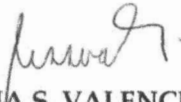


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**Board of Regents Resolution Approving the Revisions of the
Office of University Extension Services Operations Manual**

	Republic of the Philippines TARLAC STATE UNIVERSITY Romulo Boulevard, San Vicente, Tarlac City Tel. No. (045) 606-8200 Official Website: http://www.tsu.edu.ph E-mail Address: pres_office@tsu.edu.ph tsupresident@yahoo.com
EXCERPTS FROM THE MINUTES OF THE 137th REGULAR MEETING OF THE BOARD OF REGENTS OF THE TARLAC STATE UNIVERSITY HELD CHED CENTRAL OFFICE ON MARCH 24, 2025	
<u>Resolution No. 39, s. 2025</u>	
APPROVING THE REVISIONS OF THE OFFICE OF THE UNIVERSITY EXTENSION SERVICES (OUES) OPERATIONS MANUAL, INCLUDING ITS ORGANIZATIONAL STRUCTURE ON THE CONDITION THAT THERE WILL BE NO HIRING OF ADDITIONAL PERSONNEL.	
Certified Correct:  AURELIA S. VALENCIA Board Secretary	



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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. In this rapidly evolving world filled with obstacles, challenges, and conflicting perspectives, it is imperative that guidelines pertaining to extension operations and extension service delivery are regularly reviewed, updated, and properly disseminated.

The revised Operations Manual prepared by the Office of University Extension Service 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 operations and extension service delivery. The provisions of this manual aim to ensure that every concerned individual or entity is on the same page with everyone when it comes to fulfilling the extension mandate of the University.

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 programs and projects will be developed and implemented with the goal of creating lasting impact on communities and individuals.



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Facts and Brief History of Extension Services in TSU

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.

In 2016, the office has 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 of indigenous peoples. The center was managed by the UESO.



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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 the Director of the OUES. In early 2025, the office launched the “program structure” concept which aims to harmonize and institutionalize the extension program offerings of the colleges and offices based on their unique curricular and/or service offerings.



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Chapter I. Preliminary Matters

Section 1. Title, Coverage, and Interpretation

- a. This document shall be called the "Office of University Extension Services Operations Manual."
- b. This manual shall govern all extension-related matters, including extension 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 1987 Philippine 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.** RA 8292, also known as the "Higher Education Modernization Act of 1997," 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.** RA 11695, also known as the "Revised Tarlac State University Charter," 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 clientele 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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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. List of Acronyms Used

BOR	Board of Regents
CEDH	College Extension Department Head
EAC	Extension Advisory Council
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
NTP	Notice to Proceed
OUES	Office of University Extension Services
OUP	Office of University President
PPA	Program, Project, and/or Activity
PPMP	Project Procurement Management Plan
TSU	Tarlac State University
VPRIE	Vice President for Research, Innovation and Extension

Section 5. Definition of Terms

Beneficiary – generally refers to the recipient of an extension service

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

Credit Hours – the number of hours earned by an extensionist for the actual delivery of an extension 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 activiti

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 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 populations

Extensionist – a University employee (faculty or non-academic personnel) who provides an extension service; may be interchanged with the term volunteer if an employee renders an act beyond their mandated 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

Long-term extension program/project – an extension program/project that runs over a course of at least 12 months

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

Proponent – an individual or entity that initiates a PPA



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 (RA 9418). However, a University employee or a student shall only be referred to as a volunteer if the activity is rendered beyond or outside of their mandated extension service or 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 (RA 9418). In the University context more specifically, volunteerism shall be considered as an act falling under the broader field of extension services but undertaken outside the mandated extension of employees or 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
 - 1. instruction
 - 2. research
 - 3. extension (training and consultancy services) and
 - 4. 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. OUES Goals, Objectives, Functions, and Organizational Structure

Section 1. Goals and Objectives

- a. **Goal.** The OUES strives for continual improvement of the university's extension management system and its extension programs, projects, and activities to create lasting impact among its clients.
- b. **Objectives.** The OUES aims to attain the following objectives every year:
 - 1. implement at least 85% of the annual extension plan of the university on time;
 - 2. evaluate and process all extension project proposals and requests submitted by internal and external interested parties within the prescribed time;
 - 3. monitor the completion of all extension PPAs of the university;
 - 4. evaluate at least 85% of all completed extension services of the university;
 - 5. submit at least 90% reportorial documents required by internal and external interested parties within the prescribed timeline;
 - 6. increase number of knowledge and information materials developed and cascaded through print and/or online platforms by 30%;
 - 7. increase the number of faculty, personnel and student engagement by 5% through planned intervention activities for extension chairpersons, personnel, and extension service providers;
 - 8. increase number of university extension affairs and linkages by 5%;
 - 9. obtain at least very satisfactory rating for every extension service delivered; and
 - 10. obtain at least one (1) extension award every three years.

Section 2. Functions

- a. **General Function.** OUES' general function is to manage and supervise the achievement of the University's Extension agenda and targets towards the realization of the University's extension mandate.
- b. **Specific Functions**
 - 1. Plan and cascade university extension targets to the colleges, centers, and offices.
 - 2. Develop and propose the university extension agenda and relevant extension and volunteer programs and projects.
 - 3. Measure the extension performance of the colleges, centers, and offices.
 - 4. Undertake overall coordination of the transfer of knowledge/ technology and other extension-related activities of the University.
 - 5. Facilitate the forging of linkages and partnerships with industries, government agencies, non-government organizations, and individuals.
 - 6. Consolidate and provide reports to internal and external interested parties, as required.
 - 7. Facilitate or undertake the evaluation and processing of extension service proposals for internal funding of the university.
 - 8. Conduct monitoring of the completion of the approved extension services.
 - 9. Develop and disseminate extension-related information through various platforms.
 - 10. Provide technical assistance to faculty and personnel in the development of extension programs and projects for external and/or internal funding of the university.
 - 11. Propose and implement policies, processes, procedures, and mechanisms to ensure the University's extension function's continual improvement.

