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# University Extension and Volunteerism Operations Manual

2nd Revision

## and Implementing Procedures

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## TARLAC STATE UNIVERSITY BOARD OF REGENTS RESOLUTION APPROVING THE PROPOSED AMENDMENTS OF THE UNIVERSITY EXTENSION AND VOLUNTEERISM OPERATIONS MANUAL

**EXCERPTS FROM THE MINUTES OF THE REGULAR MEETING OF THE BOARD OF REGENTS (BOR) MEETING OF TARLAC STATE UNIVERSITY, HELD ON 08 JUNE 2026, AT THE COMMISSION ON HIGHER EDUCATION (CHED), HEDC BUILDING, C.P. GARCIA AVENUE, UP DILIMAN CAMPUS, QUEZON CITY**

**RE: Board Approval of the Proposed Amendments to the Office of University Extension Services (OUES) Operations Manual and Renaming to University Extension and Volunteerism Operations Manual**

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Upon the approval of the Board of Regents, the following was passed:

**TSU Board Resolution No. 81**
**Series of 2026**

A RESOLUTION APPROVING THE **AMENDMENTS TO THE OFFICE OF UNIVERSITY EXTENSION SERVICES (OUES) OPERATIONS MANUAL AND THE RENAMING OF THE MANUAL TO THE UNIVERSITY EXTENSION AND VOLUNTEERISM OFFICE MANUAL**

**WHEREAS**, Tarlac State University (TSU) recognizes the importance of regularly revisiting and updating its policies to align with the evolving landscape of extension mandates and the mainstreaming of volunteerism within the institution;

**WHEREAS,** the Office of University Extension Services (OUES) has proposed comprehensive amendments to its Operations Manual to ensure compliance with the latest SUC Leveling Guidelines, SUC Faculty Reclassification Guidelines, and policies from the Commission on Higher Education (CHED) and the Department of Budget and Management (DBM);

**WHEREAS,** the proposed revisions also incorporate guidelines from the Philippine National Volunteer Service Coordinating Agency (PNVSCA) to further strengthen the University's commitment to volunteerism;

**WHEREAS,** to better reflect the expanded scope of its functions and the integration of volunteer-led initiatives, the proponent has requested the formal renaming of the "Office of University Extension Services Operations Manual" to the "University Extension and Volunteerism Office Manual".

**WHEREAS,** the Board of Regents approves the Proposed Amendments to the OUES Operations Manual and the renaming of the Manual to the University Extension and Volunteerism Office Manual.

**NOW, THEREFORE, BE IT RESOLVED, AS IT IS HEREBY RESOLVED,** that the Board of Regents of Tarlac State University hereby approves TSU Board Resolution No. 81, s. 2026, which approves the Proposed Amendments to the OUES Operations Manual and the renaming of the manual to the University Extension and Volunteerism Office Manual.

**Approved and Adopted this 08th day of June 2026 during the 141st Regular Meeting of the Board of Regents of Tarlac State University, held at CHED Central Office, HEDC Building, C.P. Garcia Avenue, UP Diliman Campus, Quezon City.**

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Chairperson, Commission on Higher Education
Chairperson, TSU Board of Regents

**HON. JASPER JAY N. MENDOZA**
President, Tarlac State University
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Senate Committee on Higher
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President, TSU Alumni Association, Inc.
Member, TSU Board of Regents

**HON. BRIXTER L. MILLO**
President, TSU Student Supreme Council
Member, TSU Board of Regents

**Certified true and correct:**

**RONNIE A. DUNGO**
OIC- Board Secretary

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BY: W. CALMA

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## FOREWORD

As one of the major functions of a higher education institution, extension plays a crucial role in the development of communities, especially the underserved and underprivileged. In order to successfully fulfill its extension mandate, the Tarlac State University ensures that its extension systems function effectively and efficiently. Additionally, volunteerism serves as a strategy to further strengthen and extend the reach of the extension services of the University. In the same vein, the University ensures that a volunteering infrastructure is in place to support volunteerism mainstreaming.

In this rapidly evolving world filled with obstacles, challenges, and conflicting perspectives, it is imperative that policies, guidelines, and processes pertaining to extension and volunteerism operations and service delivery are regularly reviewed, amended (if necessary), and properly disseminated.

The amended University Extension and Volunteerism Operations Manual prepared by the Office of University Extension Services and approved by the TSU Board of Regents shall serve as a guide for key officials, extension personnel, extensionists, volunteers, and external stakeholders as they navigate through the complex pathways of extension and volunteerism operations and service delivery, ensuring that every concerned individual or entity is on the same page.

Armed with the necessary competence and guided by a standard policy and a collective vision of development, it is hoped that relevant and sustainable extension and volunteer programs and projects will be developed and implemented with the goal of creating lasting impact on communities and individuals.


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**Brief History of TSU Extension Services**

Extension as an institutional function in the Tarlac College of Technology (the name of Tarlac State University between 1965 and 1989) started sometime in 1974 with the Extramural Studies and Extension Services (ESES) under the stewardship of Mr. Jose Lacson. Its main program component was Rural Life Development housed under the Institute of Rural Life Development (later renamed as Institute of Rural Life Technology), which offered a four-year secondary agriculture-based program in 1975. Graduates of the program were encouraged to enter into a two-year vocational course, which was also agriculture-based, a response to the government's thrust of promoting agricultural development in the countryside under the *direction of Prof. Rizal V. Ganiban.*

In 1983, the ESES was re-established as a separate office directly under the College President with Professor Adoracion Y. Nogoy as head. It offered non-formal education programs that aimed to help the out-of-school youth, continuing education, and special projects to enhance other sectors' effectiveness. The office was also tasked to monitor income-generating projects of the college. Believing that extension is not only for outside clients, projects like success lessons and evaluation for the faculty and staff were also initiated and taken care of by the office.

When Dr. Ernesto Cosme was appointed as the OIC President of Tarlac State University in 1992, extension and research were merged into one office under the leadership of Prof. Nogoy. Upon the appointment of Dr. Alejandro Fernandez as President of the University, the leadership of the extension and research office was transferred to Dr. Alfredo M. Conte after the retirement of Prof. Nogoy. When Dr. Rodolfo Baking took over the University presidency in 1995, he separated research and extension. Research was placed under the leadership of Dr. Victoria Gengania, while Dr. Conte continued to serve as the Director of the University Extension Office (UEO). This led to the designation of extension chairpersons to take charge of the various extension functions, areas of concern and programs, along with the designation of college extension coordinators whose main function was to link the University Extension Office and the different colleges. Extension initiatives were undertaken in collaboration with civic organizations, religious organizations, and local government units.

Upon Dr. Conte's retirement, Dr. Glenard T. Madriaga took over the leadership to continuously extend quality extension services by sharing the University's expertise to uplift the socio-cultural, technological, educational, and environmental conditions of the populace towards sustainable development. Under his leadership, the University Extension Manual was approved by the Board of Regents under Resolution No. 39, series of 2008, dated June 9, 2008.

Dr. Madriaga's appointment as Vice President for Research, Extension, and Development in 2008 led to Prof. Redemptor G. Toledano's designation as Director of the UEO after serving as Cluster Chairman for Consultancy and Special Projects. Under Prof. Toledano's term, the office was renamed as University Extension Services Office and the services delivered were organized and clustered under five university extension programs, namely: the Community Development Program, which assists in identifying the needs of a community and matching these with the capabilities of the institution; the Industry *Development Extension Program, which is aimed at providing services to small and medium enterprises to* increase their productivity; the Institution-Public-Private Sector Partnership Program; the Extension Support Services Program (ESSP); and the Student Extension Experience Program. It was also during the leadership of Prof. Toledano that the operations of the office was certified to ISO 9001:2008 (Quality Management System). The University Extension Manual was then converted into the TSU Extension Services Guide under BOR Resolution No. 66, series of 2009, dated November 4, 2009. Fast forward to 2017, the office's ISO certification was migrated to ISO 9001:2015 and was maintained until the end of the term of Prof. Toledano in June 2020.

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In 2016, the office established the Professional Development Services (PDS) Program which was an income-generating arm that helped professionals enhance their level of professionalism and integrity through training and consulting activities. In the following year, the BOR approved the establishment of the Regional Center on Resources and Development of Indigenous Peoples (RCRDIP) to *provide technical support for protecting and promoting indigenous cultural communities' interests and well-*being indigenous peoples. The UESO managed the center.

With the retirement of Prof. Toledano, Engr. Emir Lenard S.F. Sicangco, previously the Head of the ESSP (2008-2016) and then Director of the Technology Development, Transfer and Commercialization Office, assumed leadership as the concurrent OIC Director of the UESO from June 2020 to October 2021. Under the leadership of Engr. Sicangco, the UESO was renamed into the Extension

Services Management Office (ESMO) with the following units: Planning and Monitoring Unit, Project Management Unit, Extension Affairs Unit, and the Extension Studies and Publication Unit. During his stint, which coincided with the height of the Covid-19 pandemic, the ESMO was awarded 2nd Place in terms of Extension Best Practices and Initiatives in Mitigating the Effects of the Covid-19 Pandemic during the Central Luzon-wide celebration of the 1st National Higher Education Day and 27th Founding Anniversary of CHED held in May 2021. In December 2021, the ESMO was declared as one of five winners in the Development Academy of the Philippines' Government Best Practices Recognition for its Project Monitoring, Evaluation, and Reporting System, which is an information system developed specifically for managing extension documents and information.

