

## COLLEGE OF FORESTRY OUTREACH EDUCATION POLICY

Outreach Education (OE) for natural resource scientists, professionals and the general public is a part of Extended Education, one of the three major functions (Resident Instruction, Research and Extended Education) of the College of Forestry (COF). OE is a responsibility of every COF Department and is part of the evaluation criteria in promotion, tenure and annual performance review of faculty. OE is an important activity focused on information and technology transfer, interaction of faculty with scientists, resource managers and other groups, and life-long education in the natural resources arena. The primary goal of the COF Outreach Education Program is to provide high-quality programs necessary to meet educational needs of natural resource scientists and professionals and to enhance public understanding of natural resources.

OE involves a variety of formats with short courses, workshops, field tours, institute programs and symposia as common types of offerings. The length of OE events varies from one day to several weeks. Audiences for these events are usually not involved in resident instruction degree programs. OE events may be certified for professional continuing education credits by professional societies and licensing organizations. Some events can qualify for regular OSU course credit.

Two basic types of OE events are offered: “designed educational” events and “issue oriented” events. Designed educational events generally cover a number of days, are based on a sound curricular approach and rely on COF faculty and other experts to achieve clear educational objectives. Issue oriented events present findings, knowledge and perspectives concerning a current issue or topic.

### **Organization, Responsibilities and Collaboration**

OE is usually a department-driven activity with oversight and organizational/logistical facilitation provided by COF. COF and joint Department/COF efforts are encouraged in development of individual events. Independent of origin, most OE activities are coordinated through the COF Outreach Education Office.

Occasionally, some or all of the following Departmental functions may be performed by the Director of Outreach Education. These are negotiated between the Event Leader, the OE Director and the appropriate Department Head when completing the OE-1 form (Outreach Education Event Proposal). There is significant room for flexibility and collaboration in designing OE events.

The following are the primary roles of the Departments and COF. For events in which the COF is not the primary sponsor, much of the Departmental role may be taken by the event sponsor or the Director of Outreach Education. Many duties are collaborative and are shared with the Department and Outreach Education Office.

**Department or Event Sponsor (includes Event Leader)**

- Event forecasting – concept, need, demand, timing (shared with OE Office)
- Event proposal, design and development
- Event budget development (shared with OE Office)
- Educational material gathering and preparation (shared with OE Office)
- Event presentation
- Event cancellation if needed (shared with OE Office)
- Event fiscal accountability (shared with OE Office)
- Development of event evaluation plan (shared with OE Office)
- Event follow-up activities such as publication of proceedings

**COF Outreach Education Office**

- Long-range forecasting of OE needs, demand and opportunities
- Event planning assistance
- Event budget development (shared with Department)
- Event logistical arrangements
- Event AV coordination and/or operation
- Event marketing and advertising
- Website development and maintenance
- Event registration
- Event cancellation if needed (shared with Department and Event Leader)
- Educational material gathering and preparation (shared with Department)
- Educational material formatting and assembly
- Event enrollment management
- Event fiscal monitoring and accountability (shared with Department)
- Development of event evaluation plan (shared with department)
- Event evaluation administration
- Professional certification and continuing education credit allocation (OSU regular course credit is coordinated through COF Director of Undergraduate Education)
- Annual program reporting (shared with Associate Dean of Extended Education)

**COF Business Office**

- Participant billing
- Accounting and fiscal reporting
- Fiscal review of Outreach Education Office and program

**Director of College Programs**

- Fiscal monitoring and oversight
- Event budget approval
- Supervise and organize fiscal review of Outreach Education Office and program

**Associate Dean of Extended Education**

- Outreach Education oversight and coordination (within and outside the College)
- Liaison with OSU Continuing Education and relevant offices
- Event proposal approval
- Approval of allocation of over-realized income
- Annual program reporting (shared with Outreach Education Office)

**COF Outreach Education Council**

- Outreach Education planning
- Allocation of over-realized income
- Troubleshooting
- Annual review of Outreach Education program

**Director of Outreach Education**

- Provides leadership for COF Outreach Education
- Manages Outreach Education Office
- Manages continuing and extension type distance education events

**Outreach Education Planning, Reporting and Review**

OE needs are identified in a variety of ways. Planning of events occurs at department, joint department or college level. Joint planning also occurs with other colleges and departments on campus and with non-OSU organizations. The COF Outreach Education Office and the OE Director are available to assist in designing, planning and managing OE events that are not led by COF faculty as time and facilities allow. If conflicts or limitations arise, first priority will be given to COF sponsored or co-sponsored events.

