{1/} Franzen, Carl B., "Board Policies - They Need Not Be Complicated", American School Board Journal, 124:34, March, 1952.

^{2/} Ibid.

of present existing policies. The "how" of this project will be discussed in the Report of Study.

Procedure: Policy as an instrument of administration is not complete unless it is accompanied by its helpmate - procedure. Policy states - what shall be done and procedure states - how it shall be done. This distinction should be made so there can be no possible confusion with a program of work. Policy is an administrative instrument, the program of work referred to in the language of the Extension Worker is a planning device stating a course of action to be followed in his work areas.

The value of policy: If we now have a common understanding of what policy is, how it is formed, and what it does, it is possible to approach the question - What can a local policy statement do for an agent in a county position? A County Extension Agent is guided by laws and organization regulations, policy, and ethics. Policy serves as a guide to the agent in the following ways:

1. Public relations-wise by strengthening Extension program in the county.
2. By authorizing agents to take some specific course of action in program execution.
3. By helping Extension agent explain to people what his duties and policies are.
4. By supporting the local Extension program with sound principles of direction.
5. By acting as a "position-protector" on some stand that an agent has to take. It takes the "heat" off from the agent if he can

explain that he is following a course of action decided upon by many representatives of the community, rather than following his own decisions. ^{1/}

An example illustrating this point could well be one of county control. Suppose that the County Board of Commissioners, upon the request of the County Ag Planning Committee, decide to furnish farmers with weedicides for the treatment of one or two particular types of noxious weeds, leafy spurge for instance. The farmer is to make application of this weed killer to spurge patches on his own land and the patches found on adjoining county right-of-way. This is fine for the farmers with leafy spurge problems, but it makes no provision for those people living in town who have similar weed problems. The crux of the matter is that these towns people pay county taxes too. Whose decision is it? The agent may do a more effective job of explanation if he can reach into his desk and pull out his policy manual and show his visitor the written policy governing this type of action and his decisions in administration procedure.

6. As a help to indoctrinate new personnel. ^{2/}

^{1/} Tuttle, Edward M., "National Association Finds Growing Interest in Written Policies for Boards of Education", American School Board Journal, 124:5, 1952.

^{2/} Ibid.

7. By making people aware of policies that need revision to be brought up-to-date.
8. By furnishing a framework upon which other sound policy may be built. Many will agree that it is difficult to build something on nothing.
9. By eliminating confusion, misunderstanding and hard feelings through inconsistency.

METHOD OF STUDY

The method of study for this writing on the development of local policies of Extension education has included the following:

1. A review of available library material and Extension policy manuals.
2. Problem outline developed for use in writing.
3. Problem development conferences with Agricultural Education staff members and Agricultural Economic staff members.
4. Interviews with College Extension staff members and County Extension personnel.

Notes taken from the interview and problem development conferences along with experience recall comprises the majority of the study source material. People who were interviewed on policy matters showed a definite interest in the idea and offered many concrete suggestions. For these, this note of appreciation is expressed to:

Dr. Leo L. Knuti, Agricultural Education Teacher Trainer
Mr. H. E. Rodeberg, Agricultural Education Teacher Trainer

Mr. N. E. Beers, Director Montana Extension Service
Mr. William Stucky, County Agent Supervisor
Mr. Bruce L. Brooks, Montana Extension Marketing Specialist
Miss Bess McClelland, Extension Home Demonstration Leader
Mr. Maurice Taylor, Associate Professor, Agricultural
Economics Department
Mr. Robert Bucher, Teton County Extension Agent
Dr. Chet Baker, Assoc. Professor Agricultural Economics Dept.
Mr. C. W. Vaughn, Lewis and Clark County Extension Agent
Mr. Owen Wirak, Gallatin County Extension Agent
Miss Frieda Schroeder, Teton County Home Demonstration Agent

LIMITATIONS OF THE STUDY

This study is designed to explain the present local County Extension policy situation, to express a need for this type of policy, and to develop a method for formulating policy on the local level. This is attempted by furnishing comprehensive writings, citations, and examples. This includes a suggested policy outline and sample policy sheets.

