

4-H Orientation & Training Outline for New County Extension Agents

Training Topic	Key Points & Resources/Web Links	Date Discussed
Annual 4-H Enrollment & Membership		
Annual Publications – the rules that govern our program	<p>The following resources are updated annually and available online: http://texas4-h.tamu.edu/volunteer/ (click on “club management”)</p> <ul style="list-style-type: none"> • Texas 4-H Rules & Guidelines • Procedures for Dismissal of a Volunteer • Club Project List • Enrollment Forms (adult & youth) • Group Enrollment Form • Code of Conduct • Consequences of Misbehavior • Waiver & Indemnification Form • Media/Photograph Release Form • Texas 4-H Resource Catalog • Fast Facts: Participation & Membership • Fast Facts: Understanding the ES-237 	
4-H Member Categories	<p>Categories are based upon grade:</p> <ul style="list-style-type: none"> • Clover Kids: K-2 (non-competitive) • Juniors: Grade 3, 4, & 5 • Intermediates: Grades 6, 7, & 8 • Seniors: Grades 9, 10, 11 & 12 <p>Age Guidelines (as of August 31 of the beginning of the 4-H year):</p> <ul style="list-style-type: none"> • Min: 8 years old (in addition to being in the 3rd grade) • Max: 18 years old 	

Enrollment Fees	<p>Youth:</p> <ul style="list-style-type: none"> • \$20 if enrolled prior to October 31st • \$25 after October 31st <p>Adult Volunteers:</p> <ul style="list-style-type: none"> • \$5 annual volunteer application fee <p>Participation Fee Waiver Request</p> <ul style="list-style-type: none"> • Available at: http://texas4-h.tamu.edu/volunteer/ (click on “club management”) 	
4-H Club/Enrollment Types	<p>4-H Fast Facts: Participation and Membership Units http://texas4-h.tamu.edu/wp-content/uploads/2015/09/enroll_fastfacts_participation.pdf</p> <p>Membership Units:</p> <ul style="list-style-type: none"> • 4-H Community Club: organized based upon proximity of participants • Project/SPIN Club: organized based on a single project; can be short-term <ul style="list-style-type: none"> ◦ http://texas4-h.tamu.edu/wp-content/uploads/Chartering-SPIN-Clubs.pdf • School Club: organized and conducted in a school • After School Club: organized and conducted in an after school setting • Military Club: organized of youth who have a family member in the military • Special Interest Group: Learning activity that takes place in an informal setting; Youth are enrolled on a group enrollment form. • Curriculum Enrichment: Learning activity that takes place in a classroom setting. Youth are enrolled on a group enrollment form. 	
Zero-based Enrollment	<p>Youth and adult volunteers must re-enroll each year! 4-H year runs from September 1 thru August 31</p> <ul style="list-style-type: none"> • Typically re-enrollment begins August 15 on 4-H Connect 	
ES-237	<p>Federal report required to be submitted each fall for previous 4-H year Data is pulled from 4-H CONNECT</p> <p>Fast Facts: Understanding the ES-237 Report: http://texas4-h.tamu.edu/wp-content/uploads/2015/09/enroll_fastfacts_civilrights.pdf</p>	

4-H Connect	<p>Online enrollment and event management system:</p> <ul style="list-style-type: none"> • https://texas.4honline.com/ <p>4-H Connect Support Resources</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/4-h-connect-resources/ <p>Establishing an employee profile – be sure to select “yes” to the employee question, which will bypass the screening and payment requirement!</p> <p>Paper forms are also available at:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/volunteer/ 	
Working with Local Schools		
Enrichment Curriculum	<p>Curriculum available to enhance classroom learning Bring 4-H to youth in school setting Texas 4-H Resource Catalog: http://texas4-h.tamu.edu/wp-content/uploads/2015/09/essentials_resourcecatalog.pdf</p>	
Extracurricular Activities & 4-H Eligibility Issues	<p>Annual Letter released each August 4-H is NOT an extra-curricular activity UNTIL the school approves it as such Compliance Procedures:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/?attachment_id=1613 	
Adjunct Faculty Status	<p>Annual Letter released each August Process completed annually as a team by county staff Adjunct Faculty status allows you to supervise students who are 4-H members when they are at a 4-H extracurricular activity. Sample adjunct faculty agreement available at:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/?attachment_id=1613 <p>TEA & UIL Side-by-Side Document:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/?attachment_id=1613 	

