Fee-based Instruction by Extension Faculty (for credit or non-credit)

The OSU Extension Service is committed to the goal of making OSU more accessible to Oregon residents. Integration of teaching and Extension programs to better serve our citizens’ needs is facilitated by this policy. Participation of Extension faculty in for-credit instruction or non-credit courses sponsored by our university and other collaborators provides an excellent opportunity for professional development and Extension program enhancement. In addition the recovery of costs can be a way to enhance Extension program delivery at the local level, since fees and/or salary savings are returned to the program area or possibly to the individual.

Fee based instruction represents an opportunity for Extension faculty to participate in credit or non-credit instruction where the client and/or the marketplace provide an opportunity to recover a substantial amount of the costs for the education provided. Fee based instruction generally goes beyond “traditional boundaries” of Extension programming and may be in partnership with OSU Extended Campus (EC) or some other collaborating institution.

For the purpose of this policy, for-credit courses include institutional course credit and EC credit. Approval for participation as an instructor is necessary as shown in the table at the end of this policy. For any fee-based instruction outlined in this policy, course service and supplies may in part or be totally supported by course fees.

Non-credit courses taught by Extension faculty but sponsored or co-sponsored by our university and other collaborators may be provided on a fee-for-service basis as appropriate for the audience, course objectives, and market. The fee may recover all or a portion of the cost of the course. Registration fees may be deposited in a workshop (self supporting) index to help pay for costs associated with the workshop, including compensation for instruction.

Compensation for instruction may take a variety of forms. The faculty member, in order to enhance program or to invest in professional development, may deposit funds in a workshop, development or professional development account for later use. Or salary costs can be “bought-out” for a period of time. If Extension salary costs are to be paid from a workshop index, approval and documentation similar to that outlined in the section on “Credit Course Instruction” must be followed. When charging for a non-credit course differs from standard, accepted practice or when it raises important issues relating to the relationship with the audience or community, use of faculty time, or the amount and/or use of the funds received, then prior approval of the immediate supervisor and program leader is required.

Credit Course Instruction by Extension Faculty
Presenting a guest lecture, serving on graduate committees, and supervising students is encouraged when it supports/complements Extension programming and when it is approved by the immediate supervisor and, if it requires a significant time commitment, the program leader.

Faculty members under the circumstances described below can accept primary responsibility for a credit course. However, state and federal Extension funds may not be used for salaries or expenses relating to the offering or conducting of college courses for credit. This is based upon the Smith-Lever Act as amended in August 1991 (Section 5): “No portion of said moneys shall
be applied directly or indirectly….

in college-course teaching, lectures in college, or any other purpose not specified in this Act.”

Extension faculty may assume primary responsibility for a credit course when it meets the following conditions and a formal request has been approved. Extension faculty may also serve as key members of a team that is planning, developing and leading a credit course. The process for team leadership is similar to individual leadership of a course. The formal request can be initiated by the faculty member or team, an OSU department, or another institution, and needs to contain:

1. The name of the faculty member or team, the name of the course, the duration of the course, the anticipated number of students, the number of contact hours, and other information important for determining the overall effort associated with the course.

2. The amount of salary and associated “other payroll expenses” (OPE) that will be transferred from the Extension index to the non-Extension index should be of a magnitude and duration that is appropriate or customary for the college or department offering the course.

3. A description of how non-extension funds will be used to support the teaching of the course.

4. A description of how the Extension savings will be used to maintain, strengthen, or enhance the Extension program.

5. A description of how the experience will enhance the Extension program and/or promote faculty member’s professional development.

6. The request must be submitted to and approved by the immediate supervisor and the appropriate program leader or designee.

In cases where another institution is involved the process can take several forms:

1. Develop an Intergovernmental Personnel Agreement (IPA). This may be a simple way to cover salary and OPE expenses with minimal overhead charges.

