

Guidelines for CALS Extension Specialists: Generating External Revenue from Program Fees¹

Justification: Reductions in General Purpose Revenue (GPR) support and reduced purchasing power due to inflation require CALS specialists to obtain external sources of funds to continue to provide quality extension programs.

Objective: These guidelines are intended to assist specialists in the process of obtaining external sources of funds from registration fees for conferences, workshops, and related events involving specialist presenters. Shared sponsorship of Extension events is encouraged in order to help reduce the cost to participants. The guidelines do *not* cover other sources of program revenue (e.g., Extension grants and contracts, sale of publications and software, and salary savings).

Applicability: These guidelines apply to Extension specialists in the College of Agricultural and Life Sciences (CALS) at the University of Wisconsin-Madison affiliated with the Agriculture and Natural Resources (ANRE) and Community, Natural Resources, and Economic Development (CNRED) Program Areas.

COMPONENTS

1. General Program Revenue funds (as available) will continue to be allocated to departments to provide a base level of support for supplies and expenses incurred by Extension specialists. The department allocation will be based generally on Extension FTEs (faculty and programmatic academic staff) within the department. Departments have full discretion in determining the use of those funds.
2. Program revenue funds will not be used to cover the cost of salaries for tenured and tenure track faculty. Program revenue funds can cover the cost of salaries for staff providing services to and/or support of educational programs.
3. A major source of program revenue is fees collected from participants in educational programs. County agents and state specialists should jointly plan these programs and arrange events on a multi-county basis as appropriate. Planning for Extension fee-generating events should occur as part of team planning, and should include a budgeting process to help establish a registration fee that will cover program costs.
4. Program costs that participant fees are expected to cover include: meals and refreshments, distributed educational materials, meeting room rental, special program delivery costs (e.g., satellite fees.), outside speaker honorariums and travel, contingencies against a program loss, publicity, tour transportation, medical/accident insurance, presentation materials (e.g., slides and transparencies), and applicable specialist charges.

¹ This is a revised version of a draft policy recommended by an *ad hoc* fee policy committee of CALS Extension specialists. The committee was chaired by Brian Holmes, Biological Systems Engineering. Other members included Larry Bundy, Soils; Steve Deller, Ag & Applied Econ; Jerry Doll, Agronomy; Bruce Jones, Center for Dairy Profitability; Mike Siemens, Animal Sciences; Walt Stevenson, Plant Pathology; and Teryl Roper, Horticulture. The conscientious and difficult work of the committee is gratefully acknowledged.

5. Guidelines for specialist charges are noted in the table below:

PROGRAM SPONSOR	CRITERIA CHARGES
Institutional	<p>The clientele for this program is the staff of local, state or federal agencies.</p> <p>No charge or charge pre-negotiated with the agency.</p>
Extension (including specialist participation in CALS Agricultural Research Station [ARS] events)	<p>This program is sponsored solely by Extension or jointly by Extension and ARS.</p> <p>No charge if a registration fee is neither customary nor appropriate. For programs involving a registration fee, the fee should be set to recover all or part of the travel expenses for CALS specialists who are asked to be presenters (see 6 below).</p>
Jointly Sponsored	<p>This program is sponsored jointly by Extension and one or more entities that receive joint credit for sponsoring the program.</p> <p>The charge is travel expenses or \$100/specialist per meeting, whichever is larger.</p>
Non-Extension	<p>This is a program for which the primary credit/sponsorship is a non-Extension entity.</p> <p>The charge is a speaker fee of \$200/specialist per meeting, plus travel and all other expenses related to the program.</p>

6. Budgeted registration fees for Extension-sponsored events should be announced to the registrants, but they may be charged a lower fee. When a lower fee is charged, credit should be given to the entity(s) contributing resources to reduce the fee. Examples of such contributions could include: commodity associations, purchased advertising, company donations, GPR S&E, Federal, state, county, foundation or other grants, etc. This procedure will help clientele to better understand the costs of delivering an educational program and to appreciate the support provided by others.
7. When the same or similar program is offered at multiple sites, the budgeting process for all sites should be combined, resulting in a common registration fee at all sites.

8. Agents are encouraged to publicize major revenue-generating Extension events outside of their counties, whether or not they have been involved in their planning. Revenues earned by specialists participating in these events can help offset the cost of travel for activities that do not yield revenue.
9. Some research grants include an express or implied expectation that the grant will support extension/outreach of research results to the granting source or others. Where these funds are used to cover or reduce the cost of a specialist(s) participating in a program, the grantor should be recognized in the program announcement or registration form (See 6 above).
10. In the event that a specialist has inadequate supply and expense funding to cover travel-related costs to participate in an Extension activity for which fees are either not charged or are insufficient to cover expenses, the specialist or the agent(s) requesting assistance should request supplemental funding from the applicable program leader. Program leaders will make every attempt to ensure that no legitimate agent request for specialist assistance is denied because of the inability of specialists to cover their travel-related costs from their departmental S&E budgets.

INSTITUTIONAL SUPPORT

1. The responsibility of CES is to offer quality educational programs at the lowest cost to program participants. This responsibility is being challenged by the need to generate program revenue to cover expenses incurred in delivering programs. The faculty/staff need assistance in learning how to obtain grants to support their activities and to keep registration costs low. This need is identified in the report submitted to Dean O'Connor on October 14, 1997, by the Ad Hoc Committee on Revenue.
2. UW-Extension is committed to providing educational programming with equal access to all without regard to ability to pay a registration fee. To that end, grants should be available to the extension program sponsor to recover the lost revenue incurred when offering a no-charge registration fee to those who have indicated an inability to pay. These grants would be provided by the applicable program area upon request of the Extension program sponsor.
3. Registration fees and payment of costs, including program revenue fees, are to be processed by the program sponsor or appropriate designee. If the program sponsor does not have an accounting system that allows this procedure, the applicable program area office or the CALS Outreach Services office should be used to provide this service. Costs for this service must be included in the budget.
4. Specific CALS accounting procedures and other guidelines on sources and use of program revenue for CALS Extension specialists are contained in *CALS Extension Program Revenue Accounts: Implementation Rules and Procedures* (July 1996-REVISED).