

Joint Council of Extension Professionals
Regional Leadership Workshops
“Creating a Vision for the 21st Century”
February, 2001

Executive Summary of Strategic Planning

Introduction

In February 1999, the Kellogg Commission on the Future of State Universities and Land-Grant Colleges issued a report titled “Returning to our Roots: the Engaged Institution.” This seminal report provided challenges and opportunities to the Cooperative Extension Service. Specifically, the Kellogg report determined that “it is important to consider how to reshape cooperative extension so that it develops into what it has always had the capability of becoming, a powerful organizing center for total university engagement” (p. 35).

The Joint Council of Extension Professionals (JCEP) rose to the challenge and focused its regional leadership workshops on the “engaged institution” theme, defining the role of Extension, and the professional associations in this emerging movement. Workshop participants were primarily state presidents and presidents-elect of their respective Cooperative Extension professional associations.

The following associations are members of JCEP: NAE4-HA (National Association of Extension 4-H Agents), ANREP (Association of Natural Resource Extension Professionals), NACAA (National Association of County Agriculture Agents), NEAFCS (National Extension Association of Family and Consumer Science), and ESP (Epsilon Sigma Phi).

Procedure and Objectives

Four regional JCEP Leadership Conferences were held across the United States with over 350 participants in attendance. The four sites were selected to utilize the educational expertise and resources of universities that are actively involved in the engagement process. Thus, the site selection for all four workshops was intentional and strategic. The first group met in Pennsylvania at the Penn Stater Conference Center and Hotel on February 2, 2001. Group two met at The Governor Hotel in Portland, Oregon on February 5, 2001. Group three met in Athens, Georgia at the University of Georgia Conference Center on February 23, 2001 and group four met at the West Des Moines Marriott in Des Moines, Iowa on February 26, 2001.

To initiate the discussion, regional workshops included the following key speakers who could inform participants about the critical elements of engagement or the engaged university:

- Dr. Ted Alter, Associate Vice President for Outreach and Cooperative Extension and Director of Cooperative Extension, Pennsylvania State University.
- Dr. John Byrne, President Emeritus, Oregon State University and Executive Director, Kellogg Commission
- Dr. Lyla Houglam, Director of Extension, Oregon State University
- Dr. Gale Buchanan, Dean and Director, College of Agricultural and Environmental Sciences, University of Georgia
- Dr. Fred Harrison, Dean and Director, College of Agriculture, Home Economics and Allied Programs, Fort Valley State University
- Dr. William Lambert, Associate Dean for Extension, University of Georgia
- Dr. Karen Holbrook, Vice President and Provost, University of Georgia
- Dr. Stanley Johnson, Vice-Provost for Extension, Iowa State University
- Dr. Rollin Richmond, Provost, Iowa State University.

The JCEP regional workshops presented a unique opportunity to lead deep discussions about the engagement process and the role Extension could play in advancing this concept—from idea to reality. The wisdom represented in the workshops provided a forum to build a mechanism for the Extension System to move to a new level.

Using a unique technology, each regional group engaged in collective brainstorm sessions using the GroupSystems software in conjunction with a portable computer lab provided by Pennsylvania State University. Working in small groups, this software provides an environment where ideas can be generated instantaneously and anonymously. In addition, participants are able to add onto comments by other groups and can provide clarifying information during the process.

The purpose of these facilitated sessions was to collect information about the following questions:

- What are the three to five key components of a high quality Cooperative Extension program in an engaged university?
- What roles should Extension educators play in the engagement process?
- What are the three to five competencies needed of Extension staff to deliver high quality educational programs in an engaged university?
- What are the three to five barriers to Extension educators taking the lead in the engagement process?
- What role should state or national professional associations play in supporting and/or leading the process of engagement?

