

# Role in Annual Budget Process

## Objectives:

- ✓ Leaders will understand the county budgeting process.
- ✓ Leaders will learn roles for advisory council members in the budget cycle.
- ✓ Leaders will discuss best practices in planning and conducting annual Report to the Commissioners activities.
- ✓ Leaders will analyze their personal network for how it fits into a strategic rapid response system.

## Advance Preparation:

- ✓ Copy handouts
- ✓ Study Powerpoint presentation

## Materials Needed:

- ✓ Chart paper
- ✓ Easel
- ✓ Markers
- ✓ Powerpoint presentation
- ✓ LCD projector
- ✓ Handouts

**Time Needed:**45 minutes

## BACKGROUND

The county budget cycle begins in January. The Commissioners typically ask all departments to prepare a budget for the year and give them until March to do that. Counties handle the input process differently, but generally the County Director will ask faculty and the advisory council for input. It is important to engage the advisory council at this stage because budget items for equipment, computer upgrades, additional office space or a new office building would need council members total endorsement and understanding. Ideally, it is the advisory council that asks for new or out-of-the-ordinary budgetary items.

It is during this preparation phase that it would be strategically ideal to conduct an annual Report to the Commissioners or Report to the People, as some counties call it. This is where the groundwork is laid to justify county budget for Cooperative Extension. This is a continuing part of the education process of county government leaders. This report is also a good time to connect what Extension reports to the interests of various Commissioners. They typically run on some platform. Showing a link to those interests will help establish relevancy and value.

During March, the budget is presented to the Commissioners during hearings. County Extension directors often take a leader of the advisory council to help deliver the Extension budget request. Follow-up with commissioners after the presentation is another role for the advisory leaders. This step may proceed until the final budget is passed. There may be many intervening steps depending on what the commissioners do to juggle the numbers according to resources available.

The ideal county budget situation is one where everything progresses routinely. With county budgets stretched to the max, county commissioners turnover and county manager changes, the status quo may be the exception rather than the rule now. The

goal with this lesson is to develop advisory leaders as partners in an ongoing education and relationship-building effort so that the county budget does not reach crisis stage.

### **INTEREST APPROACH** (10 minutes)

Cooperative Extension is a discretionary program for county government. What one reason would you give commissioners to continue funding Cooperative Extension if they were considering eliminating the program due to lack of resources?

- Organize the group into threes and ask them to prepare one or two compelling reasons to continue funding.
- Share responses and list on a chart pad.
- Discuss with the following questions:
  - What do commissioners value?
  - Do situations like this happen overnight?

### **LESSON** (25 minutes)

- Do the PowerPoint presentation about the budget process.
- Organize the group into small groups of 4 or 5 people. Give everyone a copy of the worksheet, "Helping the Board Say Yes." Ask each group to develop communication points and outline a presentation to make to the Board of Commissioners.
- After groups have had a chance to complete the assignment, ask each group to share the communication points and plan.
- Discuss the following questions:
  - Who would be the most believable presenters?
  - In your experience, how important is the hearing?
  - What information do commissioners like to hear?
  - Who are key customers to keep informed?

### **APPLICATION** (10 minutes)

- With a partner, share who you would contact if you were notified the county Extension budget were in trouble for funding.
- Ask for volunteers to share responses. Write responses on chart paper.
- Discuss the following questions with the group:
  - What do you think is the most critical phase of the budget process?
  - When would it be most effective to do a Report to the Commissioners?

#### **Tips for Using this with your Council**

- Get one response from each dyad then go back around to get responses not already listed.

### **REFERENCES**

Phone interviews with the following county Extension Directors:

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

Personal interviews with the following district Extension Directors:

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



## ROLE IN ANNUAL BUDGET PROCESS

Your help is needed in providing vital feedback on the **SEAL Curriculum** you have just completed. Please take a moment to complete this survey.

For each of the topics listed below, in the LEFT column, circle the ONE number that best reflects your LEVEL OF UNDERSTANDING before the **SEAL Curriculum**. Then, in the RIGHT column, circle the ONE number that best reflects your LEVEL OF UNDERSTANDING after the **SEAL Curriculum**.

### LEVEL OF UNDERSTANDING

	Poor 1	Average 2	Good 3	Excellent 4
Level of Understanding	<i>BEFORE</i> the Program		<i>AFTER</i> the Program	
Understanding the county budget process	1	2	3	4
Understand the role of advisory council members in the budget cycle	1	2	3	4

**Intentions.** For the following behaviors, check the box that describes what you plan to do as a result of the **SEAL Curriculum**.

Behavior Change	Yes	No
Will you analyze your personal network to see how it fits into a strategic rapid response team?	<input type="checkbox"/>	<input type="checkbox"/>

**Satisfaction.** Check the box for the statement that best describes your thoughts concerning the program.

Satisfaction	Strongly Disagree	Disagree	Agree	Strongly Agree
The subject matter was timely for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The speakers were effective.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The information was practical to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can go and use the information I learned today in my organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, this was a very educational program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**What is the most significant thing you will apply (feel free to list more than one)?**

**Do you feel like what you learned provides you the ability to lead more effectively? (Circle the best answer)**

YES

NO

- Please explain your answer or provide an example.

**Please provide any additional information on the back.**

*Thank you very much for your time!!!*