<p>Securing Eligibility Information and Excused Absences</p>	<p>Recommended procedures available at:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/?attachment_id=1613 • Check with each school for their preferences on the process of communicating academic eligibility. <p>Must check eligibility when:</p> <ul style="list-style-type: none"> • Participating in a 4-H event requires an absence from school AND/OR • Competitive event as a 4-H member 	
<p>Chartering 4-H Clubs & Money</p>		
<p>Chartering Guidelines</p>	<p>Chartering Instructions, Worksheet, and other handouts</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/volunteer/ (click on “club management”) <p>Charter Application Process – through 4-H Connect Chartering Deadline: July 15th unless establishing a new 4-H club/group May be completed by Agent or Club Manager</p> <p>Requirements to establish/charter a 4-H club:</p> <ul style="list-style-type: none"> • General Information (see instructions for more details) • Bylaws (sample available) • Employer Identification Number (EIN) (for new clubs) • Budget (template available) • Bank Accounts/Information: copy of current bank statement; 2 signatures on accounts • Annual Review of Finances <ul style="list-style-type: none"> ◦ http://texas4-h.tamu.edu/wp-content/uploads/Financial-Management-Guide.pdf <p>Getting an EIN for a new club:</p> <ul style="list-style-type: none"> • Online – must include an individual’s SSN; get EIN immediately • Fax – no individual SSN required; approximately two weeks to receive EIN • Use the Sample IRS Form SS-4 as a guide to complete the form 	
<p>4-H Name and Emblem</p>	<p>Proper use of 4-H name and emblem</p> <ul style="list-style-type: none"> • Charter required to use name of 4-H • Logos available at: http://texas4-h.tamu.edu/volunteer/ (click on “logos”) • Use of NIFA USDA emblem guidelines: https://nifa.usda.gov/resource/4-h-name-and-emblem 	

Insurance	<p>Liability</p> <ul style="list-style-type: none"> • Provided for all active 4-H members through Texas 4-H, Inc. <p>Medical/Accidental Coverage</p> <ul style="list-style-type: none"> • Provided for all active 4-H members and volunteers. This is a secondary insurance policy (member's primary insurance policy pays first). • If an injury occurs at a 4-H event, claim report form must be completed and submitted to State 4-H Office within 10 days. • Claim Report Form: http://texas4-h.tamu.edu/wp-content/uploads/2015/09/essentials_claimform.pdf <p>Activities Involving Non 4-H Members:</p> <ul style="list-style-type: none"> • For activities involving non 4-H members, additional medical/accidental insurance coverage should be purchased. • American Income Life is a great vendor that is easy to work with. Policies can be written for a year or by event. • http://www.americanincomelife.com/who-we-serve/4-h-insurance 	
Taxes	<p>IRS Income Tax Filing e-postcard (Form 990-N)</p> <ul style="list-style-type: none"> • Must be filed annually by January 15th <p>Texas 4-H is not exempt from paying state sales tax!</p> <ul style="list-style-type: none"> • More information about this is in the financial management rules and guidelines: http://texas4-h.tamu.edu/wp-content/uploads/Financial-Management-Guide.pdf 	
Financial Management Practices	<p>Texas 4-H Financial Management Rules & Guidelines:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/wp-content/uploads/Financial-Management-Guide.pdf • 4-H fund raising policy – TX Comptroller Resource available at: http://texas4-h.tamu.edu/wp-content/uploads/Exempt-Organizations.pdf <p>Annual Review of Club Finances (this is part of Chartering)</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/wp-content/uploads/2015/09/charter_review.pdf • Must have 3 reviewers of each 4-H club/group account • Review forms are required at annual performance review 	