Through a facilitated process each of the groups organized the brainstormed results according to themes or categories. A comprehensive report titled *Joint Council of Extension Professionals Regional Leadership Workshops “Creating a Vision for the 21st Century” February, 2001 Regional Summaries of Strategic Planning* is available that provides a means

to disseminate the data collected during the four sessions. The following section provides highlights and a summary of the four region's sessions.

Data Summary

High Quality Programs

Question addressed: Please identify what you believe are the three to five key components of a high quality cooperative extension program in an engaged university.

There was great consistency across all four regions about the elements that make high quality Extension programs in an engaged university.

1) Grassroots-based, local needs

High quality programs must be based and grounded in the needs of local people. Only if our programs are relevant to the needs and interests of local people will we continue to be viewed as a critical partner in improving the quality of life. Extension can help universities reach beyond their self-interests and into communities to actively engage local people in a dialogue about solving critical issues.

In addition, high quality programs need to address concerns of non-traditional audiences rather than simply focusing on the needs of traditional clientele. If Extension is to lead the engagement process, we must broaden our horizons to actively partner with all people at the local level.

Participant observations:

- Grass roots connections should take into consideration the needs of all the people, not just the agriculture-related groups or traditional clientele.
- Grassroots developed needs (local ownership) are communicated to the University so that the information coming back through the two-way pipeline addresses the true local needs.
- Extension helps to determine the needs of the people and carries these needs to the appropriate campus department which then responds.
- We must be customer-oriented: grassroots, local issue priorities; willingness to embrace new clientele; programs need to be responsive and specific to the clientele, not canned programs.

2) Communications

Communications at all levels of the system are critical to high quality programs. Communications, both internal and external, are essential. For example, if Extension is to have high quality programs that meet the needs of local people, "there needs to be effective communications so administration and staff are on the same page programmatically."

Participants also focused on the importance of a cohesive approach to the dissemination of information about the engagement process to all stakeholders. Participants readily acknowledged that Extension can provide a link from the entire university to all people. Extension professionals have their fingers on the pulse of people in the counties and can be an effective conduit of information. Additionally, they can dialogue for an engaged university dedicated to high quality programs.

Participant observations:

- Good communication across the system and with the clientele
- One of the most important components of communication is that local input should be carried all the way to the top to assure that programs are not ‘top down,’ but ‘bottom-up’
- Making sure all resources at the university are available--not just college of agriculture
- Outreach programs that should be visible, accessible, and client need based

3) Impact

High quality Extension programs within an engaged university must be able to demonstrate impact. These impacts should be immediate, verifiable and sustained. Thus, Extension programs can be accountable with the engagement process for ensuring that its programs are not trivial or fleeting, but touch the deep-seated needs of people and help improve their lives in measurable and tangible ways.

Participant observations:

- Unbiased research-based information, resource development, marketing—actively involve the people in the research. If research is not relevant, it is useless.
- Resources and commitment are there from the leadership. The university systems are flexible both in response and procedures.

4) Partnerships

Another theme that surfaced across the groups as an element of high quality programs was the importance of partnerships. In particular, several comments focused on creating sustainable partnerships across multiple disciplines, colleges or schools, and departments of an engaged university. Developing partnerships for high quality programs must occur outside the walls of the academy. Partnerships with businesses, organizations, and other educational institutions are critical to high quality programs.

Participant observations:

- Partnerships among local and state professionals—all need to be involved and equally valued in decision-making.
- Extension links partners outside the University in programming to meet the needs of the people.
- Partners in full—trying to work better with partners in the field, the university and across state lines.

- Include all educational institutions (i.e. land-grant 1862, 1890, 1994, other four-year schools, community colleges, etc.) used as partnership with citizens of the state
- Strong and sustainable partnerships both internally and externally

Roles

Question addressed: What roles should Extension educators play in the engagement process?

The second question addressed by participants was in regards to the roles that Extension faculty could play in the engagement process. Two common themes developed out of this discussion.