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 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, embossed



(b) Black, outline

Section 4. Organizational Structure and Functions

- a. **Structure.** The organizational structure of the OUES presents the flow of management of PPAs and extension-related tasks as well as communication of extension-related matters from the University President down to the extensionists.
- b. **University President.** The University President shall
 - 1. provide overall direction towards the realization of the extension function of the University;
 - 2. endorse requests for extension service to the Vice President for Academic Affairs; and
 - 3. approve extension-related matters and documents such as, but not limited to, extension project proposals, office requests, office procedures, and forms.
- c. **Vice-President for Research, Innovation and Extension.** The VPRIE shall
 - 1. provide technical advice and assistance to the OUES;
 - 2. review policies, procedures, processes, guidelines, and proposals prepared by the OUES; and
 - 3. recommend to the University President the approval of extension-related matters and documents such as, but not limited to, extension project proposals, office requests, office procedures, and forms.
- d. **Extension Advisory Council**
 - 1. **Composition.** The EAC shall be composed of the following:

Chair:

Vice Chair:

Members:

Secretariat:

VPRIE

Vice President for Academic Affairs

Vice President for Administration

Director, Office of University Research Development

Director, OUES

OUES Staff
 - 2. **Functions**
 - a. Assist the President in setting directions, planning, and allocating funds for extension.
 - b. Review the University’s extension thrusts, priorities and agenda.
 - c. Formulate, review and recommend extension-related policies, processes, and guidelines.



- d. Evaluate extension program proposals as well as extension project proposals that require substantial amounts of funding and recommend prioritization based on the available extension funds of the University.
- e. **Director.** As the head of the OUES, the director shall undertake the functions specified below.
1. Manage and direct the overall operation of the office.
 2. Endorse extension services proposals to the office of the University President through the office of the Vice-President for Research Development and Extension.
 3. Review and certify completion monitoring reports of extension services rendered by colleges, centers, and offices.
 4. Provide overall guidance in the development, production and dissemination of extension knowledge and information.
 5. Provide guidance in the implementation of internal and external extension affairs, establishment of linkages and development of extension services of the University.
 6. Supervise the implementation of special projects of the University in extension.
 7. Facilitates the development and updating of the University Extension Agenda.
 8. Submit plans and reports required by internal and external interested parties.
 9. Supervise and report the evaluation of performance of the colleges, centers and
 10. Review and update the university extension operations manual including programs, policies, procedures and guidelines.
 11. Represent the office in various University Activities and the university in various external extension-related activities.
 12. Plan and implement intervention programs for the personnel, faculty and staff towards effective and efficient delivery of extension services.
 13. Plan and request the needed resources for the operation of the office.
 14. Schedule assignments and evaluate performance of the personnel assigned in the office.
 15. Certify the extension undertakings of the faculty members as required.
 16. Ensure proper documentation of all extension undertakings of the university.
- f. **OUES Department Heads.** OUES department heads shall directly report to the director and perform the functions enumerated below.

1. Extension Service Management Department

- a. Plan and supervise the evaluation and monitoring of the completion of the extension services of the colleges and centers.
- 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. Recommend policies, processes, and guidelines for continual improvement of the evaluation and monitoring system of the office.
- g. Assign tasks to and supervise staff under the department.
- h. Submit required department-related plans and reports to internal and external interested parties.
- i. Ensure proper documentation of all the activities and undertakings of the department.

2. Planning and Performance Monitoring Department

- a. Plan and supervise the planning and measurement of performance vis'-avis University's targets in extension.
- b. Facilitates the consolidation of plans and targets of Colleges, Offices and Centers.
- c. Measure and analyze performance of the University in extension in reference to approved targets and plans.
- d. Design and facilitates implementation of interventions necessary to improve the overall performance of the University in Extension.
- e. Communicates results of the planning and measurement performance activities to interested parties.



- f. Recommend policies, processes, and guidelines for continual improvement of the planning and performance measurement system of the office.
- g. Assign tasks to and supervise staff under the department.
- h. Submit required department-related plans and reports to internal and external interested parties.
- i. Ensure proper documentation of all the activities and undertakings of the department.

3. Extension Affairs and Linkages Department

- a. Plan and supervise the monitoring and documentation of the extension services of the mandated offices and those initiated by the offices of the Vice Presidents and the University President.
- b. Plan and supervise the participation of the university to extension-related competition (award giving bodies and funding agencies) in national and international levels.
- c. Facilitate and supervise the forging of the national and international extension linkages of the University.
- d. Develop implementation program of established extension linkages of the university, as needed.
- e. Manage and coordinate the internal and external extension affairs of the university.
- f. Recommend policies, processes, and guidelines for continual improvement of the systems and operations of the department.
- g. Assign tasks to and supervise staff under the department.
- h. Submit required department-related plans and reports to internal and external interested parties.
- i. Ensure proper documentation of all the activities and undertakings of the department.

4. Publication and Communication Department

- a. Plan and supervise the development, production and dissemination of technology, knowledge, and advocacy information materials of the university in various platforms and modalities.
- b. Program and supervise the development, production and dissemination of regular publication materials and annual report of the office. Plan and supervise the conduct of extension studies, such as but not limited to the assessment of outcomes or impacts of completed extension services of the university, evaluation of the effectiveness of the processes and performance of the extension service providers in the delivery of extension service.
- c. Manage the registration, retention, distribution and archiving of controlled documented information of the office.
- d. Plan and supervise the maintenance and updating of information [status on various printed materials and official online platforms.
- e. Recommend policies, processes, and guidelines for continual improvement of the systems and operations of the department.
- f. Assign tasks to and supervise staff under the department.
- g. Submit required department-related plans and reports to internal and external interested parties.
- h. Ensure proper documentation of all the activities and undertakings of the department

5. Volunteerism Management Department

- a. Coordinate and oversee volunteerism initiatives across all sectors of the University, including faculty, non-teaching personnel, students, alumni, and external partners, to ensure alignment with institutional goals.
- b. Develop and implement structured volunteer programs that address community needs, promote stakeholder engagement, and uphold the University's commitment to social responsibility.

