

Montana 4-H Policies & Procedures

SECTION 1

Introduction

This handbook expresses 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

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 in all of their programs and activities 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

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. The MSU County Extension Agent has the ultimate responsibility for and leadership of the 4-H program. 4-H program policy authority is held by Extension personnel whether at the county or state level, and is administered by the Director of the Montana State University Extension. 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 other locations outside the state of Montana.

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

4-H programs were initially 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.

There must be some form of written agreement between the individual, organization or group granted authorization for the use of the 4-H name and emblem and the designated persons responsible for granting authorization at the appropriate level—county or state. 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 national level.

MSU Extension Agent Authority

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.

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 of positive youth development 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

Through educational, learning-by-doing projects, club meetings, community service projects, events, and activities - young people and adults have the opportunity to develop the ***Five Cs**.

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.

Resulting in the 6ththC – Contribution

- 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 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 the goals 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, 4-H Foundation and county extension professionals are a cooperative team partnering with youth and adult volunteers to deliver the MT 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 tolerance.

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's 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 an enrollment card by the county deadline and having it on file in the county office, a youth enrolling in any 4-H program is considered a 4-H member and is eligible to take part in other 4-H programs providing they meet eligibility requirements and are bonafide 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 giving 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. Clubs and leaders that refuse 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.

Montana 4-H Policies & Procedures

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

Organized 4-H Club

Is 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 a member enrollment card 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 fund-raising 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 audit
- 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 and volunteer screening form.
- 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
- Pay leader dues and pass the volunteer screening procedures required of volunteers.
- Follow club and county guidelines

Cloverbuds

Youth ages 5-8 years are eligible to participate in the 4-H Cloverbud program. The 4-H Cloverbuds curriculum is specially designed to meet the needs and interests of these youth. Youth in this age group enroll **ONLY** in Cloverbuds although they participate in a wide variety of activities common in the 4-H program. Cloverbuds do **NOT** participate in competitive activities and are not to be judged against others. The program emphasis should focus on an introduction to 4-H with opportunities for fun and learning in informal settings.

An enrollment card must be completed for each Cloverbud member. 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. 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.

For additional information about Cloverbuds, please consult the publication, ***4-H Cloverbuds: Agent and Volunteer Leader Guide (#5274)***.

Membership

Youth must be eight years old on or before October 1 of the current 4-H year (turning nine during the 4-H year of October 1 – September 30) to participate in 4-H or 4-H sponsored peer competitive events or activities. Peer competition is defined as two or more individuals or groups working to achieve a mutually-exclusive goal. A 4-H or 4-H sponsored event is one that uses 4-H in the name of the event and/or the 4-H name and emblem promoting the event. Examples of competitive events include judging contests, exhibits, shows, and other performance activities. It is not the intention of this policy to prevent youth under age 9 from participating in informal games at 4-H gatherings or meetings such as a family volleyball game at a 4-H picnic, a fun game at a 4-H meeting, or other similar examples.

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 youth 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.

The official 4-H program year is October 1 through September 30.

Supporting Structure

4-H programs are more effective when there is a support structure. County Extension Advisory Committees, County 4-H Councils, statewide committees, county 4-H foundations, 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.

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'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 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.

Montana 4-H Policies & Procedures

SECTION 4

Youth Membership

Youth who turn 6 years of age on October 1 through September 30 may join 4-H as a Cloverbud and enroll only in the Cloverbud project. The 4-H Cloverbud curriculum is specially designed to meet the developmental needs and interests of these younger youth. While counties are not required to offer a Cloverbud program, if they do, these programs MUST conform to state guidelines. The emphasis in Cloverbuds is on fun, learning and an introduction to the 4-H program. Listed below are the participation guidelines for involving Cloverbuds:

- Cloverbuds do not participate in competitive activities and are not to be judged against others.
- Cloverbuds can exhibit at fairs, but no live animals are allowed.
- Cloverbuds can exhibit in a special “Cloverbuds” division at the fair, but these exhibits should not be evaluated competitively.
- Cloverbuds can not attend overnight camps unless accompanied by a parent/guardian in special programs designed with their unique needs in mind.
- Cloverbuds do not participate in fund-raising activities.

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

Youth who turn 9 on October 1 through September 30 may join 4-H as a 4-H member and enroll in project(s) listed in the 4-H Clover with the exception of Shooting Sports and some horse projects. To enroll in Shooting Sports, youth must be 10 on October 1. The Colt to Maturity project requires that youth be 13 on October 1 and meet other project requirements as stated in the project manual. If youth turn 20 years of age on October 1 through September 30, they 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.