REVIEW OF LITERATURE

There is lack of literature regarding local policy development for Extension education. The predominant source of literature was related to policies developed by school boards and administrators for local school systems. The main source of Extension policy literature reviewed was the Montana Extension Service Manual of Policy. This manual includes writings of federal, state, and related county nature. The following is a review of the literature referred to above.

Hardesty ^{1/} states that one of the functions of the school board is to serve as a policy making body and to allow policy to be effective through competent administration.

Tuttle ^{2/} points out the usefulness of policy which can be used to indoctrinate new board members and administrators. A two way job of education is needed in the area of policy and procedure. It is much easier to avoid misunderstanding and confusion by having defined responsibility and authority.

Tuttle ^{3/} also says no group can make wise policy unless they know what is to be accomplished. This indicates that constant study is a necessity.

Written policy allows confidence in action with no infringing on the rights of others.

It can result in positive progress of education according to Gilbaugh.^{4/}

^{1/} Hardesty, Cecil D., "Some Obligations of the Board of Trustees and Superintendent of Schools", American School Board Journal, 124:35, April, 1952.

^{2/} Tuttle, Edward M., "National Association Finds Growing Interest in Written Policies for Boards of Education", American School Board Journal, 124:5,6,8., June, 1952.

^{3/} Tuttle, Edward M., "The Unique Functions of School Boards", School Executive, 71:19-22, March, 1952.

^{4/} Gilbaugh, John W., "Board Policies and Regulations are in Writing at Humboldt", American School Board Journal, 124:53, June, 1952.

Miller ^{1/} says board policy may improve staff moral because it is consistent and saves a lot of administrative time. It may also become static due to the lack of revision or it may lack the necessary degree of flexibility.

Godwin ^{2/} states that the important single decision of any policy formulating group is to get these guiding principles down in writing. These writings should be done with care so that they will not be changed under pressure. Policy then becomes a public record and is binding upon the whole board.

Many would probably ask how could a policy benefit any educational institution. Part of the answer would lie in the fact that policy would act as a stem against a rising tide of criticism if it is made public what the basic policy is. This basic policy is to be determined by all the people through their elected representatives. This adheres to the right of all citizens to help make policy. The profession of teaching then does not assume the right of determining the policy of social change, according to Woodring. ^{3/}

^{1/} Miller, B., "Boards of Education and Personnel", American School Board Journal, 126:34, April, 1953.

^{2/} Godwin, W. R., "Our School Board is Tops", Journal of the National Education Association, 40:191, March, 1951.

^{3/} Woodring, Paul, "An Open Letter to Teachers", Harper's Magazine, 205:28-31, July, 1952.

Jones ^{1/} states that no policy should be decided upon until it is known what the desires of the community are. There should be a clear cut delineation of the duties of the formulating group and the administrators of the policy. Administrators should definitely be given the right to execute policy after it has been determined. It should be definitely understood that good policy will contain a list of rights of those concerned.

Hamlin ^{2/} says that the finest educational program planning available is developed and executed only within the framework of policy. This means that without policy to give a program direction teachers may carry on indefinitely with their present program or introduce their new features via the back door. Programs may tell what and how something is going to be done, but policy is the initiating authority.

Smith ^{3/} mentions that the purpose for the written official policies was to clarify thinking and to make operation and administration more efficient in the two agriculture departments of the district.

^{1/} Jones, Howard P., "A Bill of Rights for School Administrators", Education Digest, 18:34-37, October, 1952.

^{2/} Hamlin, Herbert M., "Program Planning is Not Enough", Local Policies For Agricultural Education in the Public Schools, pp. 15, 1952.

^{3/} Smith, James T., Policies for Agriculture Education in the Public Schools, pp. 15, 1952.

PART II

LOCAL POLICY DEVELOPMENT

This section deals with the development, mechanics of policy preparation, and the initiation and administration of policy.

Policy defined: Policy is a mutually agreed upon stated course of action, pursued consistently over a period of time, adopted and followed by an organization or individual. Some of the attributes of sound policy have been listed. These attributes should be reviewed and become guide standards in policy formulation.