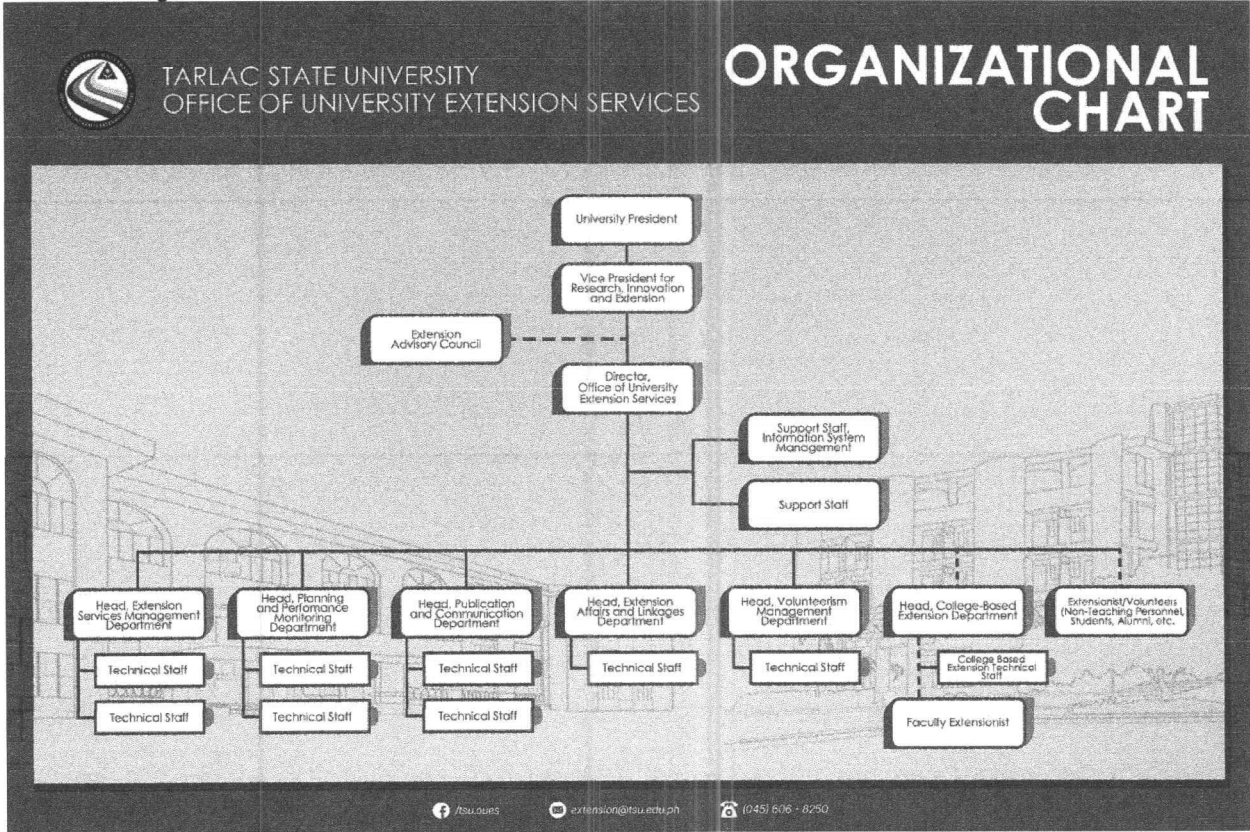


- c. Facilitate collaboration among stakeholders to enhance the impact of volunteerism activities and ensure inclusivity in program participation.
 - d. Monitor and evaluate the effectiveness of volunteer initiatives to ensure continuous improvement and alignment with national and international standards.
 - e. Recommend policies, processes, and guidelines for the continuous improvement of the systems and operations of the department.
 - f. Assign tasks to and supervise staff under the department.
 - g. Submit required department-related plans and reports to internal and external interested parties.
 - h. Ensure proper documentation of all the activities and undertakings of the department.
- g. **OUES Technical Staff.** An OUES technical staff shall be under the direct supervision of a department head and shall perform technical tasks specified below.
 - 1. Prepare technical reports related to project monitoring, proposal evaluations, accomplishments, and other related reportorial requirements of internal and external parties.
 - 2. Prepare and lay-out info-graphic designs and other information materials of extension.
 - 3. Prepare, layout, and package directory of experts, extension newsletters, the book of abstracts and other information materials related to office operations, and the colleges' delivery of extension services.
 - 4. Prepare news articles and publication to various printed and official online platforms of the office. Consolidate and analyze data and information for factual decision making and data driven policy formulation.
 - 5. Prepare and package documentary requirements for national and international extension competition for awards and funding merits.
 - 6. Communicate and coordinate with colleges on the needed extension related information necessary for publication and development of knowledge [information materials.
 - 7. Registration, retention, distribution and archiving of controlled documented information of the office.
 - 8. Prepare of extension proposals, contracts, and agreements.
 - 9. Organize and facilitate extension activities and events.
 - 10. Perform other tasks as will be assigned.
- h. **Support Staff.** The support staff shall perform various clerical tasks in the office, including, but are not limited to, the encoding of information on the computer, routing of documents to collect signatures; submission, transmittal, or retrieval of documents; proper filing of office documents; and proper storage of office supplies and equipment.
- i. **College-Based Extension Department Heads.**
 - 1. The CEDH shall be a permanent faculty member in the University for at least two (2) years and shall be designated by the University President, except under justifiable cases in which the College Dean shall write a formal request to the University President.
 - 2. The CEDH shall be entitled to vacation and sick leave credits but not teachers leave and proportional vacation pay.
 - 3. The CEDH shall perform extension-related tasks and work in close coordination with the OUES but shall remain under the administrative supervision of the college dean.
 - 4. Functions.
 - a. Assist the College Dean in the identification and requisition of resources needed for the operation of the College-Based Extension Department.
 - b. Assist in the preparation of the annual strategic plan in relation to extension matters.
 - c. Supervise the overall operation of the CED.
 - d. Assign tasks and evaluate the performance of college-based extension technical staff of the CED.
 - e. Review and recommend extension service proposals to College Dean.