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 are allowed to 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 be in agreement with the terms of the transfer.

4-H membership is signified by:

- completing enrollment in 4honline or
- completing a group report form (for example - special interest, afterschool, school enrichment, camps).

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 and activities.

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. 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. 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.

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.

Montana 4-H Policies & Procedures

SECTION 5

[4-H Volunteer Membership](#)

[Volunteer Conduct](#)

[Certification Background](#)

[Volunteer Definitions](#)

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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. The following statements clarify this partnership and the parameters around which volunteers should function:

1. 4-H volunteers are essential to the Montana 4-H Youth Development program. They are valued by MSU Extension and Montana 4-H. At the same time, 4-H volunteers serve at the pleasure of the local County Extension agent. 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 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 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. 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.).
4. Volunteers may also work indirectly with youth as judges, council and committee members or in other supporting roles.
5. With the exception of MSU Extension Agents (see #6), MSU Employees may serve as volunteers if their duties are not the same as their duties within their role and scope of employment. Volunteer roles and responsibilities must be approved by their supervisor and

Extension Agent. Additionally, employees must sign the MSU Employee Volunteer Agreement. MSU employees will not be paid for their services as specified in the volunteer agreement nor will be covered by Workers' Compensation for any accident or medical expenses. MSU employees are expected to follow Montana 4-H policies and procedures including completing the 4-H volunteer application and agreement, disclosure and consent form and clearing a criminal background check.

6. MSU Extension Agents oversee and serve as the authority in the volunteer management program. Agents may serve in a volunteer role with approval of the Director of the 4-H Center for Youth Development and Regional Department Head and will be approved on a case-by-case basis.

7. There are several categories of volunteers, including the following:

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 or teen leader responsible for a given project area in the 4-H club. 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, teen leader or youth 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.

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. Check “Recommended Practices for Camp” for guidelines specific to camping programs.

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. Additional information about the roles and expectations for Ambassadors can be found in the Ambassador policies available on the Montana 4-H web site at www.montana4h.org.

4-H Resource Leader - 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.

8. 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, one-on-one unsupervised contact with youth or handle funds must participate in a volunteer certification process. This process includes completing a 4-H volunteer application, completing a disclosure and consent form, completing an agreement form, and clearing a criminal background check. Details about this process are found in the Montana 4-H Volunteer Guide available on the Montana 4-H Website (www.montana4h.org).

9. 4-H clubs 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. Guidelines for the volunteer application and enrollment process are in the Montana 4-H Volunteer and Risk Management Guide available on the Montana 4-H Website (www.montana4h.org).

10. 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.

11. 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. No action 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. Guidelines for reviewing a volunteer's service and suspending and/or removing a volunteer are outlined in the Montana 4-H Volunteer and Risk Management Guide.

12. 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.

13. MSU Extension salaried staff and 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.

14. Salaried and volunteer staff are expected to conduct themselves as professionals in all interactions with 4-H members and leaders. In order to protect individuals, salaried and volunteer staff are encouraged to avoid, being alone with a single child. Extension salaried and volunteer staff should not fraternize with 4-H members under the age of 18 outside of Extension program activities.

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.

Any volunteer in Montana 4-H, who has direct contact with youth, will not be approved to serve in an official capacity until he/she has successfully completed the volunteer certification process, including background checks, and signatures on all appropriate paperwork. The County Extension Office will be notified by the 4-H Center for Youth Development of the background check results. It is the discretion of the County Extension Agent to determine if volunteers not having direct one-on-one contact should be also participate in the volunteer certification process.

Volunteer Chaperones at state events are expected to do the following:

- 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.
- Have fun and participate fully in the program and attend all events and activities with youth.

- Abide by the 4-H Volunteer Agreement.
- Communicate with the Event Coordinator on matters related to arrival, departure, lodging, healthcare and any relevant emergency information.
- Serve as a positive role model and example for youth and other chaperones.
- Inform county agents of any disciplinary matters or items of concern with youth or other adults

Montana 4-H reserves the right to deny any person the opportunity to participate in 4-H activities if the person's 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. 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 serve at the pleasure of the University and may be dismissed at any time. Persons denied participation in 4-H activities will be provided a 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 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. 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.

Volunteer Certification Background

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. 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.

The U.S. Department of Agriculture (USDA), Montana State University and Montana State University Extension prohibit discrimination in all of their programs and activities on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation and marital and family status. Issued in furtherance of cooperative extension work in agriculture and home economics, acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, Jeff Bader, Director of Extension, Montana State University, Bozeman, MT 59717.