Determining Policy: The people who are affected and influenced by policy should help develop it. Those who have administrative responsibilities, as well as executive duties, are involved. The people who will be affected by the policy should sit in and assist in the meetings or be represented there as by local leaders. All those concerned can participate in formulating the local Extension policy, such as local 4-H club leaders or Home Demonstration council members.

It should be clearly understood that the policy to be developed here is for a county. The policy that the agent is now familiar with and working under is of federal, state and related county nature. The county policy shall be designed to work at the local level and be in accord with the existing state and federal policies.

The people who may logically take the most active role, however, will be:

1. The County Extension Agents
2. The County Board of Commissioners
3. The County Agricultural Advisory Committee
4. The County Home Demonstration Council
5. The County 4-H Council

The proposal of how this job of development might be undertaken would involve getting these people together for this specific purpose. A meeting should not be called, however, until it is known by those presiding what is actually to be accomplished. The objective that this instrument is to serve should be clearly set forth and made public.

Policy Objective: The objective of the written policy should be for the betterment of the education program. ^{1/} In this case, it is the County Extension Education program. This policy should not be confused with the program of work nor should it become the agent's "bible". There is less chance for confusion if it is known that policy is essentially the foundation that gives direction to work, while the program of work is a work plan. The two are inseparable tools in education programming, however.

How to proceed: How should the agent proceed? It will probably be on the County Extension Agent's initiative that the organizational machinery will be set in motion. He would do well to make known to the key people in his county, who will be working with him on this project, what his intentions and objectives are. His outlined program for accomplishment

^{1/} Tuttle, Edward M., "National Association Finds Growing Interest in Written Policies for Boards of Education". American School Board Journal, 124:5, June, 1952.

should include the tabulation of the oral or assumed policy now in existence. Also, there should be gathered together and consolidated into one writing the aggregates of the current policy found in the minutes and by-laws of various organizations. When this is done, there is a base upon which to build supplemental guides.

Record present policies: Recording existing policies will produce material that County Extension Agents may not have known existed. The policy aggregates that will be found may come from county commissioner meeting minutes. Other possibilities are the County Home Demonstration Council Constitution and By-Laws and meeting minutes as well as the minutes of the County Agricultural Advisory Committee meetings. There will be other sources that he will be familiar with which are peculiar to his own situation. After this existing policy has been brought together and put into one composite, it would be possible to hold a meeting for its correction and adoption. Included in the job of policy recording would be the listing of policy sources. ^{1/}

Developing new policy: There are various ways that new policy can be developed. One practical method for developing policy would be to let it evolve out of needs. This method makes for ease of adoption. Notes should be taken on policy needs and kept in a folder until the policy meeting convenes. Also, notes on changes that may be necessary should be kept in the same fashion. The recall of existing policy may be a time

^{1/} Refer to the list of Publications which contain Policy Statements in Part III of this writing.

consuming task; this is the reason for the above suggestion. Notes may also be kept as an aid for recalling existing guides.

It should be recognized that in many cases one organization will be the representative group concerned with policy on various matters. An example of this would be a policy on 4-H enrollment in regard to project completion. Obviously the group concerned here is the County 4-H Council. The decisions they reach in a meeting must be written into the minutes. If this decision is to be a policy it should be so stated. This statement can then be transferred to the policy manual.

A second method that might be used would allow the agents to draw up tentative policies that are needed in related areas. These could be presented to the policy making body for correction and approval.

A third method that could be employed is to have a policy committee organized from the group concerned with policy formulation. The committee could meet with the County Extension Agent and draw up tentative supplementary policy in areas not covered by the current policies. These could then be presented before the policy making body in a meeting for correction and adoption.

The question of when the policy meeting should be held has not yet been discussed. Since policy and program planning cannot be completely divorced, it would be feasible to hold these sessions at the same time, or at times not too far apart. The advantage here is that many of the people participating in these two activities will be the same ones. They will know that in many cases sound policy has to be the underlying support to the program.