2. Follow a process similar to obtaining an outside grant or contract. The faculty member must submit a written proposal for approval from his or her college and the OSU Research Office. The proposal follows the same process used as when obtaining grant funds from outside sources (complete the blue “Check-Off Sheet” from the Research Office). Faculty also should contact the appropriate OSU department to have it determine if OSU credit might be offered. In this case, the department works with the EC Office.

Upon approval, it is the responsibility of the program leader or designee to assure that appropriate forms are completed to transfer salary and OPE expenses to the appropriate account.
Extension salary savings and OPE created by the reduction of Extension FTE will be returned to the program area as described in the “Priority Staffing and Vacancy Management” policy.

**Offering Credit for an Extension Course**

Some participants in more formal Extension courses (such as the Master Gardener Program) may wish to earn university credit for their participation. This is encouraged as it increases Extension’s ability to serve the broader mission of the University and it may promote service to more audiences.

Through the involvement of the appropriate OSU department and/or the EC Office, it may be possible for some participants to earn credit after completing course requirements, but the for-credit option must be arranged in advance. In this case, a non-Extension source of salary and OPE funding is not required. The need for non-Extension salary and OPE funding is based on the primary audience. If the program is based on a traditional Extension program that is expanding to include a for-credit option, then a reduction in Extension FTE is not required. However, if the program is developed primarily for students desiring credit and that is the primary audience, a reduction in Extension FTE is required. Often there are University fees for issuing and recording official credit that will need to be collected when participants chose to receive credit for a course.

The awarding of certification and continuing professional units for completion of Extension courses is consistent with the provisions of the Smith-Lever Act and does not require a reduction in Extension FTE, but if fees are collected for instruction, a written agreement is required.

**Teaching as an Outside Professional Activity**

Extension faculty wishing to teach at another institution are subject to the “OSU Policy on Outside Professional Activities (1998)” (http://oregonstate.edu/research/RegulatoryCompliance/outside.html). Also consult “The Extension Guidelines on Outside Professional Activities.”

**Compensation for Overload Assignment**

In cases where the teaching is being done as part of an OSU program and the work is above the faculty member’s regular duties, an overload compensation may be approved. Refer to http://oregonstate.edu/facultystaff/handbook/consult/consultall.htm (College/Unit approval is required)

<table>
<thead>
<tr>
<th>Function</th>
<th>Primary responsibility</th>
<th>Approval</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest lecturer, graduate</td>
<td>Faculty member</td>
<td>Immediate supervisor, program leader</td>
<td>Compensation options: Buy-out of salary or contribution to workshop, development or professional enhancement index.</td>
</tr>
<tr>
<td>Committees, intern supervision</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Noncredit instruction with faculty cost recovery</td>
<td>Faculty Member</td>
<td>Immediate Supervisor and program leader or designee</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Responsible Party</td>
<td>Relevant Parties</td>
<td>Notes</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------</td>
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<td>--------------------------------------------</td>
</tr>
<tr>
<td>Proposal for primary responsibility to teach non-OSU course for credit</td>
<td>Faculty member</td>
<td>Immediate supervisor, program leader, IPA or proposal blue sheet which includes academic home dept. head, dean and Research Office</td>
<td>Requires a buy-out of salary and OPE</td>
</tr>
<tr>
<td>Proposal for primary responsibility to teach OSU course for credit</td>
<td>Faculty member</td>
<td>Immediate supervisor, program leader</td>
<td>Requires a buy-out of salary and OPE</td>
</tr>
<tr>
<td>Labor distribution form</td>
<td>Immediate supervisor/ program leader with help from Personnel Office</td>
<td>Extension Dean Academic home Dean</td>
<td>This is a follow-up paperwork to the 3 options immediately above.</td>
</tr>
<tr>
<td>Offer of Extension program for credit</td>
<td>Faculty member</td>
<td>Consistent with University policies</td>
<td>Coordinate effort with immediate supervisor/ dept. head/ program leader/ Extended Campus</td>
</tr>
<tr>
<td>Compensation for Overload Assignment</td>
<td>Faculty member</td>
<td>Program Leader or designee/immediate supervisor</td>
<td></td>
</tr>
</tbody>
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