

County Director and 4-H Staff Responsibilities Summary Matrix (Revised May, 2019)

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Topic	4-H Handbook Chapter Reference	County Director (CD) Approval Required	County 4-H YDP Staff Responsibility	State 4-H YDP Responsibility
Chapter 3 : Affirmative Action and Civil Rights				
Expansion and Review Committee	3-VI Expansion and Review	Yes - Assure that the E & R Committee meets annually	Yes - Ensure that the E & R committee meets annually and submits a report to the CD	
All Reasonable Efforts	3-VII Geographic Areas 3-VII One-Race Units		Yes - Identify geographic areas of service and one-race units	
4-H Club Outreach Methods Documentation	3-X C All Reasonable Efforts (ARE)	Yes - Enter into project board in the absence of an Advisor	Yes - Collect form and provide to the Advisor or CD for entry into project board	
Cooperating Groups	3-XII Private, Non-Public Cooperating Groups, Assurance of Nondiscrimination Letter		Yes - Review annually	
Diversity Training	3-XIII A Diversity Training/Orientation for Volunteers			Yes - Provide brochure hyperlink to adult volunteers as part of the online enrollment process
Affirmative Action & Sexual Harassment Complaints	3-XIV AA Complaints 3-XV Sexual Harassment	Yes - Provide complaint or refer complainant to the ANR Affirmative Action Officer or Title IX Officer	Yes - Provide complaint or refer complainant to the ANR Affirmative Action Officer or Title IX Officer. Notify CD.	Yes - Investigation report for Sexual Violence Sexual Harassment Complaints regarding 4-H adult volunteers and other participants provided to State 4-H Director for appropriate corrective action and disciplinary sanctions

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Chapter 4: Enrollment and Delivery Mode				
County Program Fees	4-III B County and 4-H Unit Program Fees	Yes - All county and unit fees must be reviewed and approved	Yes - Review and submit to CD. Provide input and monitor the fee process.	Yes - Annually the State 4-H Director reviews and sets the state program fees
County Enrollment Process	4-V Enrollment Process 4-VII 4-H Membership Deadlines		Yes - Follow the 4-H enrollment process and meet payment deadlines established for state 4-H program fees. Approve enrollment deadlines in specific programs and events. Ensure all individual and group enrollments are entered into 4hOnline.	
Limiting Participation	4-XI A County Residence 4-XI C Maximum Number of Members 4-XI D Developmentally Appropriate Programming		Yes – Approve any limitations on enrollment	Yes - Approve projects or membership across state lines
Chapter 6 - 4-H Adult Volunteers, Parents, Guardians, and Other Adult Participants in the 4-H Youth Development Program				
Dual Employee/Volunteer	6-VII Conflict of Interest/and or Conflict of Commitment	Yes - Can limit participation or dismiss volunteer if conflict exists	Yes - Report issues to CD	

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Chapter 6 - 4-H Adult Volunteers, Parents, Guardians, and Other Adult Participants in the 4-H Youth Development Program				
Appointment 4-H Adult Volunteers	6-X Initial Appointment of a 4-H Adult Volunteer 6-XI Re-Appointment or Renewal of a 4-H Adult Volunteer 6-XII Transfer of Appointment (or Reappointment)	Yes – Review and appoint all volunteers	Yes – Oversee application process and ensure completion of all requirements	Yes - State 4-H Office Volunteer Coordinator consulted for collaboration on resolution, limited appointment, non-renewal, progressive dismissal or immediate suspension/dismissal
NLI Notification	6-XI D Non-renewal of a 4-H Adult Volunteer 6-XI E Failure to Reapply as a 4-H Adult Volunteer (Break in Service) 6-XI F Resignation of a 4-H Adult Volunteer		Yes - Notify the Custodian of Criminal Records at UC ANR Risk Services	
Suspension and/or Termination of a 4-H Adult Volunteer	6-XIII Suspension and/or Termination of a 4-H Adult Volunteer	Yes - Have authority to suspend or terminate. Notify State 4-H Office Volunteer Coordinator prior to suspension and/or termination.		Yes - State 4-H Office Volunteer Coordinator consulted for collaboration on resolution, limited appointment, non-renewal, or progressive dismissal