1) Educators as Facilitators

The most common role that Extension educators can play in the engagement process is as facilitator—one of the traditional and fundamental roles played by Extension over the decades. As a facilitator, Extension faculty and staff can help draw out the needs of people without directing or leading the discussion. Extension professionals are often seen as “of the university” but not “in the university,” giving us an objectivity and distance which helps us retain credibility with local people.

By playing a facilitating role, rather than a leading, one, Extension educators can also effectively develop local leadership, freeing Extension professionals to move on to the next issue or need. As one participant observed, we can “graduate ourselves from a group as the other committee members develop leadership.”

Participant observations:

- Extension can be a catalyst—to make it happen.
- Extension can be the engine rather than the caboose.
- Extension needs to be the ‘glue’ that holds the collaborations together and facilitates the process.
- We put the ‘wheels’ under the idea or program direction. We can help local people engage in the university system.
- We bring groups together because we are a neutral party; Extension can serve as liaisons between university and the public to provide true two-way communication
- Facilitate the transfer of information between communities and the university; ensure relevancy and responsiveness

2) Educators as Leaders

Extension educators, while functioning as facilitators and resource-brokers, should also play the role of a leader in the engagement process. This leadership role is critical in bringing information to the university from local clientele.

Participant observations:

- Communicator of grass roots needs to the university
- Change the mindset of the institution and get Extension 'on the radar screen'
- Be represented at the decision making 'table' at the University level
- Helping people to become critical thinkers
- Provide essential resources and service which result in increased education and quality of life to the clientele
- County Extension Educators are truly the front door to the University

Extension Competencies

Question addressed: What are three to five key competencies needed of Extension staff to deliver high quality educational programs in an engaged university?

Considering the engagement process, all groups were asked to identify the competencies that Extension professionals will need to be effective in such a movement. Several key themes emerged in all four regions of the country.

1) Communication Skills

Not surprisingly, communication skills surfaced again as a strong theme in this question as it did above in response to the first question. For those of us involved in education, communication skills are fundamental to our work.

Participant observations:

- Be able to document and communicate impact
- Need to be able to translate research based information to our public (clientele and partners) and be able to present it in a way that they can understand and utilize
- Possess ability and willingness to work with diverse audiences

2) Interpersonal Skills

In addition to communication skills, participants identified interpersonal skills as a critical competency for delivering high quality programs within an engaged university. Within this theme, participants specifically identified conflict management, negotiation and listening as key competencies.

3) Leadership

The area of leadership emerged as a prime competency for delivering high quality programs. Specific elements of leadership included the need for flexibility, resiliency and the ability to deal with a changing and, at times, political environment.

Barriers

Question addressed: What are the three to five barriers to Extension educators taking the lead in the engagement process?

One of the purposes of the JCEP discussions was to identify opportunities and barriers in leading the engagement processes in their states. This question helped participants focus on the realities that might impede or slow their leadership in this movement. This question was an attempt to focus on the everyday challenges and barriers taking a leadership role in engagement.

1) Lack of resources

Not surprisingly, lack of resources was identified as a common barrier. Participants identified two primary obstacles: financial resources and human resources.

Participant observations:

- Work load saturation—too much to do and not enough time
- Source of funding dictates program direction

2) Tradition and Turf

The second theme that surfaced was the issue of tradition and turf issues with the university and Extension. Comments here focused on dealing with long-standing tenure and promotion issues at a university level.

Participant observations:

- Tenure does not recognize Extension's many program efforts
- Promotion/Tenure – There is a need to change system – add incentives
- Turf is a barrier
- Turf issues and resource allocation priorities

3) University Administration

The third theme that surfaced focused on university administration and how Extension educators were impacted by broad administrative actions and policies. Far too often, participants felt that administrators chased easy dollars rather than operating from a position of vision or mission. As a result, there is a lack of unity of purpose or sense of common goals among various university constituencies. At the same time, participants recognized that they needed to support Extension and university administration “as you work toward an engaged system.”