Local policy should not be developed and adopted without the best wishes of higher cooperative Extension state and federal administration. The reason for this is that all policy must be consistent and non-contradictory. It would seem advisable to invite a State Extension Supervisor to these meetings, when it is possible for him to attend. He could then act in an advisory capacity and in many cases eliminate problems of conflict, because of his knowledge of existing Extension policy. This would be especially true in the event that the policy is not strictly local in nature.

Systematic development and revision: A system should be devised for the specific purpose of policy making. The reason for this is that policy development is a slow process at best. Good policy development takes time and plans should be made to have an annual policy meeting. It would be possible to correct and adopt new policy as well as to revise the old at this meeting. A great deal of time and effort could be saved at this annual session if the committee will first do a thorough job of preliminary preparation of new policy and review of existing policy.

It is important to note that policy changes will be necessary from time to time. It is desirable to develop and write policy that will be as permanent in nature as possible. The soundness of the policy is largely dependent on its permanent qualities. The annual program of work should be subject to improvement from revision more often. A work plan has its standard or more permanent properties also, but without constant review and planned improvement it soon loses its effectiveness through stagnation.

THE MECHANICS OF POLICY PREPARATION

The best organizational procedures in policy formulation will be of little value if there is no system for writing policy, nor will the soundest policies be of any use unless they can be expressed in writing. Interpretation and usability will be governed by the efficiency of the recording system used.

There are some basic writing rules that should be adhered to. Some of these are:

1. Avoid complicated statements - keep them simple.
2. Do not allow them to become involved and conflicting.
3. Use a simple method of drafting.
4. Keep policies current.

The policy manual: One system that has been used with success by many industries and which is presently being used by the Montana Extension Service, is the loose leaf policy and procedure book. This is especially handy as it allows the revision or addition without the destruction of the complete book.

The manual could be made up of two main parts titled: Policy and Procedure. Policy is the guide that tells what to do, and Procedure will outline how to do it. These shall be incorporated into one writing for our purpose and headed policy. The writing shall be complete enough to include procedure.

When a policy is drawn, it should deal with only one topic. This makes for simple usability. In preparation each policy is written on

separate sheets insofar as possible. This allows for the development of the policy in a gradual way as needed, and the new policy sheets can then be coded and inserted into the book. Policy can be modified and new sheets can be inserted when necessary changes occur.

An index sheet is needed to make it possible to find the various policies. This index table should list the exact topic covered. In this manner it would be possible to find and scan the policy section wanted for an answer on "what to do" and "how to do it" according to our devised system. The policies should be numbered with the number of the policy and not the page. This allows the numbering to be permanent and the insertion of new sheets without disrupting the system of the book. It is best to make the policies concise and to put only one policy on a page. ^{1/}

The following figure illustrates how the policy is set up according to the index and single policy sheet system. These sheets are for loose leaf notebook use.



Figure 1. The Single Sheet Policy System

^{1/} Franzen, Carl B., "Board Policies - They Need Not Be Complicated", American School Board Journal, 124:34, March, 1952.

INITIATION AND ADMINISTRATION OF POLICY

Who initiates policy: The initiation function referred to here deals with the question: who decides, or how is it determined that policy is needed in some specific area? The answer lies in needs. Policy should not be made for the sake of writing something, but must meet a need in every instance. Those who are concerned with and are working in a problem area, can often anticipate these needs before problems arise. If these needs are not anticipated and satisfied ahead of time, it shall still be possible to develop the necessary guide. This is the function of the policy making machinery which should be set up for this purpose.

The alert agents will be able to recognize administrative needs and can help their committee by drafting tentative guides for their inspection and approval. Provision should be made for the use of these tentative guides until they can be formally corrected and adopted by the committee at the annual meeting. Without a provision of this nature, a full year might elapse before some needed policy could be used.

It has been mentioned that opportunities to write local policy will often present themselves in meetings of the various activity organizations. This method should not be overlooked as a method of policy initiation.