- f. Submit plans and reports required by internal and external interested parties from the college.
 - g. Ensure proper documentation of all the activities and undertakings of the department.
 - h. Attend meetings and capacity development activities organized by OUES and communicate information and learnings to faculty members in the college.
- j. **College-Based Extension Technical Staff**
- 1. Prepare reportorial requirements in relation to the extension PPAs of the college.
 - 2. Submit reportorial requirements and other extension-related documents to OUES.
 - 3. Assist in the monitoring and documentation of extension PPAs of the college.
 - 4. Prepare extension-related information, education, and communication materials.
 - 5. Ensure proper filing and safekeeping of extension-related documents and records.
- k. **Extensionists and Volunteers.** These are individuals or groups composed of faculty members, non-academic personnel, students, alumni, and external stakeholders who plan, propose, implement and/or participate in extension PPAs. They shall
- 1. plan and prepare extension service proposals;
 - 2. coordinate extension PPAs with the OUES or through the College; Extension Departments (for faculty members), beneficiaries/clients and other key stakeholders;
 - 3. deliver extension PPAs to beneficiaries/clients in accordance with approved proposals and other conditions; and
 - 4. prepare and submit documentary requirements relating to proposed and implemented extension PPAs.

Figure 2
Extension Organizational Structure



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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, faculty members and non-academic personnel who are qualified to extend services are required or encouraged, as the case may be, and are accorded every opportunity to serve the needs of various beneficiaries and/or clients based on their line of expertise.
- b. The extension programs and projects of faculty members and non-academic personnel must be within the mandates of the University and/or their respective colleges, centers, or offices to be considered for internal funding.
- c. The extension budget of the colleges, centers, or offices shall be based on the itemized budgets contained in extension service proposals submitted and subsequently approved for a particular budget cycle.
- d. Faculty members, non-academic personnel, students, alumni, and other stakeholders are also encouraged and given the opportunity to deliver non- technical extension and/or volunteer services to complement the extension services being provided to beneficiaries and/or clients.

Section 2. Service Standards.

- a. The OUES shall ensure continual improvement in the University’s delivery of extension services towards the utmost satisfaction of beneficiaries and/or clients by setting up and implementing quality management system standards, including extension policies, procedures, processes, and guidelines.
- b. The OUES shall ensure that the delivery of extension services is measured by relevant criteria and/or conditions as may be governed by existing government and/or university standards on:
 - 1. pre-implementation documentation requirements;
 - 2. timeliness in delivery of services;
 - 3. post-activity evaluation;
 - 4. submission of post-activity requirements; and
 - 5. internal quality audit



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Chapter V. Extension Agenda, Programs and Services

Section 1. Extension 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 programs in line with the University's academic program offerings, expertise, and resources. All of these are geared towards human security, sustainable communities, and inclusive nation-building.

Table 1
University Extension Agenda

Agenda	Possible Extension Areas	Alignment to the SDG/s
1. Quality Education and Human Capacity Development	Literacy; numeracy; educational reforms and innovation skills development; value 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	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; 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

Section 2. Extension Program Components. The faculty members, non-academic personnel, students, alumni, and external stakeholders of the University plan and manage various extension PPAs aligned with their specific mandates and priorities. Each of these PPAs are anchored under one of the institutional extension program components described below.

- a. **Tulong-Sulong sa Komunidad: Sustainable Community Development (ComDev) Program.** The Sustainable ComDev Program is geared towards identifying the needs of communities and sectors and matching these with the capabilities of the institution towards development. The community will serve as a model by which technical and non-technical assistance are provided by the university to the people within so that change in socio-cultural, physical, technological, and

environmental conditions ideal for sustainable development is created as a model, the success and lessons learned can be duplicated by other communities under the same conditions or situation.

The program seeks to provide technical assistance to improve the physical condition of the community and to capacitate its people through transfer of technology, knowledge and skills training. It will integrate all the necessary factors to development; hence, the approach will be holistic.

- b. **Tulong-SUlong sa Kalakalan: Industry Development Extension (InDEx) Program.** The InDEx Program aims to provide technical advice and consultancy 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. **Tulong-SUlong sa Kaalaman, Atbp: Extension Support Services Program (ESSP).** The ESSP provides specific support services that TSU can offer, namely:
 - 1. Non-formal education on short-term vocational courses, food/manufacturing technologies and development of cultural skills and arts
 - 2. Continuing education – upgrade competencies of professionals and uplift the social, cultural, economic, and physical well-being and capabilities of the elderly, the youth, and other organizations such as cooperatives, people’s organizations and others
 - 3. Technical Assistance – provide expertise to walk-in clients in addressing specific technical problems being encountered specifically for the industry sector including local government units and other organizations/associations.
 - 4. Effective governance includes assistance on urban planning, land use planning and sustainable development, computerization of governance, etc.
- d. **Tulong-SUlong sa Kabataan: Student Extension Experience (SEE) Program.** Leaders and members of recognized student organizations are basically the stakeholders in this program as they will lay the major role of planning, identifying, fund-sourcing and implementing volunteer initiatives in an identified community or sector. It is aimed at inculcating, through practice, the value of helping to enhance community improvement by integrating extension and volunteerism in their annual program of activities.
Specifically, it envisions to encourage student organizations’ participation in community work, to develop creativeness and resourcefulness in putting up a community/sector-based development undertaking, to heighten development consciousness among TSU students, and to promote a healthy competition among student organizations through project development and implementation.
- e. **Tulong-SUlong Kaagapay: Special Extension Programs/Projects.** Special extension 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 3. Types of Extension Services. In accordance with CHED Memorandum Order No. 08 s.2010, an extension service may take on one or a combination of the following types of services.

- a. **Training Programs** that are non-degree and non-credit courses offered by a college or unit.
- b. **Technical Assistance and Advisory Services** to agencies, organizations, associations and other groups and sectors
- c. **Communication or Information Services communication** and/or dissemination of knowledge and skills to client groups through the various means of dissemination such as a person-to-person contact, radio, television, radio, newspaper and other printed or online info materials.

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- d. **Community Outreach Activities** extension activities conducted in areas outside the university such as community -based social services, pilot projects, mobile clinic, etc.
- e. **Technology Transfer and Utilization** the process circulating, promoting, and marketing research outputs or technologies to potential users.



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Chapter VI. Strategies and Approaches

Section 1. Extension Service Culture. The OUES shall promote an ideal extension service culture that prioritizes quality service more than anything else.

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

Section 3. Institution-Public-Private Sector Partnership. The IPP partnership views extension not as a sole work or function of the institution but as a collaborative social work of various entities, including government offices and the private sector such as civic organizations, non-government organizations, professional organizations, and other private 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 Complimentary Extension Service Approach. The OUES shall encourage extensionists and volunteers to work collaboratively on extension PPAs, utilizing their expertise and capabilities to address problems holistically.