From October 2021 to August 2023, Dr. Lea B. Milan served as the OIC Director of the ESMO. Under her leadership, the office had shifted its gear to strengthen the capacity of the colleges in producing impactful and sustainable "*tatak* TSU" long-term extension projects or the so-called Community Development Extension Programs and Projects (CDEPP). The CDEPP aimed to implement reform-oriented and impact-driven extension projects of the colleges and offices in partnership with various community and industry sectors. Working in collaboration with diverse community and industry sectors, the initiative also aimed to identify and address the specific needs of communities and bridge them with the institution's capabilities. In response to addressing the mandates of the University towards community development, new extension programs were also developed — the Community Outreach Program and Extension Advocacy Program. In addition, the ESMO was renamed into the Office of University Extension Services in April 2023 with the following departments: Extension Services Management Department, Extension Planning and Performance Management Department, University Extension Affairs and Linkages Department, and Technology and Knowledge Management Department.

Recognizing the escalating demand for the expertise of the colleges, the OUES also took the initiative to fortify and operationalize the college extension department in each college. This crucial step addressed the challenges posed by the surge in stakeholders seeking assistance from the colleges, ensuring that the office effectively responds to their evolving demands and the ever-changing needs of the community. By doing so, the office sought to elevate the development of sustainable and enduring extension programs, thereby making a lasting positive impact on the communities served.

In August 2023, Engr. Emir Lenard S.F. Sicangco was reinstated as OUES Director. During his tenure, the University strengthened its commitment to volunteerism and community engagement through the signing of a Memorandum of Agreement with the Philippine National Volunteering Service Coordinating Agency (PNVSCA). As a result, the OUES was designated as the University's Volunteerism Focal Office, while Director Sicangco was appointed as the Volunteer Focal Person. Furthermore, the establishment of the Volunteerism Management Department (VMD) was approved through TSU Board Resolution No. 39, series of 2025. Subsequently, Board Resolution No. 73, series of 2025, authorized the University President to approve future extension and volunteer programs and projects, thereby streamlining the implementation and management of the University's extension and volunteerism initiatives.

In late 2025, the Social Action on Relief and Assistance Program (SARAP) Tumulong was revived as the University's flagship non-expertise-based outreach program. The initiative aims to provide immediate assistance to communities and groups affected by calamities and disasters, experiencing poverty, or otherwise facing socioeconomic disadvantages. Through SARAP Tumulong, the University extends various forms of non-technical and short-term assistance in support of community welfare and social responsibility.

Further strengthening the University's extension and volunteerism framework, the TSU Board of Regents approved Resolution No. 81, series of 2026, which amended the OUES Operations Manual and officially renamed it as the University Extension and Volunteerism Operations Manual. This milestone institutionalized the integration of volunteerism into the University's extension mandate and reinforced its commitment to responsive and sustainable community engagement.


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## Chapter I. Preliminary Matters

**Section 1. Title, Coverage, and Interpretation**

a. This document shall be called the "University Extension and Volunteerism Operations Manual."

b. This manual shall govern all extension and volunteerism-related matters, including extension and volunteer programs, projects, and activities of Tarlac State University (TSU).

c. The provisions contained herein shall be liberally construed in order for TSU to fulfill its extension mandate.

**Section 2. Legal and Institutional Framework.** This Operations Manual is based on several mandates and frameworks as embedded in legislative acts, executive issuances, and as enshrined in the university's vision and mission statements.

**a. 1987 Constitution of the Republic of the Philippines.** The Constitution mandates the state to "encourage non-formal, informal, and indigenous learning systems, as well as self-learning, independent, and out-of-school study programs particularly those that respond to community needs" (Article XIV Section 2.4).

**b. Republic Act No. 7722.** RA 7722, or the Higher Education Act of 1994, orders "state-supported *institutions of higher learning to gear their programs to national, regional or local development* plans" (Section 2).

**c. Republic Act No. 8292.** Also known as the "Higher Education Modernization Act of 1997," RA 8292 mandates chartered state universities and colleges (SUCs), through their governing boards, to establish research and extension centers that will promote their development (Section 4m).

**d. Republic Act No. 6764.** RA 6764, which refers to "An Act Converting the Tarlac College of Technology into a State University to be known as the Tarlac State University (TSU)", states that "the University shall provide advanced instruction in literature, philosophy, the sciences, and the arts and shall also offer professional and technical training courses" (Section 2).

**e. Republic Act No. 11695.** This refers to the revised Tarlac State University Charter, which further *reiterates the mandate of Tarlac State University, as a chartered state university, to establish* research and extension centers through its governing board (Section 4k) and undertake research and extension services and provide progressive leadership in its areas of specialization (Section 2).

f. **Republic Act No. 9418.** RA 9418, otherwise known as the "Volunteer Act of 2007" states that volunteerism in the academe includes, but is not limited to, provision of technical assistance and sharing of technology within the academic circle, target communities and other clienteles and the upgrading of the quality of education and curriculum methodologies while providing career enhancement and exposure to the volunteers (Section 5a).

g. **Republic Act No. 11032.** RA 11032, or the "Ease of Doing Business and Efficient Government Service Delivery Act of 2018," mandates government agencies to "maintain honesty and *responsibility" among employees and "take appropriate measures to promote transparency... with* regard to the manner of transacting with the public... that will reduce red tape and expedite business and nonbusiness related transactions in government" (Section 2).

**h. Republic Act No. 10173.** RA 10173, also known as the "Data Privacy Act of 2012," emphasizes "the inherent obligation of government agencies to ensure that personal information in information and communications systems in the government and in the private sector are secured and protected" (Section 2).

**i. Executive Order No. 605.** EO 605 orders for "Institutionalizing the Structure, Mechanisms, and Standards to Implement the Government Quality Management Program, amending for the Purpose Administrative Order No. 161, s. 2006" and likewise enjoins SUCs to establish ISO Quality Management Systems (ISO-QMS) and be certified accordingly.

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j. **DBM-CHED Joint Circular No. 3, series of 2022.** This refers to the guidelines on the reclassification of faculty positions in state universities and colleges, which details the extension indicators that faculty members may accomplish in order to be reclassified to a higher academic rank.

k. **National Budget Circular No. 598, series of 2025.** This circular concerns the second phase of the revised organization and staffing standards for state universities and colleges, which includes dedicated plantilla positions for extension.

l. **CHED Memorandum Order (CMO) No. 20, series of 2011.** This CMO pertains to the policies and guidelines for the use of income, special trust fund, and program of receipts and expenditures of the state universities and colleges, including those for the extension mandate.

m. **CHED Memorandum Order No. 18, series of 2025**. This refers to the revised guidelines and instruments for client satisfaction survey of extension projects in state universities and colleges *pursuant to DBM-CHED Joint Circular No. 3, series of 2022*.

**Section 3. The Extension Mandate**. Extension is one of the fourfold functions of higher education institutions. It refers to the act of communicating and transferring knowledge and technology to specific sectors and target clienteles (as distinguished from those enrolled in formal degree programs and course offerings) to enable them to effectively improve production, community and/or institutions, and quality of life, at the same time enhance the HEI's academic and research programs (Commission on Higher Education, 2010).

**Section 4. Volunteerism Mainstreaming in the Academe.** Mainstreaming volunteerism in the academe is the systematic integration of volunteerism in the major mandates or core functions of higher education institutions. Volunteerism mainstreaming involves putting in place the volunteering infrastructure of the institution in order to support the implementation of various initiatives along instruction, research, and extension, among others.

**Section 5. List of Acronyms Used**

| | |
|---|---|
| BOR | Board of Regents |
| CEDH | College Extension Department Head |
| EAC | Extension Advisory Council |
| EALD | Extension Affairs and Linkages Department |
| ESCE | Extension Service and Community Engagement |
| MOA | Memorandum of Agreement |
| MOU | Memorandum of Understanding |
| MSME | Micro, Small, and Medium Enterprises |
| NGA | National Government Agency |
| NGO | Non-Government Organization |
| LGU | Local Government Unit |
| OUES | Office of University Extension Services |
| OUP | Office of University President |
| PCD | Publication and Communication Department |
| PNVSCA | Philippine National Volunteer Service Coordinating Agency |
| PPMD | *Planning and Performance Management Department* |
| PPMP | Project Procurement Management Plan |
| TSU | Tarlac State University |
| VMD | Volunteerism Management Department |
| VPRIE | Vice President for Research, Innovation and Extension |

**Section 6. Definition of Terms**

**Activity** – An "element of work performed during the course of a project" [or program] (Simon Fraser University, n.d.).

**Beneficiary** – generally refers to the recipient of an extension or volunteer service

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**Client** – a person or entity that may have a greater stake at decision making in the extension or volunteer service than a typical beneficiary or pays for the services received

**Credit Hours** – the number of hours earned by an extensionist or volunteer for the actual delivery of an extension or volunteer service; excludes the time spent on preliminary and post-implementation activities such as meetings, signing of agreements, travel to the extension site, document preparation, and other similar activities

**Extension Affairs and Linkages** – apart from extension services (see definition below), these involve *seeking, establishing, and maintaining mutually beneficial relationships with internal and external* stakeholders through the conduct of and participation in activities that will ultimately contribute to the fulfillment of the extension mandate of the University

**Extension and/or volunteer service** – umbrella term used to refer to a program, project, or activity that is delivered for the development of specific sectors and the improvement of the quality of life of underserved and underprivileged populations

**Extensionist** – a University employee (faculty or non-academic personnel) who provides an extension service

**External funding agency** – An agency or institution external to the University which provides funding for the implementation of various programs, projects, and activities

***Physical Resources*** – *the facilities, equipment, and supplies procured by and/or donated to the University* for extension-related purposes.

