

## **Role in Annual Budget Process ABSTRACT**

County budgets for Cooperative Extension are no longer routine annual processes. In the past, a worst case scenario for extension might be reduced funding for equipment or no funding to support a Program Assistant position. Now, county commissioners are tightening departmental budgets more and more and looking critically at Extension funding. Extension is not a mandated program. In North Carolina, advisory leaders were able to help save extension funding. In another situation, advisory leaders helped salvage only 4-H and Master Gardener's programs. The advisory leadership role is increasingly important in the county budget process.

This lesson is designed to teach advisory leaders how the county budget cycle unfolds and what happens during each phase. Since every county is different, the lesson discusses the cycle in terms of three phases. These phases are:

Phase 1 –The County Manager gives the County Extension Director guidance for budget development. The Director may receive guidelines on percentage of increase or decrease along with when and how to make the annual request. Larger, more urban counties tend to be more bureaucratic and impersonal than rural counties.

Phase 2 – The budget is presented during a formal hearing to the County Manager or Commissioners. Sometimes advisory leaders are asked to speak at the budget presentation. In other situations, it is specified that only the Extension Director makes the presentation. Regardless, the advisory council should be engaged in budget development and be kept informed of developments in every step of the process.

Phase 3 – Follow-up and strategic planning for the next year happens during phase 3. This may well be the most critical part of the process because this is when relationships are enhanced or built with key people. This is also when consistent communication points are hammered throughout media, at key events and in one on one contact.

Advisory leaders and the advisory council play a collaborative role with Extension Faculty in the county budget process. It is the County Director's role to help define what the role should be and specifically what advisory leaders can do to facilitate. Some counties annually do a "Report to Commissioners" that advisory leaders help plan and deliver. In some situations, the less said by advisory leaders the better. In all cases, it is very important that advisory leaders are kept informed about what's included in the budget particularly regarding changes and how the process will unfold.

This lesson engages advisory leaders in thinking about Cooperative Extension from a County Commissioner's perspective. They work in small groups to develop a budget strategy and communication points designed to persuade the commissioners to act favorably. Finally, advisory leaders are asked to consider who they would contact in their county if a real budget crisis were to develop.

This lesson will help faculty and advisory leaders understand the county budget cycle and their role in supporting extension in an ongoing manner. While details of the process will be different in every county, the phases of budget development will be similar.

## **REFERENCES**

Phone interviews with the following North Carolina County Extension Directors:

- Travis Burke, Pasquotank County Extension Director, NCCE
- Ed Emory, Duplin County Extension Director, NCCE
- Rhet Davis, Alamance County Extension Director, NCCE
- Cathy Graham, Scotland County Extension Director, NCCE
- Cheryl Lloyd, Durham County Extension Director, NCCE

Personal interviews with the following district Extension Directors:

- Dr. Russell King, Northeast District Extension Director, NCCE
- Mr. Danny Shaw, South Central District Extension Director, NCCE