Fund Raising	<p>Fund Raising by clubs adds enrichment and allows them to coordinate projects and support 4-H members.</p> <p>County Extension faculty should be notified of club fund raisers.</p> <p>Any club/group raising money in the name of 4-H should be chartered.</p> <p>Amount raised should correspond with amount needed/budgeted.</p> <p>More details in the 4-H Financial Management Rules & Guidelines:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/wp-content/uploads/Financial-Management-Guide.pdf 	
4-H Club/Group Management		
4-H Club Meetings	<p>Attend meetings regularly or as frequently as possible. Make a plan with your coworkers.</p> <p>Club Management Guide:</p> <ul style="list-style-type: none"> • Available at: http://texas4-h.tamu.edu/volunteer/ (click on “club management”) <p>Additional Club Meeting Resources: http://texas4-h.tamu.edu/volunteer/ (click on “meeting inspiration”)</p> <ul style="list-style-type: none"> • Four Parts to a Successful 4-H Club Meeting • 4-H Club Meeting Agenda Template • 4-H Club Meeting Notes (Form) • Strategies for Hosting Successful 4-H Meetings 	
4-H Club Managers	<p>Support Club Managers and establish regular communication</p> <p>Learn the process of selection and rotation of Club Managers in the county</p> <p>Club Manager Resources available at: http://texas4-h.tamu.edu/volunteer/ (click on “meeting inspiration”)</p> <ul style="list-style-type: none"> • Top 10 List for Club Managers • Five Tips to Be Successful as a 4-H Club Manager • Club Ed (monthly meeting topics and installation ceremonies) 	
Adult Leader Associations	<p>Collective group of 4-H parents and volunteers that work to improve leadership opportunities for 4-H members. This association can serve as the fundraising arm for the county 4-H program and also serve as an avenue for volunteers to exchange ideas, discuss mutual concerns and help each other.</p>	

Council, Ambassador & other leadership groups	<p>Council:</p> <ul style="list-style-type: none"> County-based group with representatives from each 4-H club <p>Ambassadors:</p> <ul style="list-style-type: none"> Leadership youth group that helps represent and promote 4-H through service and marketing 	
Committees	<p>Developed based upon agency requirements and county need.</p> <ul style="list-style-type: none"> Program Area Committees Youth Advisory Board Project Coalitions (Ag/NR and FCS) <p>Regional Program Leaders provide leadership and oversight for these efforts.</p>	
Marketing 4-H	<p>Grow True Leaders Tool Kit:</p> <p>http://texas4-h.tamu.edu/volunteer/ (click on “club management”)</p>	
Project Management & Event/Contest Management		
What is a 4-H Project?	<p>Texas 4-H Project List:</p> <ul style="list-style-type: none"> http://texas4-h.tamu.edu/projects/ <p>Project List Handout available at:</p> <ul style="list-style-type: none"> http://texas4-h.tamu.edu/volunteer/ (click on “club management”) <p>Project Resources available on each individual project page.</p>	
4-H Project Support	<p>Needs assessment – what are youth interested in?</p> <p>Prioritizing projects</p> <p>Gaining volunteer support</p> <p>Starting new projects</p>	
4-H Opportunities	<p>Texas 4-H Clover – catalog of opportunities, programs, activities and events</p> <ul style="list-style-type: none"> http://texas4-h.tamu.edu/wp-content/uploads/15_16_Clover.pdf 	