**Program** – A "portfolio comprised of multiple projects [and/or activities] that are managed and coordinated as one unit with the objective of achieving outcomes and benefits for the organization" (Alonzi, n.d.); a program shall comprise at least three (3) projects

**Program Structure** – An extension program without specific details of implementation (e.g. confirmed activities, extensionists, dates of implementation, etc.) at the time of proposal; it is proposed for the purpose of accommodating requests for one-shot extension or volunteer services that would not qualify as a standalone program or project; once activities are lodged under the program structure, the latter becomes an actual extension program; must be aligned with the curriculum for academic program-based proposals and function/s for office or center-based proposals

**Project** – A "temporary entity established to deliver specific outputs in line with predefined time, cost and quality constraints" (Alonzi, n.d.). An extension or volunteer project shall comprise activities with a minimum combined duration of 40 hours

**Proponent** – An entity or individual that has the primary responsibility of proposing and/or implementing an extension or volunteer service, or any authorized representative

**Volunteer** – an individual or group who for reasons arising from their socio- developmental, business and corporate orientation, commitment or conviction, contribute time, service and resources whether on full-time or part-time basis to a just and essential social development cause, mission or endeavor in the belief that their activity is mutually meaningful and beneficial to public interest as well as to themselves (Volunteer Act of 2007). However, a University employee or a student shall only be referred to as a volunteer if the activity is rendered beyond the mandated extension service or outside of academic requirement, *respectively*.

**Volunteerism** – an act involving a wide range of activities, including traditional forms of mutual aid and developmental interventions that provides an enabling and empowering environment both on the part of the beneficiary receiving and the volunteer rendering the act, undertaken for reasons arising from socio-developmental, business or corporate orientation, commitment or conviction for the attainment of the public good and where monetary and other incentives or reward are not the primary motivating factors (Volunteer Act of 2007). In the University context more specifically, volunteerism shall be considered as an act which may fall under the broader field of extension services but undertaken beyond the mandated extension service of employees or outside the academic requirement of students.

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## Chapter II. University Vision, Mission, Core Values, and Strategic Direction

**Section 1. Vision.** A globally competitive university recognized for excellence in sciences and emerging technologies

**Section 2. Mission.** TSU shall develop highly competitive and empowered human resources fostering responsive global education, future-proof research culture, inclusive and relevant extension programs, and sustainable production projects.

**Section 3. Core Values**

T – Truth in words, action, and character
S – Service with excellence and compassion
U – Unity in diversity

**Section 4. Quality Policy.** Tarlac State University is committed to continuously strive for global competitiveness and excellence in the delivery of instruction, research, extension (training and consultancy), and administrative support services, compliant to regulatory and statutory requirements for the utmost satisfaction of its valued customers while ensuring safe and healthy working conditions for its students, employees, clientele and reducing environmental impact of its operations.

**Section 5. Quality Objective.** To uphold the commitment to its policy, TSU shall attain the following objectives:

a. strive for global competitiveness and excellence in the delivery of
    i. instruction
    ii. research
    iii. extension (training and consultancy services) and
    *iv. administrative support services;*
b. attain utmost satisfaction of customers and interested parties;
c. comply with the standards set by statutory, regulatory, and accrediting bodies; and
d. maintain and continually improve the implementation of its quality management system.

**Section 6. Strategic Directions**

S – Sustainable student support programs to improve access to quality education to become globally competitive.
O – Outstanding international reputation and visibility through Academic and Research Exchanges.
A – Assurance of quality and excellence through accreditation, assessment, and certification with global standards
R – Rigorous Development Programs for executives, faculty, staff, and students
H – Highly responsive and innovative Research Development and Extension programs.
I – Investment on modern Infrastructures, facilities and equipment to ensure inclusive and responsive delivery of services to clients and stakeholders.
G – Good governance, management, and accountability characterized by Truth Service and Unity.
H – Harness active partnerships and collaboration to local and international community.
E – Enhanced Production through Sustainable Income Generating Projects.
R – Responsive, Innovative and Industry-based Curricula and Instruction


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## Chapter III. Office of University Extension Services

### Section 1. Goals and Objectives

a. **Goal.** The OUES shall strive for the continuous improvement of the university's extension and volunteerism management system and its extension and volunteer services to create lasting impact among its clients.

b. ***Objectives.*** *The OUES shall work towards the attainment of the following objectives every* applicable rating period:

1. Consistent increase in the number of extension and volunteer programs organized and supported consistent with the University's mandated and priority programs.
2. Consistent increase in the number of trainees weighted by the length of training.
3. Consistent increase in the number of active partnerships as a result of extension and volunteer services.
4. 100% of beneficiaries rate the training courses as satisfactory or higher in terms of quality and relevance.
5. Review and/or updating of extension and volunteerism policies, programs, agenda, and organizational structure.
6. At least 90% utilization of the allocated funds for extension.
7. *At least 75% involvement of plantilla faculty and non-teaching personnel in ESCE.*
8. At least 75% involvement of students in ESCE.
9. At least 5 training activities conducted derived from research outputs.
10. At least 3 technologies demonstrated derived from research outputs.
11. At least 6 technical advisories delivered derived from research outputs.
12. At least 5 outreach activities conducted derived from research outputs.
13. At least 8 extension activities delivered via alternative modalities.
14. At least 4 technologies or innovations by faculty and/or students through research adopted or commercialized.
15. At least 2 ordinances, resolutions, policies and other equivalent issuances passed or approved resulting from technology or innovation introduced by the University.
16. At least 6,500 stakeholders trained on need-based training programs.
17. At least 2 impact assessments conducted by external experts.

### Section 2. Functions

a. **General Function.** The general function of the OUES is to manage the achievement of the University's Extension agenda and targets towards the realization of the University's extension mandate.

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b. **Specific Functions**

1. Prepare the extension and volunteerism development plan, strategic and action plans, budget plan, and procurement plan of the University.
2. Cascade extension targets to colleges, offices, and centers.
3. Implement capacity development activities for extension personnel, extensionists and volunteers.
4. Provide technical assistance to University employees and students in relation to the development of extension and volunteer service proposals and other matters pertaining to extension and volunteerism.
5. Facilitate the establishment of linkages and partnerships with industries, government agencies, NGOs, communities, and individuals on extension and volunteerism.
6. Facilitate and/or undertake the evaluation and processing of extension and volunteer service proposals.
7. *Oversee the implementation of approved extension and volunteer services.*
8. Monitor the attainment of the extension targets of the University and of the colleges, offices, and centers.
9. Prepare reports required by internal and external interested parties.
10. Manage extension and volunteer service documentation.
11. Develop and/or disseminate extension and volunteerism-related information materials through various platforms.

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12. Propose and/or implement policies, procedures, and guidelines to ensure the continual improvement of the extension function of the University.

**Section 3. Logo.** The OUES logo features a central design of a five-lane road symbolizing the journey towards progress. Each lane represents a key social institution that serves as a partner in development, namely, family, academe, government, industry and religion.

The colors of the lanes represent the physical components of the natural environment with man as a steward. Gold represents man; blue signifies water; white symbolizes air; green denotes life forms; and brown stands for the earth.

Along the path, symbols from the TSU logo—the triangle, sun, and hands—are incorporated to highlight the University's commitment to guiding and supporting the achievement of the development goals for Tarlac Province and the country, in collaboration with the social institutions.

The circular shape of the logo has two symbolisms: first, infinity or endlessness, signifying the University's unending commitment to fulfilling its extension mandate; and second, the earth's shape, denoting the University's vision of internationalizing its extension mandate.

Figure 1
OUES Logo Formats




(a) Colored




(b) Monochrome

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**Section 4. Organizational Structure, Duties, and Responsibilities**

a. **Structure.** The OUES shall be part of the bigger extension organizational structure which shall be governed by the Board of Regents and headed by the University President. It shall operate directly under the Office of the Vice President for Research, Innovation, and Extension. The office shall be composed of a director holding a faculty plantilla item; heads who shall supervise BOR-approved departments; technical staff under each department; and support staff. Also part of the extension organizational structure are the following who shall perform extension-related duties and responsibilities but shall remain administratively under their respective colleges, offices, and centers: the Extension Advisory Council; college-based extension department heads and college technical staff; and extensionists and volunteers (see Figure 2).

b. **University President.** In relation to extension and volunteerism, the University President shall

   1. provide overall direction towards the realization of the extension function of the University;
   2. endorse requests for extension and volunteer service to the concerned Vice President; and
   3. approve extension and volunteerism-related matters and documents such as, but not limited to, extension and volunteer service proposals, reports, requests, policies, and procedures.