A guide may be needed when program planning is being done, when new activities are becoming part of the present work areas, or when differences occur regarding procedure. These, as well as many others, should all be recognized as some of the times when new policies might be needed. These should then be drawn up in the most usable form possible.

Who administers the policy: This statement should say in effect, who is guided by policy, but in any case the local county Extension Agents will probably be initiating and administering most of the policy. A certain amount of efficiency in formulation can be realized if administrators initiate and tentatively develop these guides. Reasons that support this statement are:

1. Administrators will be using these new guiding principles; they will have to make them as workable as possible.
2. Many times this system will offer an opportunity to try a new policy or procedure before it is approved in final form. Changes that may have been necessary would have been made and a more permanent writing would result.

Administrative responsibilities will be left with those people in charge of carrying out the County Extension program. This will include the secretarial staff as well as the Extension Agents, and it is possible that some local leaders may also fall into this category. It is easier to understand this if it is realized that the main objective of the local policy is to support and promote an approved County Extension Educational program. Extension agents often find it necessary to delegate part of their educational responsibility. This means that many people are often working toward the same goals (theoretically). The policies should be so drawn to include all the people who are working in this capacity.

The administrators then are also responsible to see that there is a real correlation between the program of work and its supporting policies. A review of the present existing federal, state, and county policies will

show what authorizes the Extension program as it now stands in the county. The objectives to be accomplished by this program are the main reasons for the agents being present in the county then. All local policies should then assist the workers directly or indirectly in accomplishing these ends of "helping people to help themselves".

The obligation of publication: It is the obligation of the administrators to publicize the policies that they are following. Too often problems that exist are due to poor communication, or the total absence of this important public relations tool.

The term communication here should be replaced by the word rapport as this is actually what is involved. The former is a more common and familiar term. Its all inclusiveness can be and often is used in generality. The communication concerned with here is the making known what the local policy is. This can only be done if it is definitely stated and on paper. The proof of statement is then available. Statements are of no value if they can be twisted and misled to mean what an individual wishes them to according to his whims. Flexibility has its advantages and is often necessary, but by the same token its limitations must also be recognized.

A policy, whether an assumed or formulated one, is of no value whatever, unless all those concerned are aware of what that policy is and what its implications are. Here again reiteration of the hazyness of the oral or assumed policy is exemplified by the convenience of its changeability. This is to say that a sound written guide by virtue of the fact that it required planning and work to get it formulated and set down on paper is not changed every other day of the week.

Education can then take place. Education of the public as to what the stand is on certain matters and phases of work that agents are expected to participate in. People are not mind readers and can't be expected to know and understand a policy that can be changed as often as the weather.

While latitude in interpretation may be a recognized feature of policy, inconsistency is not one of its strong points. Publication can help eliminate confusion.

An attempt has been made in this section to point out the methods that might be employed in the initiation, development, and use of policy. Those who are involved in this activity are mentioned. The importance of policy publication is emphasized.

PART III

A SAMPLE PATTERN FOR LOCAL POLICY

This part includes (1) a policy outline, or list of areas for which policy statements are needed, (2) two sample policy sheets, and (3) a listing of general sources of policy. Each of these various phases is preceded by a brief explanation of what they are and how they can be used. The specific purpose of these parts is to serve as a pattern for drafting local policy. If it is known what is attempted, there will be less chance for confusion.

THE POLICY OUTLINE

The following outline is a guide which may be helpful when developing a set of principles for use at the local level. An attempt is made to list areas in which policy might be needed. The outline is not complete and should be developed more completely to fit local needs. It is to serve as a suggested design only.

It is recognized that the writing of the existing policy can be a time consuming task. Also, how it is written will depend upon the experience of the formulators and the thought that they put into it. If this writing is done, however, it does furnish a base upon which other policy may be built. The areas mentioned in the outline may help by bringing to mind some existing problems. Suggestions are listed to stimulate possible thinking

toward policy development. These suggestions are not necessarily desirable criterion to be used as a standard in similar county situations, however, attempt is made to list areas in which it would be desirable for policy to function.