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Chapter 6 - 4-H Adult Volunteers, Parents, Guardians, and Other Adult Participants in the 4-H Youth Development Program				
Complaints	6-XIV 4-H YDP Complaints 6-XV Complaints Regarding Statewide 4-H YDP Policies or Procedures	Yes - Have authority to take disciplinary action, suspend, limit, or terminate individuals	Yes - Follow the Volunteer Conflict Resolution Manual or the 4-H Parent, Guardian, Adult Participant Conflict Resolution Guides	Yes - State 4-H Office Volunteer Coordinator available for collaboration on resolution, limited appointment, non-renewal, progressive dismissals, or immediate suspension/dismissal. State 4-H Director resolves complaints regarding statewide 4-H YDP policies or procedures.
Chapter 7: Experiential Learning				
Evaluation	7-II Evaluation		Yes - Academics are responsible for program evaluation	Yes - Academics are responsible for state level program evaluation
Curriculum	7-III D Developmental Appropriateness of Project Curriculum		Yes - Approve and evaluate curricula for local, county use	Yes - Approve and evaluate curricula for use at state level
Fairs	7-IV Fairs, Expositions and Other Sponsored Shows 7-IV C Eligibility to Show at Fair 7-IV F 4-H Project Transfers 7-IV G 4-H Sponsored Fairs		Yes - Review rules. Set any additional requirements to show. Approve project transfers between organizations. Approve 4-H sponsored fairs at the county level.	Yes - Approve 4-H sponsored fairs at the area or state level

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Chapter 7: Experiential Learning				
Exchanges	7-IX 4-H Youth Development Program Exchanges	Yes - Approve exchanges, may be delegated to designee	Yes - Ensure that all host families with individuals over 18 undergo background check and are 4-H adult volunteers	Yes- Determine if background check process is adequate
New Events	7-XII National, State, Multi-County and County Events, Activities, and Competitions	Yes - Approves county and multi-county events held in county, may be delegated to designee	Yes - Provide paperwork to CD for approval	Yes - Approves national and state/statewide events
4-H Shooting Sports	7-XIII E Acquisition of firearms, air guns and BB guns 7-XIII H Purchase of Ammunition	Yes - CD responsible for approving if shooting sports is offered in the county and approval of purchases	Yes - Oversee trainings and certifications	Yes - Keep list of certifications
Chapter 8: 4-H Volunteer Management Organization and Unit Management				
4-H Charter	8-II 4-H YDP Charter	Yes - Review, approve and submit request to State 4-H YDP office. Letter and charter certificate send to club. May request charters to be revoked.	Yes - Review and submit request to CD for approval	Yes - All charter requests are approved by the State 4-H Director. Director may revoke charters at any time.
4-H Volunteer Management Organization (VMO) Bylaws and Constitutions	8-III E Constitution and Bylaws 8-III F Revisions to VMO Bylaws and Constitution	Yes - Approve all changes and submit to State 4-H Director for approval, may be delegated to designee	Yes - Review and approve initial documents and all changes. Submit to CD for approval. Submit fully signed documents to the State 4-H Director for approval.	Yes - Approved by the State 4-H Director and a copy must be filed with the State 4-H Office

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Chapter 8: 4-H Volunteer Management Organization and Unit Management				
4-H Unit Bylaws and Constitutions	8-IV D Constitution and Bylaws 8-IV E Revisions to 4-H Unit Bylaws & Constitutions	Yes - Review and approval, may be delegated to designee	Yes - Review, approve, and forward to CD	Yes - Initial unit bylaws and constitutions are approved by the State 4-H YDP Director
Chapter 9: Financial Management				
4-H Name and Emblem	9-II B Responsibility	Yes - Approval use of name and emblem at county level	Yes - Oversee proper use	Yes - State 4-H YDP Director approves all multi-county or statewide use of name and emblem
Bank Accounts	9-IV Bank Accounts	Yes - Approval to establish unit business checking and savings accounts, may be delegated to designee	Yes - Oversee establishment of bank accounts & proper signatures	Yes - Approval of checking and savings accounts for state level units
ATM and Deposit cards	9-IV D Use of ATM and Deposit Cards	Yes - Approve use of deposit cards, may be delegated to designee	Yes - Monitor and ensure that units and VMOs do not have ATM cards	
4-H VMO/Unit Monthly Bank Statement Review	9-IV E Review of Monthly Statements	Yes - Review monthly bank statements, may be delegated to designee. Investigate discrepancies.	Yes - Review all bank statements monthly and report to CD or designee	Yes - Assist with the review of account/unit discrepancies. Report discrepancies to the Controller's office.