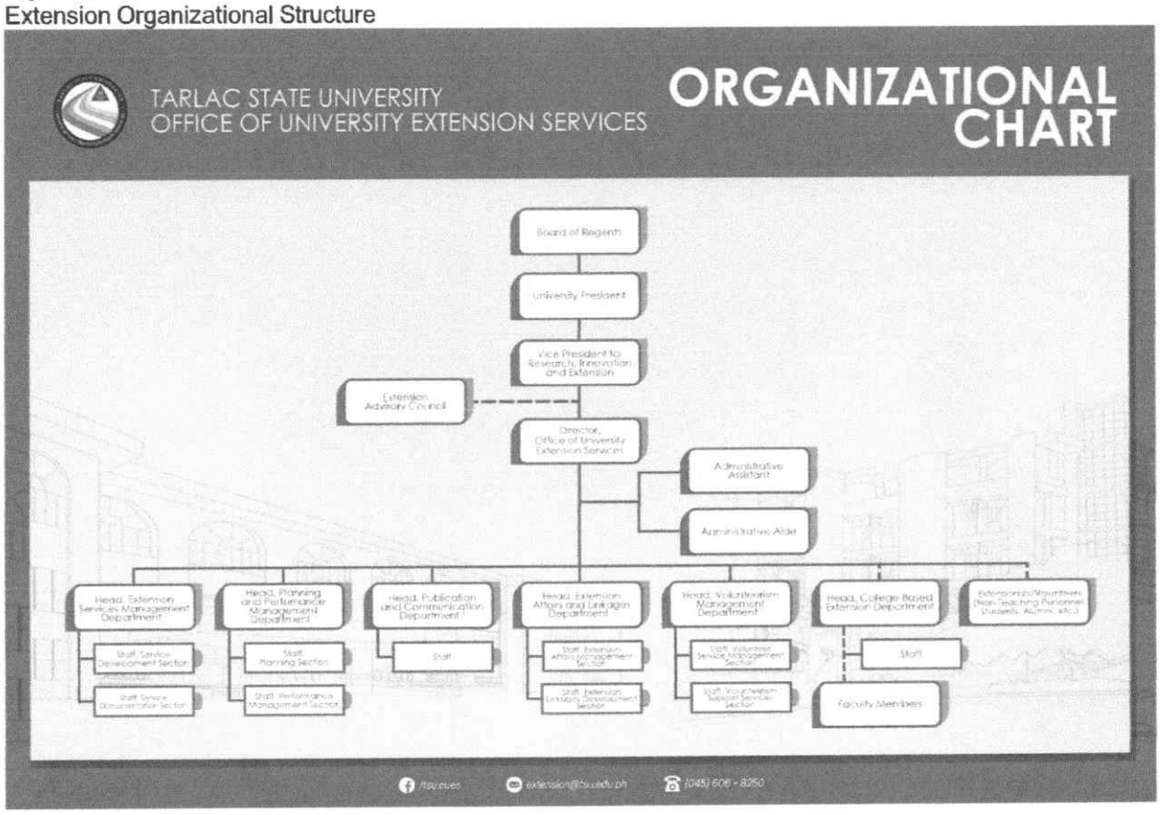
c. ***Vice-President for Research, Innovation and Extension***. *In relation to extension and* volunteerism, the VPRIE shall

   1. provide technical advice and assistance to the OUES;
   2. review policies, procedures, proposals, reports, and requests prepared and submitted by the OUES; and

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3. recommend to the University President the approval of extension and volunteerism-related matters and documents such as, but not limited to, extension and volunteer service proposals, reports, requests, policies, and procedures.

Figure 2
Extension Organizational Structure




**d. Extension Advisory Council**

1. **Composition.** The EAC shall be composed of the following:

| | |
|---|---|
| Chair: | Vice President for Research, Innovation and Extension |
| Vice Chair: | Vice President for Academic Affairs |
| Members: | Vice President for Administration |
| | Director, Office of University Research Development |
| | Director, Office of University Extension Services |
| Secretariat: | OUES Staff |

2. **Duties and Responsibilities**
   a. Assist in setting directions, planning, and allocating funds for extension and volunteerism.
   b. Review the extension priorities and agenda of the University.
   c. Formulate, review and/or recommend extension and volunteerism-related policies, procedures, and guidelines.
   d. Evaluate and recommend for approval selected extension and volunteer service proposals.

e. **Director.** The director shall fulfill the duties and responsibilities specified below.

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1. Oversee the overall operations of the office.
2. Facilitate the development, review, and/or revision of the University extension agenda and extension and volunteerism-related plans.
3. Organize capacity development activities for extension personnel, extensionists, and volunteers.
4. Connect with various stakeholders for potential partnerships, funding, and/or collaborations.

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5. Evaluate extension and volunteer service proposals.
6. Prepare or review reports required by internal and external stakeholders.
7. Assist in addressing relevant concerns.
8. Represent the office and the University in relevant internal and external activities or committees, respectively.
9. Provide guidance in the development and dissemination of relevant information materials.
10. Provide inputs towards the improvement of relevant policies, procedures, and guidelines.
11. Perform other duties and responsibilities as may be assigned.

f. **OUES Department Heads.** OUES department heads shall directly report to the director and perform the duties and responsibilities enumerated below.

**1. Extension Service Management Department**

a. Supervise the evaluation and monitoring of the completion of the extension *services of the colleges, centers and offices*.
b. Facilitate the approval process of extension project proposals.
c. Undertake necessary actions on the extension service proposals with concerns.
d. Communicates results of the proposal evaluation and monitoring activities.
e. Provide technical assistance and guidance to extension service providers on extension project documentation concerns.
f. Manage the department's documentation system to ensure accurate, timely, and accessible extension records and data.
g. Supervise and provide direction to department personnel in the performance of assigned duties and responsibilities.
h. Propose and/or implement policies, procedures and guidelines for continual improvement of the department's systems.
*i. Perform other duties and responsibilities as may be assigned.*

**2. Planning and Performance Management Department**

a. Undertake the preparation, review, and/or revision of the University's extension and volunteerism-related plans.
b. Translate institutional extension targets into measurable performance indicators for colleges, offices, and centers, ensuring alignment with University goals and statutory and regulatory requirements.
c. Consolidate and/or analyze extension performance data to aid in report preparation and decision making.
d. Prepare extension performance reports required by internal and external stakeholders, including oversight agencies and accrediting bodies.
e. Design and facilitate the implementation of interventions necessary to improve the overall performance of the University in extension and volunteer services.
f. Manage the department's documentation system to ensure accurate, timely, and accessible extension records and data.
g. Supervise and provide direction to department personnel in the performance of assigned duties and responsibilities.
h. *Propose and/or implement policies, procedures and guidelines for continual* improvement of the department's systems.
i. Perform other duties and responsibilities as may be assigned.

**3. Extension Affairs and Linkages Department**

a. Coordinate with various stakeholders towards the establishment of extension linkages.
b. Spearhead the conduct of capacity development and other relevant activities organized by the office.
c. Coordinate and/or facilitate the University's participation to relevant external activities.
d. Perform tasks related to the application or participation of the university to relevant awards or competitions.

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e. Prepare department-related plans, reports, and other documentation required by internal and external stakeholders.
f. Manage the department's documentation system to ensure accurate, timely, and accessible extension records and data.
g. Supervise and provide direction to department personnel in the performance of assigned duties and responsibilities.
h. Propose and implement policies, procedures, and guidelines for continual improvement of the department's systems.
i. Perform other duties and responsibilities as may be assigned.

**4. Publication and Communication Department**

a. Plan and supervise the development, packaging, and communication of relevant information across various platforms (e.g., official print and digital platforms).
b. Manage the registration, retention, distribution, and archiving of controlled *documented information of the office*.
c. Provide technical support in the conduct of extension and volunteerism-related studies, such as but not limited to outcome and impact assessments, and evaluation of processes and service delivery performance.
d. Prepare department-related plans, reports, and other documentation required by internal and external stakeholders.
e. Manage the department's documentation system to ensure accurate, timely, and accessible extension records and data.
f. Supervise and provide direction to department personnel in the performance of assigned duties and responsibilities.
g. Propose and implement policies, procedures, and guidelines for continual improvement of the department's systems.
h. Perform other duties and responsibilities as may be assigned.

**5. Volunteerism Management Department**

a. Coordinate and/or support volunteerism initiatives across University sectors, including faculty, non-teaching personnel, students, alumni, and external partners, to ensure alignment with institutional priorities.
b. Develop, implement, and/or support volunteer programs and activities that *respond to identified community needs and promote ethical, inclusive, and* accountable volunteer engagement.
c. Facilitate collaboration and/or coordination among internal and external stakeholders to enhance the reach, effectiveness, and inclusivity of volunteerism initiatives.
d. Monitor the volunteerism initiatives to support continuous improvement and alignment with institutional standards and relevant national frameworks.
e. Prepare department-related plans, reports, and other documentation required by internal and external stakeholders.
f. Manage the department's documentation system to ensure accurate, timely, and accessible extension records and data.
g. Supervise and provide direction to department personnel in the performance of assigned duties and responsibilities.
h. *Propose and implement policies, procedures, and guidelines for continual* improvement of the department's systems.
i. Perform other duties and responsibilities as may be assigned.

g. **OUES Technical Staff.** An OUES technical staff shall be under the direct supervision of a department head and shall perform the following technical tasks relevant to the department and/or section where assigned.

1. Prepare technical reports, documents, and/or other works required under the department and/or section where assigned.
2. Perform coordination tasks relevant to the undertakings of the department and/or section where assigned.
3. Assist in the conduct of relevant activities and events.

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4. Perform other tasks as will be assigned.

h. **OUES Support Staff.** The support staff shall perform various office, department, and/or section-level clerical and other tasks, such as, but not limited to, communication with clients, data management, document handling, logistics, customer service, and workplace organization.

i. **College-Based Extension Department Heads**

1. The CEDH shall be designated by the University President through a special order and *must be a permanent faculty member for at least two (2) years, except for justifiable cases.*

2. The CEDH shall be entitled to vacation and sick leave credits instead of the usual proportional vacation pay given to regular faculty members.

3. The CEDH shall perform the duties and responsibilities specified below.

   a. Oversee the extension and volunteerism functions of the college.
   b. Prepare relevant college-level plans and reports.
   c. Attend required meetings and other relevant activities.
   d. Disseminate relevant information to the college community.
   e. Assist in addressing relevant concerns within the college.
   f. Perform other tasks as will be assigned.

j. **College-Based Extension Technical Staff.** The technical staff designated under the colleges shall perform the duties and responsibilities mentioned below.