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.

Certified Volunteer

A volunteer that has completed the Montana 4-H certification process and has received a letter of acceptance from MSU Extension.

Direct Volunteer

An individual who volunteers in a capacity that includes face-to-face, unsupervised contact with youth. Examples include, but are not limited to, club organizational leaders, project leaders, chaperones, volunteers transporting youth and exchange hosts.

Episodic/Resource Volunteer

An individual who volunteers for a single or limited activity, event or program. These individuals do not have sole responsibility for youth and are under the supervision of a certified volunteer or MSU Extension faculty member. 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).

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.

Who is certified through certification process?

- Adult Volunteers serving as direct volunteers or handling funds are subject to the Montana 4-H Volunteer certification process.
- Adult Volunteers serving in an episodic/resource capacity (guest speakers, judges, etc) who do **not** have sole responsibility for youth and are under the supervision of a certified volunteer or staff member are **not** subject to the certification process.
- Youth Volunteers are not certified through this process.

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.

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. 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. Future changes to this policy may require follow-up screenings of certified volunteers on a periodic basis.

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 4HOnline.
3. New signed forms from the volunteer:
 1. Montana 4-H Volunteer Agreement
 2. Montana 4-H Volunteer Personal Background

Volunteer Certification Forms and Documents

[4-H Volunteer Application](#)

This form is utilized when an individual is applying to be a 4-H Volunteer.

[4-H Volunteer Disclosure and Consent](#)

This form is reviewed and signed when an individual is applying to be a 4-H Volunteer. This form must accompany the 4-H Volunteer Application.

[4-H Volunteer Agreement](#)

This form outlines a Montana 4-H Standards of Behavior for 4-H volunteers. This form also presents MSU Extension 4-H expectations of volunteers and outlines what 4-H volunteers can expect from MSU Extension 4-H. Additionally, the form contains information on Child Abuse & Neglect and a volunteer's role and responsibilities in identifying youth who may be abused or neglect. This form must accompany the 4-H Volunteer Application **and** is completed on an annual basis as certified volunteer re-enroll.

[4-H Volunteer Personal Background](#)

This form is used for re-enrollment of a certified volunteer on a yearly basis.

[4-H Volunteer Certification Policy and Procedures](#)

This document outlines the Montana 4-H volunteer certification policy and process.

[MSU Employee Volunteer Agreement](#)

This form is required for any MSU employee who volunteers outside of the role and scope of their employment. This includes grant staff (4-H, SNAP-Ed, etc.) and all MSU campuses and in any position (staff, faculty, professional, etc.) or department.

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
- Criminal Background Check administered through Verified Volunteers
- Checking the Montana Sexual and Violent Offender Registry
- Orientation of accepted volunteers
- Annual re-enrollment of accepted volunteers

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.

Steps in the Volunteer Certification Process

There are several steps to enrolling new volunteers and volunteers with a lapse in service in Montana 4-H. This guide is intended to help County Extension Staff complete the process in an orderly and efficient manner. For a more concise list of steps, refer to Detailed Volunteer Enrollment/Certification Guide.

1. **Collect Paperwork:** Before proceeding to the next steps, collect ALL the necessary paperwork from volunteer applicant. Depending on how you order the background screening through Verified Volunteers, you may not need all the paperwork below.

- 4-H Volunteer Application (For all volunteer applicants)
- 4-H Volunteer Agreement and Standards of Behavior (For all volunteer applicants)
- 4-H Volunteer Disclosure and Consent Form (Only for Placing an Order option in Verified Volunteers)
- Extension Media Release Form (For all volunteer applicants)
- Any county paperwork required for enrollment

2. **Disclosures on Application:** If the volunteer applicant disclosed any information in Section III [Personal Background] of the volunteer application send a copy of the disclosure to the Montana 4-H Center.

3. **4HOnline Enrollment:** Enroll volunteer applicant in 4HOnline.

4. **4HOnline Invoice:** Create an invoice to pay for the Verified Volunteers background screening.

5. **Verified Volunteers:** Place an Order or Invite applicant to enter their information for a background screening through Verified Volunteers.

6. Montana 4-H Center reviews background screening: If further action is required, Montana 4-H Center staff will contact county. See detailed guide for additional steps that might need taken if screening is not clear, and reasons approval might be delayed.