The COF Outreach Education Council consists of COF department heads, the Associate Dean for Extended Education, the Director of College Programs and the Director of Outreach Education. This council will conduct an annual review of the OE program based upon a programmatic and financial report provided by the OE Director and the Associate Dean for Extended Education. This review will generally take place in February or March, be based on a report for the previous calendar year and be used to plan the next fiscal year.

## **Outreach Education Event Proposals**

OE event proposals might be developed at the College, joint department or department levels depending upon the nature of the proposal. Most proposals for individual OE events are developed by faculty in consultation with department heads. Faculty who leads an individual OE event is an Event Leader. At least one event leader for every event must be Instructor or Professorial ranked faculty. Adjunct, emeritus and affiliate faculty are also encouraged to be event leaders.

When an OE event is determined to be conducted, one-page proposals (form OE-1) are prepared and submitted through an approval process (event leader, OE Director, Department Head, Associate Dean for Extended Education, Director of College Programs). The Director of College Programs will assign an Index to facilitate tracking event income and expense. Events offered for OSU credit are submitted to COF Director of Undergraduate Education for approval.

For programs repeated within a fiscal year or offered over consecutive years, the OE-1 form is required only for the first offering unless significant changes in event content or audience are involved.

## **Outreach Education Budget Proposals**

OE event budgets are developed, within COF and OSU guidelines, by faculty in consultation with department heads. The COF Outreach Education Office facilitates budget development particularly for logistical arrangements.

The Oregon University System treats OE events as self-sustaining, full-cost recovery programs. Since OSU is a nonprofit organization, profits cannot be a program objective or budgeting goal. OE budgeting is guided by the necessity of establishing participant fees at a level that obtains full-cost recovery, including cost of faculty and staff time (compensated via various options), access to facilities and equipment, program development, publications and educational materials, Outreach Education Office costs and University administrative overhead. In some cases Department Heads may wish to invest in a particular event and full salary recovery may not occur. Some events might be partially supported by governmental agencies or industry. This support will be reflected in the event budget and could potentially lower individual participant fees.

OE event budgets are prepared on form OE-2 and submitted through the approval process (event leader, OE Director, Department Head, COF Accounting Supervisor and Director of College Programs).

Faculty compensation options (or combinations of options) depend upon the event and faculty/department head preferences. They can be handled as an FTE charge to the program index for a period of time (2-3 months) surrounding the event, overload compensation, part of normal assignment in the individual's annual instructional/research FTE, or a funds transfer to a development account after the event is fully reconciled.

On a selective basis and consistent with their position descriptions, overload compensation can be paid for COF faculty leading or co-leading new OE events. This overload compensation should be at a sufficient level to provide an incentive for COF faculty to develop new OE events. Examples of program types that meet the selective criteria to receive overload compensation for faculty include major new ongoing programs, programs that address a particularly timely issue, programs that are outside of expected normal faculty job performance and programs that represent a significant increase in faculty workload. The compensation will be derived from all or part of the instructional salary (FTE) charged against the OE event. This method of compensation is at the discretion of the department head. Such arrangements will comply with University regulations.

Outreach Education Office fees collected for managing OE events will be based upon a sliding-scale, flat fee-fee basis. This will allow the Office to be appropriately compensated for the amount of time, materials and other costs essential to manage an event. The OE Office fee will be documented in form OE-2. The OE Office fee schedule will be reviewed annually. Changes to the OE Office fee schedule will be approved by the Director of College Programs and the Associate Dean for Extended Education and communicated to the Outreach Education Council.