1. Assist in the preparation and submission of documents and other requirements relating to the extension and volunteer services of the college.
2. Assist in the documentation and monitoring of implemented extension and volunteer services.
3. Prepare relevant college-level reports and information materials.
4. Perform relevant clerical tasks.
5. Perform other tasks as will be assigned.

k. **Extensionists and Volunteers.** These individuals shall perform the duties and responsibilities specified below.

1. Develop proposals and/or participate in approved extension and volunteer services.
2. Deliver extension and volunteer services in accordance with the details of the approved proposal and other applicable policies, procedures, and guidelines.
3. Comply with documentary requirements relating to proposed and implemented extension and volunteer services.
4. Participate in required relevant activities.

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## Chapter IV. Fundamental Provisions and Service Standards

### Section 1. Fundamental Provisions

a. Extension is one of the mandated functions of the University; thus, plantilla faculty members are required to serve the needs of beneficiaries and clients along the former's lines of expertise, while plantilla non-teaching personnel are required to serve in line with their expertise and/or capabilities.

b. *The extension services of faculty members must be aligned with the mandated and priority* programs of the University to be prioritized for internal funding.

c. Extension services must cater to the needs of the beneficiaries and clients as evidenced by research outputs, needs assessment reports, processed evaluation results, or other similar documents.

d. Faculty members, non-teaching personnel, students, alumni, and other external parties are encouraged to deliver volunteer services to complement the mandated extension services being delivered by the University.

### Section 2. Service Standards

a. *The OUES shall ensure continual improvement in the University's delivery of extension and* volunteer services towards the utmost satisfaction of beneficiaries and/or clients by setting up and implementing quality management system standards, including policies, procedures, processes, and guidelines.

b. The OUES shall ensure that the delivery of extension and volunteer services is measured by relevant criteria and/or conditions as may be governed by existing government and/or university standards on:

   i. submission of pre-implementation and post-implementation documentation requirements;
   ii. timeliness in the delivery of services;
   iii. post-implementation evaluation; and
   iv. internal quality audit.


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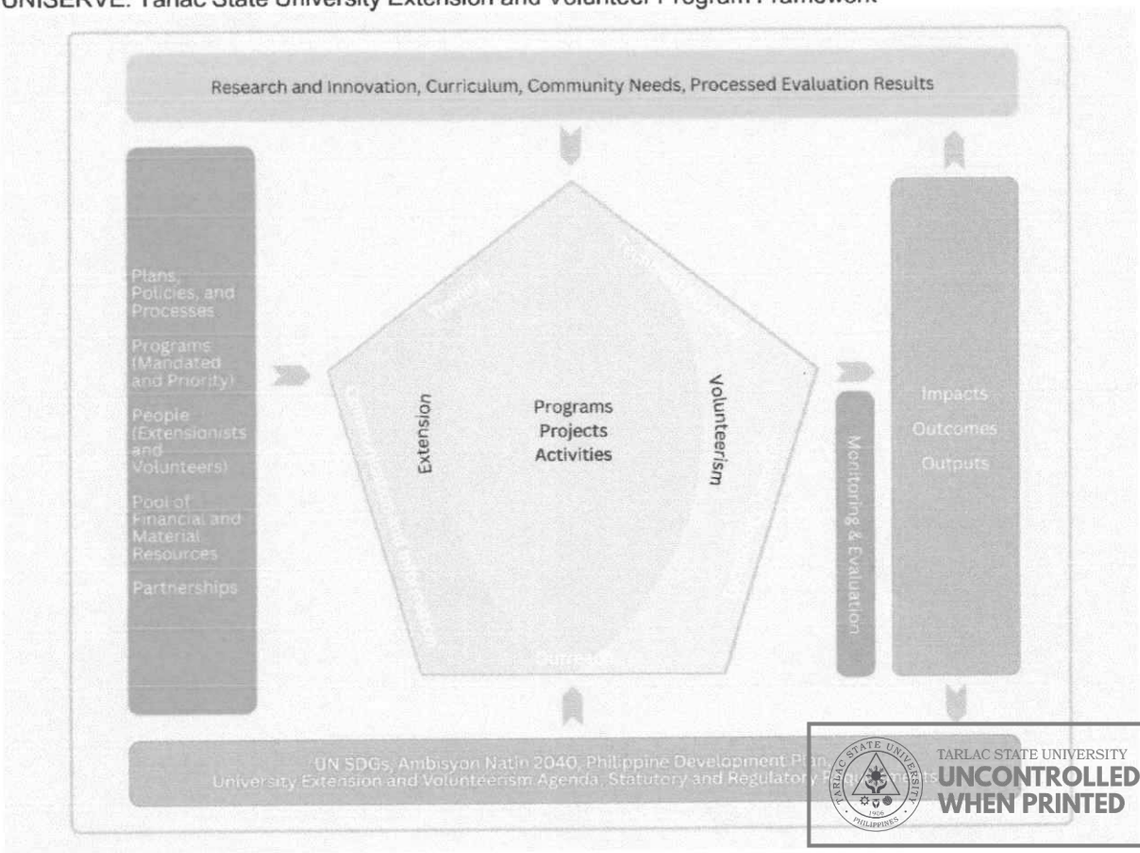
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## Chapter V. Extension and Volunteerism Framework, Agenda, Program Categories, and Types of Services

**Section 1. Extension and Volunteer Program Framework.** UNISERVE, the University's Extension and Volunteer Program Framework, guides TSU in the development, implementation, monitoring, and evaluation of extension and volunteer services to target communities and other beneficiaries and clients. UNISERVE is an acronym which stands for "Understanding, Nurturing, and Improving Society and the Environment through Responsive Volunteerism and Extension" and is a wordplay that encapsulates the "third mission" of TSU, that is, the UNIVERSITY SERVING the community through responsive extension *and volunteerism*.

Extension service and community engagement (ESCE) start with understanding the needs of the community. Primarily, the framework is characterized by three categories of inputs that are necessary to gain a well-informed understanding of a community's needs. At the bottom are inputs that represent the University's foundation and motivation for pursuing ESCE: the desire to contribute to the attainment of the United Nations' Sustainable Development Goals, Ambisyon Natin 2040, and the Philippine Development Goals; the mandate to address the University Extension Agenda; and the obligation to comply with statutory and regulatory requirements of the government and various accreditation bodies. The inputs on the left side are the 5Ps which represent the enabling environment and resources needed to operationalize ESCE: plans, policies, and processes that provide guidance, ensure compliance, and achieve efficiency; mandated and priority programs which determine the University's capability and expertise; people, or the extensionists and volunteers consisting of faculty and personnel, students, alumni, and external parties; pool of financial *and material resources from both internal and external sources; and partnerships with various stakeholders*, such as government agencies, non-government organizations, and the private sector. At the top are inputs that serve as the bases for the conduct of extension and volunteer services: products of research and innovation activities from the colleges, research centers, and some offices; innovations in the curriculum; needs of the community identified through formal assessments; and processed evaluation results from completed programs and projects.

Figure 2
UNISERVE: Tarlac State University Extension and Volunteer Program Framework




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The next phase of ESCE involves nurturing the community through the development and implementation of extension and volunteer programs, projects, and activities consisting of one or a combination of the following five types of services (hence, the pentagon): training, technical assistance and advisory, technology transfer and utilization, communication and information services, and outreach. A Venn diagram-like figure is placed inside the pentagon to give emphasis on the differences as well as similaritieis or overlap between extension and volunteerism. Faculty and staff are primarily expected to fulfill the extension mandate, while students, alumni, and other external parties contribute volunteer services.

Integral to ESCE are monitoring and evaluation systems in order to keep track of the status of implementation, identify problems and issues, validate outputs, and assess outcomes and impacts of extension and volunteer initiatives. Monitoring and evaluation also ensure that feedback from beneficiaries are gathered and used to inform decision making. Ultimately, the goal of extension and volunteerism is to improve society and the environment—improving the quality of lives of people while preserving the environment at the same time. The outputs, outcomes, and impacts derived from responsive volunteerism and extension services are the University's contribution to the attainment of the UN SDGs, Ambisyon Natin 2040, and the Philippine Development Goals, the fulfillment of the extension agenda, and compliance to statutory and regulatory requirements. Moreover, the outputs, outcomes, and impacts serve as valuable inputs to further research activities and innovation of curriculum, and inform future community needs assessment and program planning.

**Section 2. Extension and Volunteerism Agenda.** The Tarlac State University aims to be a champion in community development by strengthening partnerships with public and private organizations and individuals (aligned with SDG 17) and offering relevant extension and volunteer services in line with the University's mandated and priority programs, faculty expertise, and available resources. All of these are geared towards human security, sustainable communities, and inclusive nation-building.