The following comments illustrate how participants felt that administration can sometimes be a barrier to this process:

- The administration view is not an Extension/outreach view. In addition, some directors don't have any Extension experience. How can you lead a major organization if you don't understand what it is that field faculty is doing?
- There is a real fear of repercussions from Administration.
- Being put in a lock box just when you have gotten out.
- County staff's head is on the chopping block when things go wrong.

- Administrators are more interested in money than in serving the people of the state.
- Administrators dictate policy (top down) to agents.
- Red tape limits our ability to implement programs.

Support the Engagement Process

Question addressed: How can your state association(s) lead and support the engagement process?

This final question was an attempt to bring previous discussions to completion by focusing on action. We wanted participants at this stage of the process to identify specific, concrete steps that could be taken back home to lead the engagement process. What is the appropriate role of state associations in advancing this movement at all levels? What role should JCEP play in the engagement process? What happens from here?

Another purpose for asking this question was to begin to craft a set of action strategies so that the process would continue rather than languish like other reports on bookshelves across the nation. We hoped to engage participants in discussion about the next steps and recommendations for ensuring that they were more than just academic exercises of no consequence.

1) Role of JCEP and Umbrella Organizations

The follow are representative of some of the comments made about the role of JCEP and other Extension-wide organizations:

- Institutionalize JCEP and its relationship with Extension Committee on Organization and Policy (ECOP) and others.
- JCEP link with ECOP, National Association of State Universities and Land-Grant Colleges (NASULGC) to push forward the engagement process.
- Continuing these discussions at all association national meetings.
- Involve JCEP members at the university level—market, sell, identify resources—including faculty who don't understand Extension.
- We need to communicate to Extension administration that we want to be a part of the engaged university.

2) Training and Education

The discussion also looked at the role(s) state associations could take in moving the engagement process forward. A strong theme was identified in the area of training and education. Comments also identified activities that state associations could support and to which they could contribute.

- Suggest meeting as a group with Extension/university administration.
- Communicating to administrators how field faculty could become a viable part of the 'Engaged University'.
- Providing professional development to our members to help them understand what engagement means and its relevance.

- There is a lack of status and respect of Extension in the university system. Tenure doesn't recognize Extension's many programming efforts.
- Associations need to unify and present one solid front

3) Facilitation of Dialogue

Additionally, groups identified collaborative facilitation across stakeholders as an important role that state associations could play in the engagement process.

- Perhaps there needs to be advocacy for a liaison position at each university.
- Associations can provide a vehicle for agents to anonymously provide feedback.
- Associations can act as a firewall between individual agents and administration when controversial issues need to be addressed.
- Provide incentives for collaboration—make it a priority.
- Presidents of associations participate in the faculty senates or university president's advisory council.
- Have a pilot project involving one segment of the university.
- Serve as lobbyists to non-Extension professional groups (on-campus) to promote the engagement process.
- Associations can give input on allocating resources toward engagement.

Final Recommendations and Suggestions

To ensure that this process continues and that real impacts occur, we provided the following recommendations based on the work of over 350 participants from all four regions of the nation. We present our recommendations in two ways—opportunities and challenges.

Opportunities

1) Extension Leadership for Engagement

Extension can and wants to play a leadership role in the engaged university movement. As John Bryne commented in his remarks in Portland, "Extension can be the fighter pilots of engagement." The entire Extension system needs to work to ensure that this vital and proven organization plays a central role in helping universities become engaged—"two-way partnerships, reciprocal relationships between university and community, defined by mutual respect for the strengths of each" (p. 46). Only in this way, will engagement become a core mission of our institutions.

At the same time, Extension must also proceed with caution where engagement is already underway at universities. By stepping up too boldly, others may not welcome Extension's new interest in engagement and may alienate key university players. Every case will be different and every path to engagement will be unique.