OUTLINE FOR LOCAL EXTENSION POLICY DEVELOPMENT

Areas in which policy should function:

A. Legal Statements of Authorization for County Extension Program

1. This is found in part on the back of the agreement between the Montana Extension Service and the county being serviced.
2. The county may have supplementary agreements.
 - a. A county car may be furnished for Extension work.
 - b. The county may furnish office space outside of courthouse.
3. Commissioner meeting proceedings may contain legal authorization statements.

B. Public Relations

1. Commercial Companies.
 - a. List state and local policy regarding cooperation with commercial companies.
 - (1) Inform specialist of those demonstrations he does which are similar to those offered by commercial workers.
 - (2) The setting up of "ready-made-audiences" for commercial demonstrations.

- b. Relations with organizations that represent no one company - such as the Montana Wool Growers Association - should be defined.

2. Other Agricultural Agencies.

Define responsibilities with:

- a. Soil Conservation Service.
- b. Vocational Agricultural Instructors.
- c. Farm and Home Administration.
- d. Agricultural Stabilization Committee.

3. Personnel Relationships of Co-Workers.

A statement of definite responsibilities and duties of staff and co-workers is desirable.

- a. Associate agents will make recommendations only to those farmers whose problems they are working on.
- b. Associate agents will sign news letters jointly.
- c. A weekly conference shall be conducted to decide the weeks activities.
- d. It is definitely understood how the office secretary will divide her time between the agents.
- e. One office secretary is responsible for the office work.

C. Use of Agent Time

1. Program development and execution.

- a. Policy has been developed which supports the execution of the County Extension Educational program.
- b. Programs are developed according to the needs of the people.

2. Periodic program evaluation survey of progress.

- a. The evaluation procedures and practices are valid and complete.
- b. Program development is based in part on an evaluation.

3. Working hours.

- a. The secretary knows where the agents are at all times and has been properly instructed as to how to inform people of his whereabouts and activities.
 - b. People know which nights the agents reserve for themselves and their families.
 - c. The office hours have been established and published.
- Agents are not on call 24 hours a day for 7 days a week.

D. Reports to the County

- 1. Annual reports are summarized and published.
- 2. Agricultural Planning Committees get an annual report to assist them with planning.
- 3. Publicity reports are fair - credit is given where credit is due.

E. Facilities and Equipment

- 1. It has been definitely decided how the county funds shall be divided for the purchase of Home Demonstration equipment and agricultural demonstration equipment.
 - 2. The various clubs shall buy their own workshop supplies.
- Club members shall be responsible for the purchasing details.

F. Office Management

1. A coffee hour policy has been decided upon.
2. Duplication of material is done for only those organizations cooperating directly with the County Extension office.
3. It is well known who is the manager of the local office.
4. Staff members and office help are required to know and understand what the Extension policies are.
5. It has been definitely decided whether or not the agent's wife shall be the office secretary.
6. There is no question as to whether the office secretary shall act as a 4-H club leader.

G. Budgets

1. Arrangements have been made with the County Commissioners for having mileage in town paid for when agents are on official business.
2. Agents work out the budget estimates together.
3. It is recognized that the senior Agricultural Agent will act as budgetary spokesman.
4. Home Demonstration and Associate Agents know their budget privileges.

H. Ethics

An illustration of what the policy might be in regard to a set

of standards which might be adhered to are listed as follows: ^{1/}

1. Support the objectives and policies of the Cooperative Extension Service and demonstrate job satisfaction (show interest and enthusiasm) as long as he remains in the profession.
2. Continuously improve his professional efficiency and share his knowledge and skills with others.
3. Set a desirable example of effective citizenship.
4. Develop a wholesome balance between work and personal life for the mutual benefit of both.
5. Refuse to accept remuneration other than salary for services performed in the line of duty, except where cases are authorized by the director.
6. Maintain harmonious relations with fellow extension workers, related agencies, and the public.
7. Refrain from criticizing a fellow worker or doing anything which may destroy confidence of others in him.
8. Respect the confidences of the people with whom he works.
9. Give credit where it is due and not promote himself at the expense of others.