Table 1
University Extension and Volunteerism Agenda

| Agenda | Possible Extension Areas | Alignment with the UN SDG/s |
|---|---|---|
| 1. Quality Education and Human Capacity Development | Literacy; numeracy; educational reforms and innovation skills development; ICT for education; values formation and restoration; personality development; continuing education; professional development | SDG 4 |
| 2. Food Security, Good Health and Nutrition | Reproductive health; family planning; maternal health; child care; promotion of healthy lifestyle; disease prevention; drug discovery; ICT for health; mental health; health service delivery; food safety; functional foods. | SDG 2, SDG 3, SDG 6 |
| 3. Promotion of Language, Arts, History and Culture | Cultural awareness and preservation; tourism; ICT for culture and heritage preservation | SDG 11 |
| 4.Technology Promotion and Advancement | Transportation solutions; clean and renewable energy; ICT; infrastructure | SDG 7, SDG 9 |
| 5. Economic Growth and Enterprise Development | Manufacturing; food production and processing; business planning; industry development; financial literacy; regulatory compliance; ICT for business; global competitiveness | SDG 1, SDG 8 |
| 6. Good Governance and Promotion of Human Rights, Equality, Justice and peace | policy recommendation; ICT for governance; gender and development; indigenous peoples; advocacies against discrimination, violence and crime; legal services | SDG 5, SDG 10, SDG 16 |
| 7. Environmental Protection, Climate Change Adaptation, and Disaster Risk Reduction | Management of natural resources and environment; ICT for disaster risk reduction; risk assessment; policy recommendation | SDG 12, SDG 13, SDG 14, SDG 15 |

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**Section 3. Extension and Volunteer Program Categories.** Extensionists and volunteers develop and implement various extension and volunteer services that are anchored under one of the institutional extension program categories described below.

a. **Sustainable Community Development (ComDev) Program.** The Sustainable ComDev Program is geared towards identifying the needs of communities and underprivileged sectors and matching these with the capabilities of the institution towards development. A community is envisioned to serve as a model by which technical and non-technical services are provided by the university so that change in socio-cultural, physical, technological, and environmental conditions ideal for sustainable development is created and the success and lessons learned can be duplicated by *other communities under the same conditions or situation.*

   The program seeks to provide services to improve the condition of a community and to capacitate its people through a combination of technology transfer, knowledge and skills training, and outreach, among others. It will integrate all the necessary factors to development; hence, the approach will be holistic.

b. **Industry Development (InDev) Program.** The InDEv Program aims to provide technical services to MSMEs in order to increase their productivity and assist in graduating them to the next enterprise level. The program seeks to identify and assess the technical and non-technical needs or problems of the MSMEs through firm walk-throughs, measurements, and interviews, among others. In the end, short-term and long-term recommendations are provided in response to the identified needs. Experts also assist in the implementation of the recommendations adopted by the MSMEs.

c. **Support Services Program (SSP).** The SSP provides specific support services to various organizations, informal groups, or individuals, including, but not limited to, the following:

   1. Non-formal education – educational activities that focus on practical knowledge acquisition or skill building, targeting a broad range of groups or individuals

   2. *Continuing education – educational activities that aim to update the knowledge or upgrade* the skills of professionals or other individuals who seek professional or personal development

   3. Technical Assistance – activities that provide expert advice and assistance to beneficiaries or clients to address specific technical problems they encounter

d. **Student Extension Experience (SEE) Program.** The SEE Program is intended for leaders and members of recognized student organizations in the University who take responsibility in identifying, planning, fund-sourcing and implementing volunteer initiatives for an identified community or sector. The program is aimed at inculcating, through practice, the value of helping to enhance community well-being by integrating extension and volunteerism in their annual program of activities. Moreover, the program aims to unleash students' creativity and resourcefulness, *heighten social consciousness, and encourage collaboration with their peers and other* stakeholders.

e. **Special Programs/Projects.** Special programs or projects are those in which the University has been tapped or commissioned by an external entity, whether public or private, to implement such.

**Section 4. Types of Extension and Volunteer Services.** Adapted from CHED Memorandum Order No. 08 s.2010, an extension service may take on one or a combination of the types of services enumerated below.

a. **Training** or other similar activities in the form of non-degree and non-credit courses

b. **Technology Transfer** involves circulating, promoting, and marketing research outputs or technologies to adopters.

c. **Technical Advisory** involves the provision of professional assistance that is consultative in nature to organizations and individuals.


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d. **Communication or Information Services** involves the dissemination of knowledge and skills through various means such as, radio, television, newspaper and other printed or online materials.

e. **Outreach** may be a professional or non-technical service that does not fall under any of the types of services mentioned above.


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## Chapter VI. Strategies and Approaches

**Section 1. Extension and Volunteerism Culture.** The University shall promote an ideal extension and volunteerism culture that prioritizes quality service more than anything else.

**Section 2. Manpower Resource Development.** The University, through the OUES, shall organize capacity development initiatives for the purpose of enhancing the knowledge and skills of extension personnel, extensionists, and volunteers on program development and management and other relevant topics.

**Section 3. Institution-Public-Private (IPP) Sector Partnership.** IPP sector partnership views extension or volunteerism not as a sole work or function of the University but as a collaborative social work of various entities, including government agencies, local government units, civic organizations, non-government organizations, business sector, professional organizations, and other groups or associations. Partnership *with the public and/or the private sector puts all involved as stakeholders to development; hence, it unifies* efforts and pools shared resources for a common objective of assisting a common beneficiary or client towards development.

**Section 4. Multidisciplinary and Complementary Service Approach.** The University shall encourage extensionists and volunteers from various professional disciplines and backgrounds to work collaboratively on programs and projects, utilizing their respective expertise and capabilities to address problems holistically.

**Section 5. Beneficiary or Client-centered Approach.** The needs of beneficiaries or clients shall be the main focus when planning and implementing extension and volunteer services in order to ensure that they will experience development the way they defined it. This approach promotes a participatory process, active engagement, and empowerment among beneficiaries and clients.

**Section 6. Integration of Technology.** The University shall take advantage of recent technological advances such as, but not limited to, e-learning, video conferencing, mobile and computer applications, artificial intelligence, GIS mapping, and internet of things, to enhance the delivery of extension and volunteer services.

**Section 7. Monitoring, Assessment, and Communication of Results.** The OUES shall engage and/or provide assistance in the monitoring and evaluation of extension and volunteer services and regular assessment and reporting of physical and financial accomplishments, success stories, as well as lessons learned.


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## Chapter VII. Extension Funding and Physical Resources

**Section 1. Funding Sources for Extension.** The funding for extension operations and the implementation of extension and volunteer services shall come from the following sources:

a. General Appropriations Act – allocation for extension from the annual regular University budget coming from the national government

b. *Internally Generated Income – allocation for extension from tuition fees, auxiliary services, and* entrepreneurial ventures of the University

c. External Grants – funds provided by external funding agencies

d. Proceeds from the conduct and/or completion of extension or volunteer programs and projects – amounts realized or income generated from extension or volunteer programs and projects which shall be placed in a trust fund and shall be used exclusively to fund extension or volunteerism-related expenses.

**Section 2. Use of Extension Funds.** The use of extension funds shall be governed by applicable policies and supported by an approved annual budget plan and other relevant documents.

**Section 3. Funding for Extension and Volunteer Services**

**a. Internal funding**

i. The budget for internally funded extension and volunteer services shall be taken from the University's budgetary allocation for extension.

ii. A fixed budget shall be allocated each year to every college, center, office, or any other entity that is required to accomplish certain extension or volunteerism-related targets through the implementation of extension and volunteer services. Should the fixed budget be fully utilized, additional funding may be requested subject to availability and approval by the University President.

iii. *Funding of approved extension and volunteer services shall be on a first-come, first-served* basis.

iv. The basis for funding approved extension and volunteer services shall be the itemized budgets indicated in the approved proposals. The funds needed shall be released upon submission of complete requirements.

b. **External funding.** For externally funded extension or volunteer programs and projects, the budget from external funding agencies may or may not be downloaded to the University. In case funding is downloaded to the University, its use shall follow applicable government and University policies.

**Section 4. Project Procurement Management Plan**

a. Proponents shall prepare and submit the PPMP for their respective approved extension and volunteer services before the set deadline for the items to be included in the PPMP of the OUES for the corresponding budget cycle.

b. The OUES shall be responsible for the preparation of the PPMP for the entire extension operations of the University, including the consolidation of PPMPs from approved extension and volunteer services.

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**Section 5. Property Accountability**

a. All physical resources issued for use in extension operations shall be under the accountability of the OUES.

b. All physical resources issued for the implementation of an extension or volunteer service shall be under the accountability of the proponent, particularly the program or project head, if applicable.

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Said physical resources shall be surrendered and property accountability shall be transferred to the OUES within three months after the completion or termination of an extension program or project.


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## Chapter VIII. Extension Affairs and Linkages

**Section 1. Purpose.** This chapter aims to establish clear and structured policies for managing both internal and external extension affairs as well as institutional extension linkages, partnerships, and networks of the University.

**Section 2. Scope.** The provisions of this chapter apply to all activities involving internal and external extension affairs and extension-related institutional linkages and partnerships facilitated by the External Affairs and Linkages Department. These include activities and/or collaborations with units inside the University, government agencies, NGOs, industries, MSMEs, academic institutions, and other stakeholders at the local, national, and international levels.

**Section 3. Extension Affairs.** The OUES, through the EALD, shall manage extension affairs with internal and/or external stakeholders, including but not limited to the following:

a. Coordination of membership applications in extension organizations (institutional and individual)
b. Conduct of or participation in extension competitions, rankings, and awards
c. Conduct of or participation in extension exhibits and fairs
d. Conduct of or participation in relevant seminars, trainings and conferences

**Section 4. Linkages**

a. To expand the reach and impact of the university's extension services, the University shall establish or enter into external linkages and partnerships with various organizations, including but not limited to NGAs, NGOs, LGUs, MSMEs, academic institutions, private sector, and join various extension-related consortia or networks.

b. The OUES shall act as an agent or facilitator in linking the University and its various colleges, centers, and offices with the organizations mentioned above for potential collaborations related to extension.