How will we know if we have succeeded in this step? As the original Kellogg commission report stated so eloquently, "We will know we have succeeded when faculty

and students at our institutions understand that the land-grant concept is more a state of mind than it is a practical definition of forms of interacting with our communities or special officers responsible for managing the relationships” (p. 47).

2) Identify and Secure Adequate Resources

For engagement to become more than a concept, sufficient and adequate resources need to be developed to support the engagement process. Extension resources in most states are already stretched thin. Extension will require new and rededicated resources to help play a central role in moving the university out into communities in a partnership role. Collaboratively, Extension and university administration should seek funding to support rewarding and nurturing campus partnerships that truly engage community members across each state. As one participant poignantly observed: “We are overworked, underpaid and underappreciated.”

3) Give Incentives for and Reward Engagement

If universities are truly to become engaged, engagement itself must become a priority. Therefore, faculty and staff working off campus with key statewide stakeholders and constituencies must be given incentives and appropriate recognition within the current systems of promotion and tenure. Engagement is everyone’s responsibility, not just those of Extension or Outreach. As the Kellogg report indicated: “We must also find ways to reward the scholar who steps back from her investigation or his contributions to a scholarly audience in his discipline and looks for ways to put that knowledge to work.” (p. 48)

4) Support, Nurture and Strengthen Professional Associations as Key Players in the Engagement Process

For engagement to become a reality Extension should work hard to support, nurture and strengthen the professional associations as the pillars of the engagement process. State associations should take the immediate step of meeting with Extension administrators to share the results of these four workshops and the common themes and outcomes. Associations, for their part, need to work more closely together and present a unified voice and common efforts on behalf of all professionals rather than the narrow or competing individual interests of each association. As one participant observed, all associations can be effective in “educating, motivating and mobilizing association membership to support the engagement process.”

In addition, several times it was mentioned that associations could play a key role in mentoring new agents as well as experienced faculty about engagement and Extension’s role in the process. Associations can facilitate professional development. Associations were also identified as credible organizations to help with drafting new reward and incentive programs for engagement. Associations can also influence or give direction to policy procedures.

5) Advocacy for Engagement

State professional associations should take a leading role in advocating for and fostering the engaged university. Engagement, if it is not to become another buzzword of the day, will need to be encouraged and discussed at all levels of the university. Professional associations, because of their neutral role, can play a leading role in advocating for advancing this movement at all institutions.

In addition, JCEP should continue to work closely with ECOP to ensure the sustainability of this movement at all land-grant universities. The seven-part test of engagement (p. 45) and the Holland Matrix (p. 56) should be used at all universities to measure and evaluate progress towards true engagement.

6) Marketing of Engagement

Each state needs to take responsibility for continuing this work back home. Professional associations, led by the leaders who attended the regional JCEP conferences, should ensure that the Kellogg document is distributed widely, discussed and that action plans are developed on agreed-upon issues and directions. This summary report, or the full report, should be shared with Deans, Directors of Extension, and other key administrators. Professional staff training related to engagement should be offered at annual conferences, trainings and in-services, to ensure a continual discussion of what this movement means for Extension nationwide. Extension administration must agree to the concept of engagement and support it if this work is to be successful.

Within each university, Extension should also take a leading role in educating others on university campuses about the engagement movement as well as changing the campus perspective on the value of engagement activities. We need to communicate with specialists and faculty from other colleges or schools to increase their understanding of engagement.

Challenges

1) Engage All Land-Grant Partners

There is a pressing need to begin to bring the 1890 and 1994 land-grant universities into the dialogue about engagement, ensuring that they are full and equal partners in this movement. These universities are key components of the learning community and should be involved as members helping to chart the steps that will move us all toward engagement as a state of mind. If we are to embody the true spirit and meaning of engagement, we must work hard to include all partners, especially those at the 1890 and 1994 land-grant universities. Doing so effectively will present unique but achievable challenges.