7. Montana 4-H Center approves or denies volunteer based on results of application, reference checks and screening.

8. **Acceptance Letter is sent** to volunteer applicant. If approved without restrictions, county sends letter. Montana 4-h Center mails letter if there are restrictions.

9. **Volunteer Orientation/Training:** The new volunteer must participate in an orientation opportunity provided by the Extension Office. The basic orientation is a provided factsheet, but a more in-depth orientation is recommended.

Accepted volunteers will re-enroll every year. Volunteers should complete the following on a yearly basis:

1. Review/edit an annual volunteer enrollment either online through 4HOnline or printout provided by the Extension Office.
2. Complete and sign the Montana 4-H Volunteer Personal Background form.

3. Complete and sign the Montana 4-H Volunteer Agreement.
4. 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.

Alternative Screening Policy

The basic standard of care is that the criminal background check will be completed through Verified Volunteers which requires basic applicant information including social security number. All efforts will be made to insure personal information is safe and secure as outlined above.

If volunteer applicant is unwilling to provide a social security number, than an alternative fingerprinting method can be used with approval of the State Volunteer Specialist and/or 4-H Director. Please see Alternative Volunteer Certification Policy for procedure and details.

Montana 4-H Policies & Procedures

SECTION 6

4-H Projects, Curriculum and Record Keeping

The guiding principle for Montana 4-H is that of intentional design in creating 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 Event and Activity Handbook, available on the website, serves as a resource for many of the statewide events and activities offered

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 and 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 and 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 project curriculum for youth to aid in their learning and growth. Curriculum typically includes 4-H project manuals, but may also include 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 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 club experience. 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.

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.

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.

Montana 4-H Policies & Procedures

SECTION 7

[Bank Accounts](#)

[Fundraising](#)

[Raffles and Bingo](#)

[Disbanded or Split Clubs](#)

[Handling Financial Complaints](#)

[Dispersal of Money from Statewide Events](#)

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 such 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 web site at www.national4hheadquarters.gov.

The Internal Revenue Service (IRS) recognizes the tax exemption status of 4-H clubs and affiliated 4-H 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.

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 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. Bank accounts must not be under an individual's social security number but rather an EIN.

4-H Bank Accounts

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 that they are used to support the quality of the 4-H program.

They 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 should be 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 2012, 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.

Fundraising

4-H clubs may choose to finance their activities through their own fund-raising activities. Fund-raising should be done for the good of the total group, consistent with the county 4-H fund-raising 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 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 fund raising to 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 should 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.

Games of chance, lotteries, betting activities involving money, and other related kinds of activities do not support the mission of 4-H and should not be engaged in.

Bingo

Bingo 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. Guidelines for this type of activity, provided by the State Gaming Office, 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. A 4-H group conducting a raffle should check with the County Commissioners or Tribal Council where the drawing will be held about any requirements for raffles.

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 state 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 don't 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 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 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 for Youth Development 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. Following approval by them, expenses will be paid by the Montana 4-H Foundation using the Event/Activity Account first and supplemented by general fund dollars.

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. 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.
3. All official 4-H events and activities must provide appropriate adult supervision.
4. 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.
5. The Extension agent must be informed of the official start date and end date.
6. 4-H participants in 4-H sponsored events must be covered by accident insurance. Youth who are not members of organized clubs should be included as a group enrollment and insurance purchased for the specific event.
7. For any event or activity for which funds are collected (for example, entry fees, registration, etc.), appropriate financial management practices should 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.

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.

Montana 4-H Policies & Procedures

SECTION 9

[Risk Management and Insurance](#) [Child Protection Guidelines](#)

Risk Management and Insurance

The Montana 4-H Center has a Montana 4-H Volunteer and Risk Management Guide to provide guidance and 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” on the Montana 4-H web site 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.

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

Montana 4-H has developed a policy statement on child abuse and neglect because of concern for the safety and welfare of children. As a youth development program, 4-H must take a firm stand to ensure that children are treated with respect and that their safety is guaranteed while participating in programs. In an effort to clarify Montana 4-H's position 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 that child abuse or neglect is occurring will make a report to the local Department of Public Health & Human Services.

Montana 4-H Policies & Procedures

SECTION 10

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

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(ies) 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

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

The grievance statement should be filed with the appropriate person(s), for example the County 4-H Grievance Committee, County 4-H Council Executive Committee, State 4-H Council, 4-H Center for Youth Development, etc.

Grievance documents received by the 4-H Center will be considered confidential information. Extension Staff, Councils or Committees who may receive copies should 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 should be protected.