**Section 5. Contracts**

a. **Type of Contracts.** Different types of contracts may be established to formalize extension linkages and partnerships. If necessary, one of the following contracts shall be utilized based on the nature of collaboration:

    1. An MOA is used when specifying detailed terms and conditions of collaboration. It is legally binding and enforceable. It includes provisions for funding, implementation plans, and responsibilities, among others.

    2. An MOU is used when establishing a general framework for cooperation and collaboration. It is generally non-legally binding but outlines the intent of both parties.

    3. A service contract is specifically used to establish an agreement between parties for the delivery of specific services over a defined period (usually a short one). It is legally binding and outlines the scope of work, deliverables, compensation, timelines, and other relevant terms to ensure accountability and compliance.

b. For convenience, the OUES shall propose, disseminate and, if necessary, revise templates of each type of contract which may be used by extensionists, volunteers, and students for their extension-related undertakings. The templates shall be reviewed by the University Legal Counsel prior to first use and annually thereafter, unless revisions are sooner made.

c. **Review and Approval**

    1. Except for contracts drafted using the templates with no significant provisions added and/or removed, all other contracts shall undergo review by the University Legal Counsel.


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2. Contracts that contain highly critical provisions (e.g. have significant financial implications, partnering with international organizations, etc.) shall be reviewed and endorsed by the University Administrative Council to the BOR for approval.


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## Chapter IX. Extension and Volunteer Services

**Section 1. Scope.** This chapter shall cover policies pertaining to extension and volunteer services, including those for extensionists and volunteers who have the primary responsibility for their development and implementation.

**Section 2. Extension and Volunteer Services Procedure.** The OUES shall maintain, review and update a procedure, which includes processes, guidelines, and forms relating to the proposal, approval, and *implementation of extension and volunteer services*.

**Section 3. Levels of Extension and Volunteer Services.** Extension or volunteer services may be proposed as a program, project, activity, or program structure depending on the complexity of the need being addressed.

**Section 4. Nature of Service.** To ensure accurate crediting of accomplishments to colleges, centers, offices, and individuals and reporting of accomplishments to internal and external interested parties, the following shall apply to distinguish between extension and volunteer services.

a. **Considered as extension service only.** This applies to services that address the minimum extension requirement (i.e. number of credit hours or number of involvement) of plantilla employees in accordance with University or other external policies, provided required documentary evidence *are completely submitted*.

b. **Considered as volunteer service only.** This applies to the following, provided that the needed data for reporting to PNVSCA are available from submitted documentary evidence:

   i. services that address or go beyond the minimum extension requirement of plantilla employees but are not fully compliant to the required documentary evidence for extension;
   ii. non-technical services delivered by plantilla faculty members who have not complied with their minimum extension requirement for a given rating period;
   iii. services delivered by contract of service employees, alumni, and other external stakeholders;
   iv. services delivered by students or student organizations that are not fully compliant to the required documentary evidence for student involvement in ESCE; and
   v. services which are declared by proponents as purely voluntary.

c. **Considered as both extension and volunteer service.** The following may be reported as extension services as well as volunteer services:

   i. services that go beyond the minimum extension requirement of plantilla employees, *whether technical or non-technical, that are fully compliant to the required documentary* evidence for extension; and
   ii. services delivered by students or student organizations that are fully compliant to the required documentary evidence for student involvement in ESCE.

**Section 5. Emergency services.** Extension or volunteer services that warrant immediate implementation to address pressing or urgent issues may be considered for approval despite violation of submission deadlines, provided that a justification letter addressed to the President is submitted along with the proposal and standard documentary requirements.

**Section 6. Extensionists and Volunteers**

a. **Credit Hours or Involvement in Extension and Volunteer Services**

   i. Extensionists and volunteers may earn credit hours or report number of involvement for rendering services specified in the table of roles (see Table 3), which may be used for the purposes of performance review, reclassification, and counting of volunteer hours or contribution, among others.

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Table 3
Roles of extensionists and volunteers

| Role | Description/Scope of Work | Credit Hours | Applicable Category in JC3 (for faculty) |
|---|---|---|---|
| a. Program/ Project Head | Management of a program/project | 25% of the total actual number of program/project hours rendered but not to exceed 10 hours per month | KRA III Criterion B.2 (5 points) |
| b. Project Component Head | Management of a project component | 25% of the total actual number of program/project hours rendered but not to exceed 10 hours per month | KRA III Criterion B.2 (5 points) |
| c. Speaker | Provision of expert services in a training course, seminar, or workshop as Resource Speaker, Keynote Speaker, Plenary Speaker (Including Lecturer and Reviewer for licensure exams); Benchmark number of participants is 25 | Actual number of hours rendered; prorated by the number of participants if the number of participants is equal to or falls below the benchmark but the participants are split into two or more classes. | KRA III Criterion B.1.5 (2 points per hour for local; 3 points per hour for international)<br><br>*For volunteer lecturers in classes *that are part of* students' curriculum: KRA III Criterion B.2 (2 points) |
| d. Panelist | Provision of expert inputs in a panel setup in a training course, seminar, or workshop; Benchmark number of participants is 25 | Actual number of hours rendered; prorated by the number of participants if the number of participants is equal to or falls below the benchmark but the participants are split into two or more sessions. | KRA III Criterion B.1.5 (2 points per hour for local; 3 points per hour for international) |
| e. Technical Facilitator | Provision of expert services in a workshop or other similar activities (includes facilitation in expertise-based outreach activities); Benchmark number of participants is 10 | Actual number of hours rendered; pro-rated by the number of participants if the number of participants is equal to or falls below the benchmark but the participants are split into two or more groups. | For training courses, seminars, or workshops: KRA III Criterion B.1.5 (2 points per hour for local; 3 points per hour for international)<br><br>For expertise-based outreach activities: KRA III Criterion B.2 (2 points) |
| f. Moderator | Provision of expertise-based moderation in technical fora, conferences, debates, etc.; Benchmark number of participants is 25 | Actual number of hours rendered; prorated by the number of participants if the number of participants is equal to or falls below the benchmark but the participants are split into two or more sessions. | KRA III Criterion B.1.5 (2 points per hour for local; 3 points per hour for international) |
| g. Judge/ Examiner | Provision of expert review and critique of various works in a research award or academic competition | Actual number of hours rendered | KRA III Criterion B.1.2 (2 points for research award; 1 point for academic competition) |
| h. Media Expert | Provision of services as Writer in newspaper | Actual number of hours rendered | KRA III Criterion B.1.4 |

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| Role | Description/Scope of Work | Credit Hours | Applicable Category in JC3 (for faculty) |
|---|---|---|---|
| | columns, Host of TV or radio program, or Guest Technical Expert in print, broadcast or online media | | (1 point for guesting, 2 points for writer in an occasional newspaper column, 10 points for writer in a regular newspaper column or host of TV or radio program) |
| i. Consultant | Provision of expert services which do not fall under any of the categories above (Includes roles as Editor, Peer Reviewer, Statistician, Evaluator of Proposals and Researches, Technical Expert, Writer, Developer, and the like) | Actual number of hours rendered | KRA III Criterion B.1.3 (8 points for local, 10 points for international) |
| j. Non-Technical Facilitator | Provision of services that DO NOT substantially involve expertise, e.g., serving as master of ceremonies, operation of audio-visual equipment, facilitor in gift-giving and tree planting activities or clean-up and blood donation drives | For outreach activities: Actual number of hours rendered pro-rated by the number of beneficiaries if less than 25<br><br>For training courses, seminars, workshops, or other activities: Actual number of hours rendered or 50% of the credit hours of the main expert service providers, whichever is lower | None |
| k. Donor | Donate cash or goods | None | None |

ii. The number of credit hours obtained for the conduct of an extension or volunteer service shall be based on the number of hours indicated in the accomplishment report, but not to exceed the number of hours indicated in the approved special order and shall only be granted upon submission of required documentation.

iii. The number of involvement of an extensionist or volunteer shall be based on the number of accomplished services with complete documentary evidence.

iv. The number of credit hours earned by or the number of involvement of an extensionist or volunteer shall be reported every rating period and reset in the succeeding rating period.

v. The minimum required number of credit hours and involvement in extension services of a faculty member or a non-teaching personnel, respectively, per rating period for the purpose of performance review shall be based on the guidelines set forth by an appropriate committee.

**b. Guest extensionists**. Persons who are not employees of the University may be invited to deliver extension services under the conditions specified below and may be entitled to honorarium subject to applicable government policies.

i. No employee in the University possesses the necessary expertise, competence, or skill to deliver the services needed;

ii. Their expertise is essential to the attainment of the goals and/or objectives of the extension service; and

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iii. their service should be solely for extension purposes and should not in any way address capacity building of University employees.

**Section 7. Modification, Cancellation, or Termination.** An approved extension or volunteer service may be modified, cancelled, or terminated subject to the approval of the University President.

a. **Request for Amendment.** A request for amendment may be made to propose modifications on the following elements:

   i. *Extension of implementation dates/duration*
   ii. Change of date of implementation
   iii. Realignment of funds
   iv. Replacement or addition of extensionists or volunteers for the same activity
   v. Others as deemed allowable

b. **Request for Cancellation.** A proponent may request for the cancellation of a service that has not been and will no longer be implemented.

c. **Request for Termination.** A proponent may request for the termination of an ongoing service.