I. Publicity

1. When publicizing events, all those concerned get their due mention.

^{1/} Developed by students in R.E. 223, Seminar in Extension Education, Cornell University, Spring Semester, 1952.

2. Joint publicity between the Extension organization and commercial companies is handled according to a set of prepared standards.
3. When submitting copy to the newspapers, the standards of deadline, style, accuracy, and content shall be adhered to.

J. Handling Special Funds

1. Agents handling special county funds such as those used for fertilizer, weedicides, and pesticides will have the business conducted in the name of the office and not his own.
2. It shall be definitely stated who is to be served by the special funds handled by the Extension office.
3. The position of the Extension Service in relation to commercial companies regarding the handling of special funds to purchase Agricultural supplies should be publicly explained.

INDEX AND SAMPLE SHEETS OF LOCAL POLICY

The following sheets are sample policy statements. These are designed for use on the local level and deal with some of the areas in which some problems may arise. Extension practice has been to use loose leaf notebook sheets each containing a separate policy statement. Since this is the accepted system, these sheets have been drawn accordingly. The index and these sheets have been drawn to correspond with the policy outline for purposes of clarity.

POLICY INDEX

Policy:

- A. Legal Statement of Authorization for County Extension Program.
- B. Public Relations.
- C. Use of Agent Time.
- D. Reports to the County.
- E. Facilities and Equipment.
- F. Office Management.
- G. Budgets
- H. Ethics
- I. Publicity
- J. Handling Special Funds.

POLICY F - Office Management

1. The management of the local County Extension Office shall be the responsibility of the senior agricultural agent. These duties include:
 - a. Hiring a competent secretarial staff.
 - b. The dismissal of clerical staff members if necessary.
 - c. Obtaining the assistance of part time office helpers if the need presents itself.
 - d. Training the staff or delegating the responsibility of instruction.
2. A fifteen minute coffee break is authorized for all staff members at 10:00 a.m. and at 3:00 p.m. each day. The coffee shall be prepared and served in the office by the office secretary.
3. Duplication of printed materials will be done only for those local organizations cooperating as part of the County Extension program. These are:
 - a. County Home Demonstration Council
 - b. County 4-H Council
 - c. Podunk Center Agricultural Commission
4. Each new staff member will be required to familiarize himself with the contents of the policy manual which includes the Federal, State, County, and office policies.
5. The Agricultural Extension Agent's wife will not act as the county office secretary.
6. The County Extension secretaries will not act as local 4-H club leaders.

POLICY G - Budgets

1. Agents may turn in mileage claims for in town travel when on official business. This shall be paid for at the rate of .07¢ per mile. The mileage shall be kept track of throughout the month and the total miles shall be turned in as a single item on the expense claim. (As per commissioner proceedings Jan. 3, 1955)
2. It shall be definitely determined and stated what percentage of the appropriated office and equipment fund shall be used for (1) the maintenance of the office, (2) agricultural equipment, and (3) Home Demonstration equipment. This shall be done by conducting a quarterly review of the budget in a joint session attended by all the County Extension Agents.
3. The senior Agricultural agent shall present the budget estimates to the commissioners for approval.
4. Home Demonstration Agents and Associate Agents shall have equal privileges in using budget funds according to the proportions set aside for their respective program activities.

LISTING GENERAL SOURCES OF POLICY

A list of the material that contains policy that presently exists should be prepared. This can be very helpful and the sheets listing these publications relative to the areas concerned should then be inserted respectively in the manual. This will eliminate copying a lot of material; it will also pin point the publications that contain the necessary data.

An example of this could be illustrated in 4-H material. Many guiding regulations exist regarding age of members, types of projects that can be carried, how old members have to be to attend congress, and number of delegates who can attend said 4-H Congress. Much of the material would be found in the 4-H Club member's record book. Some of it will be found in news letters and still other parts of it may be found in 4-H bulletins. A written list could pull this data together.

The following outline lists some areas under which this type of data may be listed. Also listed are some of the publications in which policy is found.