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Chapter 9: Financial Management				
Dissolution of Charter	9-IV G Revocation and Dissolution of a Charter		Yes - Submit the notification of 4-H VMO 4-H VMO_Unit Dissolution Form to the State 4-H Office	Yes - Update 4hOnline enrollment, IRS records as needed, coordinates final financial reporting with county staff
4-H EIN Numbers	9-IV H Federal Employee Identification Numbers (EIN)		Yes - Maintain record of all EIN numbers	Yes - Assign EIN numbers. Numbers are filed with the State 4-H Office.
Management of Funds	9-V Responsibilities of 4-H YDP Staff		Yes - Conduct annual treasurer training. Collect and maintain records.	
4-H Unit/VMO Budgets	9-VII A Budgets 9-X Management of Excess Funds	Yes - Review annual budgets and approve annual carry forward and investment of funds, may be delegated to designee	Yes - Review annual budgets and submit to CD, highlighting any red flags and excess fund accumulation	
4-H Unit/VMO Fundraising	9-VII C Authorization for 4-H YDP Fundraising	Yes - Approve all fundraising activities, may be delegated to designee	Yes - Establish county review process and submit to CD for final review and approval. Monitor unit fundraising.	
Gifts to 4-H Units/VMOs	9-VII G Gifts to 4-H Units and VMOs	Yes - Review prior to acceptance any gifts over \$5,000	Yes - Inform and train volunteers on process	

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Chapter 9: Financial Management				
Theft and Mismanagement of funds	9-XI J Theft or Mismanagement of Funds	Yes - Report ASAP to the State 4-H Office	Yes - Monitor financials and notify CD of any red flags	Yes - Assist with the review of financials and report to the Controller's office
Property	9-XVII A Real Property 9-XVII B Other Property	Yes - Must approve the purchase or acceptance of real property, or the purchase of vehicles	Yes - Notify CD	
Annual Financial Reporting	9-XVIII Financial Reporting and Completion	Yes - Forms turned into CD, may be delegated to designee	Yes - Oversee process and support units/VMOs complete the annual process. Establish county deadlines. Ensure financial reporting forms turned into county office by September 15 — report any red flags to CD. Assure all required units and VMOs report into the financial reporting system and confirm by due date November 1st.	Yes - Review all required 4-H unit and VMO financial reports in online financial reporting system (November 2nd) provide follow-up to county staff with incomplete reports, submit final state 4-H reporting to UCOP by November 30th
4-H Unit/VMO Audits	9-XVIII C Financial Review Responsibilities and Requirements	Yes - May appoint peer review committee to oversee audits, may request independent audit and/or review by a CPA, may be delegated to designee	Yes - May request independent audit or review by a CPA of a unit or VMO	

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Chapter 10: Business, Insurance and Risk Management				
Hiring, Honoraria, and Contracts	10-II A Employees 10-II B Contracts	Yes - Follow UC ANR process	Yes - Follow UC ANR process	
Accidental Injuries or Death	10-V Reporting of Accidental Injury or Death	Yes - CD reports to Office of Risk Services	Yes - Report to CD and complete Incident Report Form	
Product Liability Insurance	10-VII Product Liability		Yes - Process request through Risk Service	
4-H Accident Insurance and Coverage & Claims	10-IX D Filling a Accident/Sickness Claim form 10-IX C Rental Vehicles 10-IX D County Cars	Yes - CD may authorize adult volunteer to use a rental vehicle or county vehicles	Yes - Process claim forms, complete Incident Report	
Facility Use	10-XII License Agreements for Use of Facilities (FUA)	Yes - Approve all use agreements	Yes - Prepare and forward to the CD	Yes - State 4-H YDP Director signs for all area and state use agreements
Retention of Records	10-XIV B Record Retention	Yes - May be delegated to designee	Yes - Follow established procedures	
Chapter 11: Health and Safety				
Establish & maintain healthy & safe environment for county 4-H YDP	11-II Role of 4-H YDP Staff		Yes - Provide training and resources to 4-H adult volunteers and members	

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Chapter 11: Health and Safety				
Child Abuse and Reporting	11-V Training of Child Abuse Reporting Procedures 11-VI Reporting of Child Abuse	Yes - Report suspected child abuse following UC reporting requirements	Yes - Report suspected child abuse following UC reporting requirements	
Search of Personal Property	11-VII D Documentation of Search		Yes - Submit Incident Report Form to the ANR Office of Risk Services. Forward report to the State 4-H Office.	
Treatment Authorization and Health History Forms	11-VIII D Steps for Handling 4-H YDP Treatment Authorization and Health History Forms		Yes - Follow steps outlined for handling forms	
Alcohol, Drugs and Tobacco	11-IX C Violations	Yes - May impose additional disciplinary action for violations		
Food Safety and Training	11-X Foods and Beverages		Yes - Conduct annual training for adult volunteers and staff involved with food service	
Purchase of Trailers	11-XXVI Trailers	Yes - Approve all trailer purchases	Yes - Assure procedures are followed	
Chapter 12: Collaborations and Relationships				
Collegiate 4-H	12-IX Collegiate 4-H		Yes - Notify State 4-H Office of interest in starting clubs	Yes - Authorized and administered by the State 4-H Office

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Chapter 13: Incentives and Recognition				
Record Book	13-VIII Notification of Expectations		Yes - Review and approve 4-H Record Book process and requirements	