### **Event Approval**

Event proposals (OE-1) are submitted to the appropriate department head(s) and the Associate Dean for Extended Education for approval. After approval by the Associate Dean, the COF Business Office assigns an account index to the event authorizing expenditures. Event budgets (OE-2) are submitted to appropriate department head(s) and the Director of College Programs for approval.

If a unit of the COF is jointly sponsoring an event with another organization but is not the host institution for the event and is not handling registration and money, the approval process should still be followed, including completion of the OE-2, if there are any budgetary implications arising from joint sponsorship.

### **Fiscal Administration**

Event leaders, the OE Director and department heads administer individual OE events within approved budgets. Overall budget control is provided by the OE Director and department heads with oversight by the Director of College Programs. If there are major changes in an event budget after it is approved, consultation among the event leader, department head, OE Director and the Director of College Programs is expected.

By law, program billings and fee collections must be done through bonded financial offices. The COF Business Office meets this requirement. The COF Outreach Education Office, in cooperation with the Business Office, makes all billings and collects all OE event fees. Collected fees are deposited into the OSU financial system and become State of Oregon funds, subject to all applicable fiscal rules and procedures. A unique OSU

Index number will be assigned to each event and closed out once event accounts are reconciled. The goal is to provide a financial summary and close the Index within 90 days following the event.

Although OE is budgeted for full-cost recovery, there are instances when revenues do not cover all costs. Most commonly these instances result from under-enrollment or from course cancellation. Occasionally they result from expenditures which exceed an approved budget. To deal with event losses, all event financial results within a department are pooled on an annual basis and a department net gain (loss) is calculated. Net losses are the responsibility of individual departments and are covered first by assessment against development accounts, second by transfer of event expenses to another departmental index and third by assessment against future net gains (over-realized income) from OE events. In cases where COF departments co-sponsor or co-produce an OE event which produces a loss, the loss shall be equitably apportioned among the departments involved. Losses unable to be covered at the department level will be reimbursed by the College.

Instances develop when there is a gain (over-realized income). Most commonly these instances result from enrollment beyond that anticipated or expenditures below those budgeted. Over-realized income is recognized by annually pooling all OE programs within a department and calculating net gain. Over-realized income is pooled across participating departments and gain distributed proportionately to departmental development accounts less any allocation for the COF developmental account.

Development accounts for OE have been established for the COF and each department. Departments may further break accounts down to faculty sub-accounts. These accounts are funded from OE events either through over-realized income, budgeted salaries (usually Extension) which are not expended during the fiscal year, or a budgeted transfer from event fees. Department heads and the Director of College Programs are responsible for administering the respective OE development accounts. The University may limit the amount of funds that can be kept in development accounts.

Annually a fiscal review of the OE program will be conducted. This review will be conducted principally by the COF Business Office under the leadership of the Director of College Programs.

### **Program Cancellation**

Program cancellation occasionally becomes necessary usually due to under-enrollment that would cause a significant financial loss. The COF Outreach Education Office monitors registrations and alerts event leaders and department heads to situations that might result in financial loss. Program cancellations are made by the Director of College Programs upon recommendation by the appropriate department head(s), event leader(s) and OE Director. Authority is thereby withdrawn to make further expenditures against the event Index for the cancelled program.

## **Participant Cancellation Fees**

Participant cancellation fees will be set to recover funds lost by cancellation without unduly penalizing those participants who cancel. Up to two weeks before an event there will be a no cancellation fee. Between 13 days and 3 working days of an event there will be a nominal cancellation fee. Cancellation within three working days of an event will incur the nominal cancellation fee plus all direct expenses not recoverable after cancellation. No fee is charged for substitution of registrants within an organization.

## **Special Fee Situations**

Early registration discounts may occasionally be given. Discounts may also be given for multiple registrations within an organization. Special fees can be set for students and faculty. Special fees usually will at least cover the variable cost of additional participants.

## **Evaluations**

OE events are evaluated to develop information for program improvement and to identify additional OE opportunities. The performance of event leaders and others involved in event presentation is also evaluated as part of performance review for retention, promotion and tenure and salary adjustment. Evaluation procedures and materials are administered by the OE Office. Necessary evaluations are identified by departments and the OE Office in each event proposal (OE-1) with the goal of at least one evaluation per event.