Awards and Recognition	<p>4-H Recognition Model:</p> <ul style="list-style-type: none"> • Available in the Club Management Guide • http://texas4-h.tamu.edu/wp-content/uploads/2015/09/essentials_management_guide.pdf <p>Awards Description List:</p> <ul style="list-style-type: none"> • Link coming soon! <p>4-H Recordbooks and Recordkeeping:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/recordbooks/ <p>4-H Scholarships:</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/scholarships/ 	
Event Calendar & Deadlines	<p>Calendar of events:</p> <ul style="list-style-type: none"> • County – you maintain this as the CEA • District – check with your 4-H Specialist • State – check the website and/or with your 4-H Specialist <p>Know the event date/deadlines and “work backwards” for:</p> <ul style="list-style-type: none"> • Marketing/promotion of project • Volunteer project training • Youth project training • Project visits • County event date/deadline 	
District Contest Information	<p>District Calendar</p> <ul style="list-style-type: none"> • Dissemination of Information • Deadlines 	
Texas 4-H Roundup	<p>Takes place in June of each year at Texas A&M University – College Station</p> <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/events/roundup/ • Texas 4-H Roundup Guide released each fall (October/November) • Registration manual released in Spring • Highlights: <ul style="list-style-type: none"> ○ Qualifying contests ○ Invitational contests ○ Workshops ○ Trade Show ○ Dances/Concerts 	

Ethics, Work Habits, & Policies	<p>Follow rules, guidelines and deadlines Spend equal time with 4-H families Youth development FIRST, not winning at all costs</p>	
Personal Calendar Management	<p>Maintain what works for you</p> <ul style="list-style-type: none"> • Extension provides an 18-month paper calendar usually in September • Electronic calendar <p>Keep up with events Maintaining work-life balance</p>	
FCS Program Support	<p>4-H FCS 101:</p> <ul style="list-style-type: none"> • Training accompanies Program Excellence Academy 1 • Resources available at: http://texas4-h.tamu.edu/volunteer/ <p>FCS Toolbox:</p> <ul style="list-style-type: none"> • Project information, lesson plans and resources • http://texas4-h.tamu.edu/volunteer/ <p>FCS Website:</p> <ul style="list-style-type: none"> • http://fcs.tamu.edu <p>FCS Agent Only Website:</p> <ul style="list-style-type: none"> • http://fcsagents.tamu.edu/agent_login.php • Username is county name • Password is zip code of county office 	
Livestock Program Support	<p>Texas Youth Livestock & Agriculture:</p> <ul style="list-style-type: none"> • http://texasyouthlivestock.com/ • Validation information available • Facebook page for CEAs and ASTs only: Texas Livestock Validation <p>Livestock 101: Training accompanies Program Excellence Academy 1</p> <ul style="list-style-type: none"> • Resources available on agent only site at http://texasyouthlivestock.com • Username: agent; Password: 4hlivestock • Quality Counts: http://agrilife.org/qualitycounts • Texas 4-H/FFA Livestock Program Ethics Policy: http://lambandgoatvalidation.tamu.edu/files/2011/03/2014-2015-Ethics-policy.pdf • Stock Show Deadlines • Cash management related to livestock projects 	

Conflict Resolution	<p>Communication is key! When conflict does happen, be sure to document. Keep supervisor informed of what's going on. Gain support from DEA, 4-H Specialist and State 4-H Office as needed. Helpful resources:</p> <ul style="list-style-type: none"> • 4-H Rules & Guidelines • Procedures for Dismissal of a Volunteer • Both available at: http://texas4-h.tamu.edu/volunteer (click on "club management") 	
Protecting Our Youth		
Risk Management	<p>Various resources available at: http://texas4-h.tamu.edu/volunteer/protecting-our-youth/</p> <ul style="list-style-type: none"> • Waiver, Indemnification, and Medical Treatment Authorization Form • Media Release • Code of Conduct • Consequences of Misbehavior <p>All of these components are included within online enrollment on 4-H Connect.</p>	