Section 5. Client-centered Efforts. The needs of beneficiaries or clients shall be the main focus when conceptualizing and planning extension PPAs in order to ensure that they will experience development the way they define it.

Section 6. Monitoring, Assessment, and Communication of Results. The OUES shall engage and/or provide assistance in the monitoring and evaluation of extension PPAs as well as regular reporting and assessment of physical and financial accomplishment for proper adjustments of plans and implementation strategies, including publication of impacts or successes as well as lessons learned.



Chapter VII. Extension Funding and Physical Resources

Section 1. Funding Sources for Extension. The budgetary requirements for extension operations and the implementation of extension PPAs shall come from the following sources:

- a. General Appropriations Act – regular budget for extension as approved and released by the Department of Budget and Management
- b. External Grants – funds provided by external funding agencies
- c. Share from the tuition fee of students
- d. Proceeds from the conduct and/or completion of extension programs and projects – amounts realized or income generated from extension programs and projects which shall be placed in a trust fund and shall be used exclusively to fund extension-related expenses.

Section 2. Funding for Extension PPAs

- a. The budget for internally funded extension PPAs shall be taken from the University’s budgetary allocation for extension.
- b. For externally funded extension PPAs, the budget from external funding agencies that are transferred to the University shall be treated as a trust fund. The use of said funds shall follow government auditing and accounting rules and regulations.
- c. The basis for funding for all extension PPAs shall be the itemized budgets indicated in the submitted and approved proposals. The funds needed shall be released upon submission of complete requirements.

Section 3. Project Procurement Management Plan

- a. Proponents shall prepare and submit the PPMP for their respective approved extension PPAs before the set deadline for it 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 consolidated PPMPs from approved extension PPAs.

Section 4. 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 PPA shall be under the accountability of the proponent, particularly the program or project head, if applicable. 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.



Chapter VIII. Extension Affairs and Linkages

Section 1. Purpose. This chapter aims to establish clear, structured, and efficient policies for managing both internal and external extension affairs as well as institutional 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 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 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. Participation in rankings, extension competitions and awards
- c. Participation in extension exhibits and fairs
- d. Conduct of or attendance to certain 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 use and annually thereafter, unless revisions are sooner made, and subsequently approved by the BOR.
- 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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- 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 Service Proposals

Section 1. Scope. This chapter shall cover extension and volunteer program, project, or activity proposals for approval by the University President.

Section 2. Levels of Extension Service

- d. Program - refers to 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.). If a program is proposed without specific details of implementation (e.g. confirmed activities, extensionists, dates of implementation, etc.) at the time of proposal, it shall be called a program structure. A program structure is proposed for the purpose of accommodating future requests for extension or volunteer activities 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.
- e. Project - defined as a “temporary entity established to deliver specific outputs in line with predefined time, cost and quality constraints” (Alonzi, n.d.). An extension service proposal may be considered a project when the total duration of proposed activities is at least 40 hours.
- f. Activity – refers to “an element of work performed during the course of a project [or program] (Simon Fraser University, n.d.). Any extension service proposal that would not qualify as a program or project shall be considered as an activity.

Section 3. Requirements

- a. A proponent that intends to propose an extension PPA shall submit one or more of the following, depending on its complexity and upon the recommendation of authorities:
 - 1. Two original copies of duly accomplished extension service proposal form
 - 2. Duly filled out Extension Service Request Form OR Letter of request from the beneficiary or client with endorsement from the President
 - 3. Results of Research, Baseline Study or Needs Assessment
 - 4. Agreement contract, if available
 - 5. Problem Tree Analysis
 - 6. Logical Framework
 - 7. Line-Item budget
 - 8. Gantt chart
 - 9. Monitoring plan and Indicator tracking table
 - 10. Harmonized Gender and Development Guidelines checklist
 - 11. For non-technical outreach programs (e.g. gift-giving, tree planting), letter of permission to conduct outreach approved by the University President
- b. The requirements shall be submitted taking note of the standard process cycle times as indicated in the Citizen’s Charter or other relevant issuances to give ample time for evaluation and approval prior to the commencement of the extension PPA.
- c. Emergency proposals, which are proposed projects or activities that warrant immediate implementation to address pressing issues, may be considered for approval despite violation of submission deadlines. A justification letter addressed to the President must be submitted along with the requirements, except for situations involving calamities, natural disasters, and other events or similar magnitude.

- d. An extension service delivered without a submitted and approved proposal may still be credited as an accomplishment of a college, center, or office, but the extensionists or volunteers involved shall not be eligible for incentives, privileges, or credit.
- e. For students, alumni, other external stakeholders, or employees who will not request for credit or any incentives, submission of a proposal and pre-implementation requirements for the conduct of volunteer PPAs shall be optional.

Section 4. Appointment of Extensionists and Volunteers

- a. The appointment of an employee as an extensionist or volunteer to deliver extension PPAs shall satisfy the following conditions:
 - 1. Expertise must be aligned to that required for the project, except for non-technical extension services
 - 2. Willingness and commitment to deliver the extension services
 - 3. Must not be related to the beneficiaries or clients up to the fourth degree of affinity or consanguinity or must not have any business interest with them
- b. The appointment of an employee as an extensionist or volunteer shall be made official through the issuance of one of the following:
 - 1. A special order for employees that are entitled to certain remuneration (e.g. honorarium coming from a funding agency that transferred external funding to TSU through a trust fund), to be approved by the President
 - 2. A work order for employees who will render services on official time or voluntarily, to be approved by the VPRIE
- c. For volunteer PPAs, provisions (a) and (b) under the same section shall not apply to students, alumni, external stakeholders, or employees who will not request for credit or any incentives.
- d. Guest extensionists
 - 1. Guest extensionists, or persons who are not employees of the University, may be invited to deliver extension services under the following conditions:
 - a. no employee in the University possesses the necessary expertise, competence, or skill to deliver the services needed;
 - b. their expertise is essential to the attainment of the goals and/or objectives of the PPA; and
 - c. their service should be solely for extension purposes and should not in any way address capacity building of University employees.
 - 2. Inviting guest experts for a fee shall only be allowed if there are no available experts from institutions that could provide the same services for free (e.g. through partnerships).
 - 3. If a guest expert is entitled to receive honorarium, government accounting and auditing rules and regulations shall apply.