PUBLICATIONS WHICH CONTAIN POLICY STATEMENTS

Areas in Which Publications May Be Listed

I. Adult Education

A. Agricultural

1. Local Policies for Adult and Young Farmer Education,
Agricultural Education Department, Montana State College,
1954.

B. Home Demonstration Work.

1. Organization of a County Home Demonstration Council, Extension Service, Montana State College, 1947.
2. Organization of a Home Demonstration Club, Extension Service, Montana State College, 1947.
3. Constitution and By-Laws Montana Home Demonstration Council, Extension Service, Montana State College, June, 1949, Revised June, 1950.
4. Home Demonstration Handbook, Extension Service Publication HD-165, Extension Service, Montana State College, Sept. 1951.

II. Youth Education

A. 4-H Club Work.

1. Extension Agents Handbook on 4-H Club Work.
2. Minutes Montana 4-H Club Advisory Committee.
3. Minutes Montana 4-H Local Leaders Assoc. Executive Committee.
4. Circular No. 1025 Entitled Montana 4-H Club Projects.
5. Memorandum of Understanding Between the Boy Scouts of America and the Montana Extension Service of the Montana State College, Oct., 1954.

B. Builders Club State College, Oct., 1954.

1. 4-H Builders, Extension Service, Montana State College, Published jointly by The University of Idaho, Montana State College, the State College of Washington, July 1954.

C. Youth Education Done by Other Agencies.

1. Memorandum of Understanding Relative to Smith-Hughes and Smith-Lever Relationships for Montana, Extension Service, Montana State College, Feb. 8, 1930.

III. General Administration and Management

A. Federal Publications.

1. Joint Committee Report on Extension Program Policies and Goals, U.S. Department of Agriculture and Association of Land Grant Colleges and Universities, U.S. Government Printing Office, Washington, D. C., 1948.
2. Report of Committee on the Scope of Extension's Educational Responsibility, Federal Extension Service, U.S.D.A., Washington, D. C., Jan. 1946.
3. Federal Legislation, Regulations, and Rulings Affecting Cooperative Extension Work in Agriculture and Home Economics, Miscell. Publication, No. 285, U.S.D.A., Washington, D. C., Sept. 1937, Revised Jan. 1946.
4. Employee Handbook, Agriculture Handbook No. 23, Revised, Office of Personnel, U.S.D.A., Washington, D. C., Dec. 1953.

B. State.

1. Hansen, Carl O., Combined Report - Policies and Programs of the: Farmers Home Administration, Montana Agricultural Experiment Station, Soil Conservation Service, Agricultural Stabilization and Conservation, Montana Agricultural Extension Service, July 22, 1954.
2. Manual of Policy, Montana Extension Service.

BIBLIOGRAPHY

- Franzen, Carl B., "Board Policies - They Need Not Be Complicated", American School Board Journal, 124:34, March, 1952.
- Gilbaugh, John W., "Board Policies and Regulations Are in Writing at Humboldt", American School Board Journal, 124:53, June, 1952.
- Godwin, W. R., "Our School Board is Tops", Journal of the National Education Association, 40:191, March, 1951.
- Hamlin, Herbert M., "Program Planning Is Not Enough", Local Policies For Agricultural Education in the Public Schools, pp. 15, 1952.
- Hardesty, Cecil D., "Some Obligations of the Board of Trustees and Superintendent of Schools", American School Board Journal, 124:35, April, 1952.
- Jones, Howard R., "A Bill of Rights For School Administrators", Education Digest, 18:34, October, 1952.
- Miller, B., "Boards of Education and Personnel", American School Board Journal, 126:34, April, 1953.
- Smith, James T., Policies For Agricultural Education in the Public Schools, pp. 15, 1952.
- Students of R.E. 223, Seminar in Extension Education, Cornell University, Spring Semester, 1952.
- Tuttle, Edward M., "National Association Funds Growing Interest in Written Policies for Boards of Education", American School Board Journal, 71:19-22, March, 1952.
- Woodring, Paul, "An Open Letter to Teachers", Harper's Magazine, 205:28-31, July, 1952.