<p>Camps and Programs for Minors</p>	<p>http://texas4-h.tamu.edu/volunteer/protecting-our-youth/</p> <ul style="list-style-type: none"> • Training PowerPoint • Checklist • Required Documentation Form • System Regulation • Extension Procedure • Risk Assessment, Management and Insurance Matrix • ADA Accessibility Guidelines • Waiver, Indemnification and Medical Treatment Authorization Form • Authorization for Dispensing Medication • Overnight Chaperone Volunteer Position Description • Camp Chaperone Position Description • Texas DSHS Campus Program for Minors Form <p>Definition of Camps & Programs for Minors</p> <ul style="list-style-type: none"> • Full supervisory duties of minors • More than one consecutive day (day camps or overnight) • Where youth are apart from their parents/guardians <p>If meets these criteria:</p> <ul style="list-style-type: none"> • Complete Risk Assessment Matrix (keep 3 years) • ADA statements on promotional materials with deadline • Waiver, Indemnification and Medical Treatment Authorization Form • Authorization for Dispensing Medication (keep 3 years) • Insurance – Liability & Accidental/Medical • Child Protection Training from each employee and volunteer (good for 2 years) • Background checks for each employee and volunteer (good for 3 years) • Ratio of 1 chaperone to every 8 youth of same gender • Provide chaperone descriptions and orientation <p>IN ADDITION (if applicable):</p> <p>Texas Department of State Health Services Camps & Program for Minors Form</p> <ul style="list-style-type: none"> • TDSHS Form EEH-28 • Must be filed at least 5 days prior to start of camp • If more than 20 campers • If not a licensed day or youth camp • Campers attend or temporarily reside at camp for all or part of at least 4 days 	
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<p>Inclusion and ADA</p>	<p>http://texas4-h.tamu.edu/volunteer/protecting-our-youth/</p> <ul style="list-style-type: none"> • Side Show Presentation • Accommodation Guidelines • Accommodation Overview • Fact Sheets <p>General Information & Tips</p> <ul style="list-style-type: none"> • Inclusion means being aware of disabilities and strategizing ways to include youth with disabilities • Americans with Disabilities Act (ADA) • Disabilities may include, but not limited to physical and mental disabilities • Include the ADA statements on all promotional materials with deadline • “What can we do to help your child be successful in this activity?” • People first language (the child with the disability; not the disabled child) 	
<p>Sexual Discrimination and Title IX</p>	<p>http://texas4-h.tamu.edu/volunteer/protecting-our-youth/</p> <ul style="list-style-type: none"> • Slide Show Presentation • Title IX Extension Sexual Discrimination and Harassment Policy <p>General Information and Tips:</p> <ul style="list-style-type: none"> • Title IX prohibits discrimination on the basis of sex in any educational program or activity receiving federal assistance • No gender-specific trips, competitions, awards, clubs, activities, etc. • No donations, sponsorships, or awards based upon discriminatory practices • Sexual harassment – be aware and act if needed • If incident occurs, contact DEA & Dr. Boleman; maintain confidentiality; maintain detailed records 	
<p>Working with Volunteers</p>		
<p>Role(s) of a Volunteer:</p>	<p>Requirements:</p> <ul style="list-style-type: none"> • Must be at least 18 years of age to volunteer • Volunteers serving as chaperones must be at least 21 years of age <p>Roles:</p> <ul style="list-style-type: none"> • Direct Volunteer • Indirect Volunteer • Club Manager • Project Leader • Activity Leader 	

Youth Protection Standards	Volunteer screening resources available at: <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/wp-content/uploads/2015/09/volunteer_screening_manual.pdf Volunteers must: <ul style="list-style-type: none"> • Enroll annually on 4-H Connect • Pay a \$5 volunteer application fee • Be screened every 3 years • Complete Child Protection Training (required every 2 years via 4-H Connect) 	
Volunteer Training Opportunities	Virtual Volunteer Conference: <ul style="list-style-type: none"> • http://texas4-h.tamu.edu/volunteer/ (click on “training) • Online trainings offered three times throughout year • Recorded trainings posted for access online Trainings offered via 4-H CONNECT	
Professional Development		
TAE4-HA Membership	Professional Development Association <ul style="list-style-type: none"> • http://tae4ha.tamu.edu District Association Opportunities State Conference in August National Conference (NAE4-HA) each Fall	
District Trainings	4-H Specialist to provide more details as it pertains to the district.	
Roles	4-H responsibilities among county staff 4-H Coordinator duties District Extension Administrator (County Extension Administrator, if applicable) 4-H Specialist (District & State Specialists) Regional Program Leaders	