Section 5. Evaluation and Approval

- a. Only extension service proposals with request for internal funding that must be included in the extension PPMP shall undergo evaluation by the EAC. All other proposals shall undergo expedited evaluation and approval processes.
- b. Due to limitations on extension funding, proposals for internal funding shall undergo prioritization, if necessary. All proposals submitted within a budget cycle shall be assigned priority levels based on the average scores they obtained from the evaluation conducted by the EAC. Those with higher scores are more likely to secure internal funding. If two proposals of the same priority level are vying for the last remaining funding, the funding shall go to the proposal with the higher average score, unless the proponents come into an agreement to split the funding accordingly. Assignment of priority levels shall be based on the scale below.

Table 2
Prioritization Scale

Score	Priority Level
94.00 - 100	1
87.00 - 93.99	2
80.00 - 86.99	3
79.99 and below	Not eligible for internal funding

- c. The implementation of an extension PPA may commence upon approval of the proposal by the University President.



Chapter X. Extension Service Implementation

Section 1. Scope. This chapter shall cover all extension programs, projects, or activities, whether internally or externally funded.

Section 2. Start of Implementation

- a. **Notice to Proceed.** An NTP shall be issued to the proponent for the cases discussed below to signify that they are authorized to start implementing the extension program or project, subject to the availability of the requested funding.
- 1. For internally funded long-term extension programs or projects, the OUES Director shall issue the NTP to the proponent.
 - 2. For externally funded extension programs or projects, the external funding agency shall issue the NTP to the proponent, unless otherwise specified.
 - 3. For jointly funded extension programs or projects where the external funds are transferred to the University, the NTP shall be issued by the appropriate authority, which shall be decided upon based on several factors including the percentage of funding provided by each institution and the origin of the program or project (i.e. University-initiated or a call for proposal from an external agency), among others.
- b. For all other cases not specified in the section above, the OUES shall provide a copy of the approved and signed proposal to the proponent to signify that they are authorized to start implementing the extension PPA.

Section 3. Credit Hours for Faculty Members

- a. A faculty member may earn the following credit hours for rendering expertise-based as well as non-technical extension services specified below, which may be used for the purposes of performance review, reclassification, and counting of volunteer hours, among others. Extensionists and volunteers who do not need credit hours may as well reflect the roles in their PPA documents.

Table 3
Roles of Faculty Members and Corresponding Credit Hours

Role	Description/Scope of Work	Credit Hours	Applicable Category in JC3
a. Program/Project Head	Overall management of a program/project with a duration of at least 6 months	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. Program/Project Component Head	Management of a program/project component with a duration of at least 6 months	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. Project Coordinator	Overall coordination of an extension project that consists of at least 3 activities	25% of the total actual number of project hours rendered but not to exceed 10 hours per month	KRA III Criterion B.2 (2 points)
d. Speaker	Provision of expert services in a training course, seminar, or workshop as Resource Speaker, Keynote Speaker, Plenary	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	KRA III Criterion B.1.5 (2 points per hour for local; 3 points per hour for international) *For volunteer lecturers in classes that are part of students' curriculum:



Role	Description/Scope of Work	Credit Hours	Applicable Category in JC3
	Speaker (Including Lecturer and Reviewer for licensure exams); Benchmark number of participants is 25	participants are split into two or more classes.	KRA III Criterion B.2 (2 points)
e. 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)
f. 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) For expertise-based outreach activities: KRA III Criterion B.2 (2 points)
g. 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)
h. 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)
i. Media Expert	Provision of services as Writer in newspaper columns, Host of TV or radio program, or Guest Technical Expert in print, broadcast or online media	Actual number of hours rendered	KRA III Criterion B.1.4 (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)
j. 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	Actual number of hours rendered	KRA III Criterion B.1.3 (8 points for local, 10 points for international)



Role	Description/Scope of Work	Credit Hours	Applicable Category in JC3
	Expert, Writer, Developer, and the like)		
k. Non-Technical Facilitator	Provision of services that DO NOT substantially involve expertise, e.g., provision of assistance to expert service providers, preparation of documents, serving as master of ceremonies, operation of audio-visual equipment, gift-giving, clean-up drive	For outreach activities: Actual number of hours rendered pro-rated by the number of beneficiaries if less than 25 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

- b. For the purposes of performance review and counting of volunteer hours, the number of credit hours earned by a faculty member for extension services rendered shall reset every rating period.
- c. The number of credit hours of extension services required of a faculty member per rating period for the purpose of performance review shall be based on the guidelines set forth by the appropriate committee.
- d. A faculty member may be entitled to receive additional credit hours for preparation tasks (e.g. preparation of documentary requirements before and after project implementation), which is equivalent to the total number of hours of the extension project or activity but not to exceed 16 hours.
- e. In the absence of the conduct of expertise-based extension services, a faculty member may only earn a maximum of eight (8) credit hours of non-technical extension services per rating period. For every additional hour of non-technical extension service rendered in excess of 8 hours to be credited, the faculty member shall render an hour of expertise-based extension service.
- f. The number of credit hours due a faculty member for the conduct of an extension 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 work order, and shall only be granted upon submission of required documentation.
- g. Any additional hour of extension service rendered by a faculty member, on top of his or her mandated number of extension hours per rating period as stipulated in the faculty manual, shall be credited as a volunteer hour.

Section 4. Modifications

- a. If the proponent intends to make any modifications to an extension PPA that was approved by the University President, the following processes below shall be undertaken, whichever is applicable, and the request for modification shall be approved by same person.

1. Replanning

- a. Replanning shall be conducted if substantial changes are to be made in an approved long-term extension program or project.
- b. The proponent shall submit a revised proposal along with other necessary requirements that reflect the proposed modifications.



c. Replanning shall be allowed six months after the issuance of the NTP or the approval of the proposal, whichever is applicable, and every six months thereafter.

2. Budget Realignment

- 1. Request for budget realignment shall be made if the proponent wishes to realign unused funding in an approved extension PPA to cover expenses on other items.
- 2. Budget realignment may be requested only once per year.

