



## Unit Leadership: Best Practices for Local Budgets

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### Introduction

Unit-level leadership positions within Virginia Cooperative Extension (VCE) carry a wide range of responsibilities. This publication draws from an online seminar series featuring unit leaders from across the state who share their insights, experiences, and guidance on key issues they manage as Unit Coordinators (UCs) or Unit Extension Directors (UEDs).

The content presented here - and in the accompanying tipsheets - is distilled from the *UC Best Practices* seminar series. It is intended to provide practical recommendations and strategies for individuals serving in unit leadership roles.

One key responsibility of VCE unit leader positions is preparing, submitting, and obtaining approval for local budget requests. UCs/UEDs must also manage locally appropriated funds in full compliance with Virginia Tech (VT) and VCE policies and procedures.

### Best Practices

- View budget discussions as an opportunity to showcase VCE programs to local officials.
- Establish a relationship with the local budget department to understand their process.
- Hold monthly budget meetings with the local budget department.
- Utilize salary savings effectively.
- Use performance measures and data to support budget requests.
- Request quarterly budget updates from the Administrative & Fiscal Assistant (AFA) for team awareness.

### Challenges

- Getting on the radar of county officials.
- Understanding the county budget process and maintaining regular meetings.
- Communication gaps created by being a state employee, not receiving local communications.
- Gaining access to attend and observe budget meetings.
- Navigating funding requests from external entities like 4-H centers.

### Practices to Avoid

- Requesting funds without supporting data and justification.
- Requesting funds without VCE's knowledge or support, or without VCE guidance on wording.
- Remaining unnoticed or 'flying under the radar'.
- Ignoring the current budget environment when making requests.

### Support Needs

- Clearly defining the roles of AFA and UC as related to local budget responsibilities.
- Training that instructs units on Full Time Employee (FTE) requests to the locality.
- Shared files that provide budget examples from other units.
- Guidance on reasonable budget allocations for travel and professional development.
- Need consistent guidance from DDs/Admin on how to request new state positions, local positions, and grants that go through the locality.

# References

Hunnings, J., S. Mahdu, and A. Wood (2021). *VCE Unit Coordinators Responsibilities*. VCE Intranet <https://drive.google.com/file/d/1hXHOySto9HLCyYfj7-1Az7VWhTdNhgWs/view>

Hunnings, J., S. Madhu, and A. Wood (2021). *VCE Unit Coordinator Checklist*. VCE Intranet, <https://drive.google.com/file/d/1g-F5FW8x0SRmANJaZ4u2WjACMlsaVTSC/view?usp=sharing>

VCE Funds Handling Policies & Procedures Folder: <https://drive.google.com/drive/folders/0AD1UtOxkKxcgUk9PVA>

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