**Section 8. Management of Externally Funded Extension and Volunteer Programs and Projects**

a. In addition to the related provisions in this operations manual, existing University policies and guidelines on the proposal, implementation and management of externally funded projects shall apply to all externally funded extension and volunteer programs and projects, whether fully or partially funded, if the external funding is transferred to the University. These include provisions on proposal preparation, agreements, transfer of funds, reporting and documentation, and monitoring and evaluation.

b. For extension and volunteer programs and projects that are fully funded externally, the proponent shall comply with the documentary requirements and use the prescribed forms and templates of the external funding agency, if applicable. The proponent shall submit to OUES a copy of the documents for purposes of issuing a special order, monitoring of the program or project, and recordkeeping, among others. Additionally, the proponent shall prepare and submit documentary requirements specific to the University, if any. For extension PPAs that are jointly funded by the University and an external funding agency, the documentary requirements to be prepared and submitted as well as the prescribed forms and templates to be used shall be agreed upon by both parties and shall be specified in the contract.


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## Chapter X. Volunteerism Management

**Section 1. Purpose.** This chapter shall cover policies for mainstreaming volunteerism in the University, i.e. integration of volunteerism in the overall day-to-day operations of the institution, including instruction, research, extension, and administration.

**Section 2. Volunteer Program Management**. To complement or supplement the ESCE of the University, the OUES, through the VMD, shall develop volunteer services; assist University employees and students in the development and implementation of volunteer services; and assist the ESMD in the management of *volunteer services or extension services with a volunteerism component*.

**Section 3. Volunteer Management System.** The OUES, through the VMD, shall maintain a volunteer management system or mechanism for the following purposes: processing requests for volunteer support; disseminating volunteering opportunities; facilitating volunteer signup, recruitment, and onboarding; collecting volunteer feedback; and reporting volunteer statistics, among others.

**Section 4. Volunteerism Support Services.** To fully realize volunteerism mainstreaming in the University, the OUES, through the VMD, shall provide the necessary support to other volunteering infrastructure components besides the implementation of volunteer services, including the integration of volunteerism in the curriculum, conduct of volunteerism research and dissemination of results, provision of inputs to administrators on volunteerism-related matters, conduct of capacity building activities for existing and new volunteers, establishment of networks and partnerships on volunteerism, and raising of funds for volunteer *activities, among others*.


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## Chapter XI. Planning and Performance Management

**Section 1. Purpose.** This chapter shall cover policies for systematic planning, implementation, monitoring, and reporting of extension and volunteer-related operations. It ensures that these activities are aligned with institutional goals, responsive to community needs, and accountable through clear performance reporting. This chapter also promotes transparency, measurable outcomes, and continuous improvement in extension and volunteerism.

**Section 2. Scope.** The provisions of this chapter shall cover the development of extension and volunteerism plans, monitoring and coordination of the impact assessment of extension and volunteer services, and preparation of performance reports, which shall be under the responsibility of the PPMD.

**Section 3. Extension and Volunteerism Planning**

a. **Preparation of Plans.** The OUES, through the PPMD, shall prepare the annual University Extension and Volunteerism plans, including but not limited to strategic and action plans, budget plan, learning and development plan, and project procurement management plan, following the planning and budgeting calendar issued by the OUP.

b. **Cascading of Targets.** The OUES shall submit to the OVPRIE the extension and volunteerism targets of colleges, centers, and offices for the succeeding year which shall be placed in their respective annual strategic and action plans.

**Section 4. Extension and Volunteer Service Monitoring and Evaluation**

a. **Monitoring.** All applicable extension and volunteer services shall be subject to periodic monitoring of progress and attainment of indicators based on the submitted proposal, work plan, and monitoring plan.

b. ***Client Satisfaction.*** *The following client satisfaction surveys shall be administered among* beneficiaries or clients of extension and volunteer services:

   i. Client satisfaction survey at the end of each extension or volunteer activity using the OUES-developed form to be used for various purposes such as assessment of the quality of extension services provided and decision making regarding future extension services.

   ii. Client satisfaction survey at the end of each extension program or project using the CHED-prescribed form to be used for faculty reclassification.

c. **Impact Assessment.** Because of the nature of impact assessment as a research activity, the Office of University Research and Development shall be responsible for the conduct of impact assessment of extension and volunteer programs and projects. The OUES shall provide assistance *in terms of providing available data and documents and linking the impact evaluators with the* extensionists and beneficiaries.

**Section 5. Performance Reporting.** The OUES shall prepare and submit performance reports, including but not limited to quarterly scorecards and accomplishments, annual accomplishments, physical inventory of accomplishments, milestones, and summary of credit hours to various internal and external interested parties.


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## Chapter XII. Communication Strategies

**Section 1. Purpose.** This chapter aims to ensure clear, consistent, and effective communication strategies for the dissemination of information in relation to extension and volunteerism in the University. This includes sharing resources and relevant information with both internal and external stakeholders through the OUES to ensure that all communication efforts contribute to achieving the University's broader objectives and fostering positive engagement within the community.

***Section 2. Scope.*** *The strategies apply to all communication efforts of the OUES with its key stakeholders,* including the university community, external stakeholders, and the general public.

**Section 3. Communication Policies**

a. The Publication and Communication Department shall be responsible for overseeing the development, implementation, and monitoring of communication activities related to extension and volunteerism in the University.

b. All communication related to extension and volunteerism must align with the University's vision, mission, and institutional goals.

b. Communication materials related to extension and volunteerism may be disseminated through the *university's official platforms, such as social media channels (e.g., Facebook, YouTube), the* University website, media outlets (radio, television), emails, printed materials (brochures, catalogs, flyers, journals), as well as during training sessions, seminars, forums, and public announcements.

c. All communication content must be transparent, inclusive, and culturally sensitive, ensuring it meets the needs and expectations of both internal and external stakeholders.

**Section 4. Data Privacy and Confidentiality**. To maintain trust and uphold legal and ethical standards, all communication content shall strictly adhere to applicable internal and external data privacy and confidentiality protocols, if necessary.


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## Chapter XIII. Privileges, Incentives, Awards, and Allowances

**Section 1. Purpose.** This chapter contains provisions that may apply to OUES personnel, college-based extension department heads, program/project heads, technical and administrative support staff, extensionists, and volunteers to motivate them further and remain focused on their extension and/or volunteerism efforts.

**Section 2. Equivalent Teaching Load (ETL) or Equivalent Work Load (EWL)**

a. Faculty members with extension-related designations/administrative functions shall be given the following number of units of teaching load and preparations or granted the following ETL to enable them to perform their extension-related functions:

Table 4
Teaching load, number of preparations or ETL for faculty members with extension-related functions

| Position | Number of Units of Teaching Load/ Preparations or ETL |
|---|---|
| Director | 3 to 6 units/1 to 2 preparations |
| OUES Department Heads | 9 to 12 units/1 to 2 preparations |
| College-Based Extension Department Heads | 3 units ETL |

b. Faculty members and non-teaching personnel with approved extension programs or projects may also be granted ETL/EWL subject to the recommendation of the EAC and approval by the University President.

**Section 3. Honorarium**

a. Extensionists shall be entitled to receive honorarium in externally funded extension PPAs if such provision exists, provided that the services will be delivered beyond official time.

b. A guest extensionist may be entitled to receive honorarium from the University subject to applicable policies.

**Section 4. Remuneration for Overtime Services Rendered**. University employees who shall be required by their supervisors to render overtime services in relation to extension or volunteerism-related matters (except for the delivery of extension or volunteer services) may request for the following remuneration, subject to the approval of the granting authority:

a. Service credit for faculty members; and
b. Compensatory overtime credit or overtime pay for non-teaching personnel.

**Section 5. Credit for Faculty Promotion**. The extension and volunteerism accomplishments of a faculty member may be used to earn points for faculty promotion, subject to applicable guidelines.

**Section 6. Funding and Incentives for Paper Presentations and Publications**. Plantilla personnel who present extension or volunteerism-based papers in the In-House Review of Extension Programs and Projects may qualify for incentives and may later on qualify for funding assistance when they present their papers in conferences and/or publish in journals, in accordance with approved procedures and guidelines.

**Section 7. Awards**

a. **Internal Awards.** Awards shall be given to recognize and reward extensionists and volunteers as well as extension and volunteer programs and projects for their outstanding accomplishments and contributions, in accordance with approved University guidelines.


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b. **External Awards.** The OUES shall proactively seek opportunities for the University's participation in external awards and competitions relating to extension and volunteerism and provide assistance in the application process.

**Section 8. Travel and Transportation Allowances.** Authorized OUES personnel, faculty members, and non-teaching personnel who perform extension or volunteerism-related functions or engage in extension or volunteerism-related undertakings outside the University (local or abroad) may request for funding to cover daily travel expenses, transportation expenses, and/or daily subsistence allowance, subject to existing government rules and regulations and University policies.


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## Chapter XIV. Final Provisions

**Section 1. Implementing Procedures and Forms.** The necessary procedures and forms for the proper implementation of the provisions of this operations manual shall be formulated by the OUES with guidance from the EAC. Except for procedures that require approval from the BOR, all procedures and forms shall be approved by the University President.

**Section 2. Review and Amendments.** This manual shall undergo review annually. Amendments, if any, shall be presented to and recommended by the Administrative Council prior to presenting to the BOR for approval.

**Section 3. Repealing Clause.** Any University policy, order, guideline, rule, regulation and/or part/s thereof that are contrary to or inconsistent with the provisions in this manual is hereby repealed, modified, or amended accordingly.

**Section 4. Separability Clause.** If any provision in this manual is declared invalid, illegal, or unenforceable, the remaining unaffected provisions shall remain valid, legal and enforceable.

**Section 5. Effectivity.** Upon approval by the BOR, the updated provisions of this manual shall take effect 15 days after the first publication or dissemination through an official general communication channel of the University.


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