3. Request for Amendment

- a. A request for amendment shall be made by the proponent to propose minor modifications on the following PPA elements:
 - 1. Extension of implementation dates/duration
 - 2. Additional funding (for exceptional situations)
 - 3. Replacement or addition of extensionists or volunteers for the same activity
 - 4. Others as deemed allowable
- b. A request for amendment may be made only once for extension activities and projects with a duration of less than six months and once every six months for long-term extension programs and projects.
- b. Any proposed modifications to an extension PPA that was approved by an external funding agency shall be requested to the agency following its processes.

Section 5. Cancellation and Termination. A proponent that wishes to cancel an unserved PPA or terminate an unfinished one shall request such in writing, addressed to the University President or the head of the external funding agency, whichever is applicable. The reason/s for cancellation or termination must be clearly explained in the request and evidence that the beneficiary or client concurs with the cancellation or termination shall be provided.

Section 6. Evidence of Implementation. The proponent shall ensure proper and complete documentation of the implementation of their extension PPA, which shall consist of one or more of the following evidence depending on the level and type of extension service delivered:

- a. Program
- b. Report of Attendance
- c. Consultation Report
- d. Photographs
- e. Travel Order
- f. Certificate of Appreciation or Recognition
- g. Other relevant evidences

Section 7. Progress, Accomplishment, and Terminal Reports. Aside from the documents enumerated in the previous section, the proponent shall prepare and submit one or more of the following, as applicable:

- a. Progress Report – shall be submitted quarterly in the case of programs or projects that span at least six months
- b. Accomplishment Report – shall be submitted at the end of every implemented activity proposal or project proposal whose activities were proposed in detail in a single proposal
- c. Annual Accomplishment Report – shall be submitted at the end of each year to highlight the year-long accomplishments under a program structure
- d. Terminal Report – shall be submitted at the end of a program or project whose component activities were proposed individually; may also be submitted by any proponent who intends to share more comprehensive information regarding their project, e.g. summary of all activities conducted, outcomes, successes, and challenges, among others



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Chapter XI. Extension Service Monitoring and Evaluation

Section 1. Scope. This chapter shall cover all extension programs, projects, or activities, whether internally or externally funded.

Section 2. Monitoring. Extension services shall be monitored to ensure smooth and proper implementation. At least one of the following elements shall be involved when monitoring extension programs and projects:

- a. Field visits – monitoring personnel visit locations where extension activities are being conducted
- b. Progress reports – aside from reporting the rate of accomplishment, progress reports are used for monitoring programs and projects in terms of compliance to client requirements, adherence to timelines, and problems and issues encountered.
- c. Monitoring plan – this document guides monitoring personnel when monitoring long-term extension programs and projects

Section 3. Client Satisfaction. A client satisfaction survey shall be administered among beneficiaries or clients at the end of each extension activity to be used for various purposes such as assessment of the quality of extension services provided, decision making regarding future extension services, and employees' performance evaluation and promotion.

Section 4. In-House Review of Completed Projects and Implemented Programs. The OUES shall organize an In-House Review of Completed Projects and Implemented Programs once a sufficient number of entries is reached. The activity aims to examine and assess extension programs and projects in terms of their merits, lessons learned, and areas for improvement, among others.

Section 5. 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 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.



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Chapter XII. Externally Funded Extension Programs, Projects, and Activities

Section 1. Management of Externally Funded Extension PPAs. 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 PPAs, whether fully or partially funded, if the external funding is transferred to the University. These include provisions on proposal presentation, agreements, transfer of funds, reporting and documentation, and monitoring and evaluation.

Section 2. Documentary Requirements

- a. For extension PPAs 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. The proponent shall submit to OUES a copy of the documents for purposes of issuing a special/work order, monitoring of the PPA, and recordkeeping, among others. Additionally, the proponent shall prepare and submit documentary requirements specific to the University, if any.
- b. 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 memorandum of agreement.



Chapter XIII. Extension Planning and Performance Reporting

Section 1. Extension Planning Cycle. The preparation of the university extension plan shall coincide with the planning and budgeting calendar issued by the OUP for each year. For this purpose, the University Extension Planning Cycle shall be based on the following guidelines and schedules.

a. Submission and Evaluation of Extension Program and Project Proposals

- 1. Extension program and project proposals shall be prepared and submitted by proponents following the prescribed proposal forms.
- 2. OUES shall accept and evaluate proposals throughout the calendar year. For funding consideration, proposals shall be submitted until June of the current year for the proposals to be funded in the year after the succeeding one (i.e. if the proposal is approved by June 2025, it will be funded in 2027).
- 3. Proposals that require funding and are submitted beyond the cut-off period shall be considered in the next budget cycle (i.e. if the proposal is submitted by July 2025, it will be considered for funding in 2028).

b. Cascading of Extension Targets

- 1. OUES shall cascade extension targets of the colleges, centers, and offices for the year after the succeeding one every August of the current year, following the targets provided by the OUP.
- 2. The cascaded targets shall be the basis for the preparation of the strategic and action plans of the colleges, centers, and offices.
- 3. Deans and directors shall be responsible for the cascading of targets to their respective colleges, centers, and offices.

c. Submission of College/Center/Office Annual Extension Plan

- 1. Colleges, centers, and offices shall submit to OUES their strategic and action plans with budget proposals and PPMP for the year after the succeeding one every September of the current year.
- 2. Any approved extension program or project proposal shall be integrated into the plans, budget proposals, and PPMP of the colleges, centers, and offices.
- 3. Plans with budget proposals and PPMP shall be prepared by the Extension Department Heads using the prescribed university planning forms.

d. Submission of Annual University Extension Plans

- 1. The University Extension Strategic and Action Plans with budget proposals and PPMP for the year after the succeeding one shall be prepared and submitted by the OUES every October of the current year to the Office of Planning.
- 2. The plans shall include the consolidated plans from the various colleges, centers, and offices.
- 3. The approved plans shall be the basis for the performance measurement of the extension mandate of the University.

Section 2. Preparation and Submission of Performance Reports. The preparation of the University performance reports shall coincide with the performance review calendar issued by the OUP each year. For this purpose, the University extension performance reporting shall be based on the following guidelines and schedules.

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- a. **Extension PPA Accomplishment Report.** A proponent shall prepare and submit extension PPA accomplishment reports to their respective extension departments which shall later forward the same to the OUES not later than 10 working days after the conduct of the activity. Additionally, for projects with a duration of more than 6 months, the proponents shall prepare and submit quarterly progress reports on or before every second Friday of the succeeding quarter.
- b. **College-Based Extension Department Quarterly Accomplishment Report.** The CEDH shall prepare and submit quarterly college accomplishment reports to OUES on or before the first Friday of the succeeding quarter.
- c. **OUES Quarterly Accomplishment Report.** The OUES shall consolidate the reports submitted by the CEDH along with its quarterly accomplishments and submit them to the VPRIE on or before the second Friday of the succeeding quarter.
- d. **Quarterly Extension Performance Report.** The OUES shall prepare and submit quarterly extension performance reports based on the data and information consolidated from the quarterly accomplishments of the office and the college-based extension departments. This report shall be submitted to the VPRIE on or before the second Friday of the succeeding quarter.
- e. **Midyear Extension Performance Report.** The OUES shall prepare and submit midyear extension performance reports to the OUP through the VPRIE and Office of Planning, on or before the first Friday of July.
- f. **Annual Extension Performance Report.** The OUES shall prepare and submit annual extension performance reports to the OUP through the VPRIE and Office of Planning on or before the first Friday of January of the succeeding year.
- g. **Other Reports.** The OUES shall prepare and submit other reports as required by the following internal and external interested parties, among others:
 - 1. Office of the University President
 - 2. Office of the Vice Presidents
 - 3. Office of Finance
 - 4. Office of Internal Audit Services
 - 5. Commission on Higher Education (CHED)
 - 6. Department of Budget Management (DBM)
 - 7. Local and International Accrediting Bodies
 - 8. Extension Benefactors
 - 9. Partner Agencies and Organizations



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Chapter XIV. Communication Strategies

Section 1. Purpose. This chapter aims to establish clear, consistent, and effective communication strategies for the dissemination of information in relation to the extension mandate and extension PPAs of the University. This includes sharing of resources and relevant information with both internal and external stakeholders through the OUES. The goal is to ensure that all communication efforts contribute to achieving the university’s broader objectives and fostering positive engagement with 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. All communication related to extension must align with the university’s vision, mission, and institutional goals.
- b. Communication materials related to extension shall 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.
- d. The Publication and Communication Department shall be responsible for overseeing the development, implementation, and monitoring of communication activities related to extension services.

Section 4. Data Privacy and Confidentiality. To maintain trust and uphold legal and ethical standards, all communications will adhere to strict data privacy and confidentiality protocols of the University, if necessary.



Chapter XV. Extension-Based Paper Presentation and Publication

Section 1. Purpose. This chapter to encourage extensionists to present and document extension-related efforts through paper presentations and publications. These activities help disseminate knowledge, support evidence-based practices, and promote public engagement by sharing new findings with both academic and non-academic audiences.

Section 2. Types of Extension-Based Paper

- a. Extension Best Practices – showcase successful models, methodologies, and approaches in extension services which led to positive outcomes
- b. Baseline Study – documents the current status or conditions of the subjects’ population or area to obtain data necessary for program planning and serves as a foundation for future assessments and comparisons in measuring progress, outcomes and/or impact
- c. Impact Assessment Study – evaluates the effectiveness of PPAs or any interventions by measuring their impacts on the beneficiaries or clients
- d. Others – Includes any other types of papers related to extension activities, such as case studies, policy briefs, research articles, or program evaluations, that do not fall under any of the categories above but are valuable for sharing knowledge, experiences, and findings

Section 3. Avenues for Presentation and Publication

- a. **Internal** – The OUES shall conduct the In-House Review of Completed and/or Ongoing Extension Programs and Projects and publish the Extension Journal, subject to the volume of extension programs and projects that come into completion and the availability of funding, among other considerations.
- b. **External** – Authors and/or presenters of extension-based papers may present and/or publish their works in local, regional, national, or international conferences and/or publications, subject to applicable University policies and availability of funding.

Section 4. Funding

- a. The OUES shall include funding for presentation and publication in its annual budget to cover payment of registration, presentation, and publication fees, transportation and travel expenses, and other related expenses of plantilla personnel who qualify for presentation and/or publication.
- b. The provision of funding for presentation and publication shall be subject to the evaluation of appropriate authorities and availability of funds.

Section 5. Guidelines. To ensure consistency and quality in preparing, presenting, and publishing extension-based papers, proponents shall adhere to applicable internal and external policies and guidelines.



Chapter XVI. Privileges, Incentives, Awards, and Allowances

Section 1. Purpose. This chapter contains provisions that may apply to OUES personnel, department heads, program/project heads, technical staff, extensionists, and volunteers to motivate them to work hard and remain focused on the realization of extension 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 UEREC 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-related matters (except for the delivery of extension PPAs) 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 accomplishments of a faculty member may be used to earn points for faculty promotion, subject to applicable guidelines.

Section 6. Incentives for Extension-Based Paper Presentations and Publications. Plantilla personnel who present extension-based papers in the Extension In-House Review of Completed Programs and Projects and in conferences as well as publish in journals may qualify for cash incentives and/or certificates of recognition, in accordance with approved University guidelines.

Section 7. Awards

- a. **Internal Awards.** Awards shall be given to recognize and reward extensionists and volunteers as well as extension programs and projects for their outstanding contributions to the development of communities and the society, in accordance with approved University guidelines.

- b. **External Awards.** The OUES shall proactively seek opportunities for the University’s participation in external awards and competitions relating to extension 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-related functions or engage in extension-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.



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Chapter XVII. Final Provisions

Section 1. Implementing Guidelines and Forms. The necessary guidelines 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 guidelines that require approval from the TSU BOR, all guidelines and forms shall be approved by the University President.

Section 2. Review and Amendments. This manual shall undergo review annually.

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. The provisions of this manual shall take effect upon the approval of the TSU BOR.



Prepared by:	Reviewed by:	Approved by:
ENGR. EMIR LENARD S.F. SICANGCO Director, OUES	DR. ERWIN P. LACANLALE VP, RIE	DR. ARNOLD E. VELASCO University President

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