2) Leadership and Vision

At every workshop, several participants raised the challenge to Extension administration to lead the fostering of the engagement process. Many felt that Extension administrators lacked the vision and commitment to move the organization appropriately, and timely, toward the engaged movement. In some cases, participants felt we had already lost the opportunity to lead this movement. In other cases, Extension has been a primary player. The key, as one participant observed, is to “show support of administration as you work toward an engaged system.”

Additionally, some people questioned whether Extension administrators understand that field faculty and staff had a desire to be a part of the engaged university. As one person voiced: “We need to communicate assertively the desire to be involved with the university. We need to speak loudly to project the message.” Another individual commented: “We need to take the ‘high road’ and have a positive attitude regardless of the direction at our universities.”

By and large, a great many of the participants felt that the blinders to engagement were affixed elsewhere. A common refrain at all four regional workshops was that we were “preaching to the choir.” Others—especially Extension and university administrators—needed to buy-in to the concept of engagement and lead it for it to have real meaning. As one participant commented: “We don’t hire enough innovative thinkers. Also the system doesn’t reward innovative staff.” Another participant stated: “If the administration doesn’t want it to happen, it won’t.”

To others, there was a concern with chasing dollars rather than vision and mission leading the way. As a result, Extension faculty feel that they “receive mixed messages about what we should be doing.” Hence, there “is a lack of understanding or misconception of Extension’s mission by the public.”

In still other cases, participants observed that there is not a clear understanding of what Extension field faculty really do, and without this understanding, leadership for effective engagement is just not possible. One individual asked: “How can you lead a major organization if you don’t understand what it is that field faculty are doing?” In addition, there is often a lack of opportunity for field-based and campus-based faculty to meet and work together.

3) Work Toward Diversity

On a number of occasions and at all regional meetings, the issue of diversity and addressing the needs of Extension’s “non-traditional” audiences surfaced as a major topic. If engagement is to be genuine, this process must bring into the discussion all audiences, not just those with which either the university or Extension have become comfortable. We must also use methods and strategies that are appropriate to reaching these audiences.

Ensuring a diversity that is reflective of our demographics continues to challenge Extension and the land-grant universities. In fact, we noted that at several regional meetings, there was

very little diversity in conference attendees. Recruiting leaders from the diverse populations represented in all five of the professional associations needs to become a primary goal.

In the same vein, the engagement process must effectively determine how to plan for tomorrow's audiences of different cultures and backgrounds. As the most recent Census report indicates, American demographics are changing rapidly and in some new ways. Universities must become more globally and culturally aware. Our "history" and traditions that "we've always done it this way" will not carry us into the future very far.

4) Overcoming Resistance to Change

As one can readily imagine, one consistent refrain during these strategic planning sessions was that we've been here before and nothing will change. All the facilitators stressed the importance of this work, however, and continued to emphasize that it was more than a simple academic exercise. Still, the barriers to change are significant and must be accounted for in efforts to move toward engagement.

Despite our role as change agents, we often recognize that we can be resistant to change. As one participant said: "Even in Extension, we lack openness to change." On top of this, there is institutional resistance to change, often pitting academic, outreach and field faculty against one another in the process.

5) Making Changes in the Tenure and Promotion System

A consistent theme at all regional meetings and even in the Kellogg report was that universities would need to change their tenure and promotion guidelines. Moving toward these changes will mean that some fundamental discussions about the role and importance of engagement will need to take place with key stakeholders with the university.

Extension participants in the strategic planning process were less than optimistic about changes being made in current promotion and tenure guidelines. Several participants commented that the current system "rewards only research and campus-based education, not community engagement." Encouraging on-campus faculty to work out in the state has not been effective in creating a two-way dialogue with the citizens of the state. At the same time, Extension personnel feel at a disadvantage in the promotion and tenure process because the on-campus culture does not value or respect outreach and Extension work. This scenario needs to change.

Under the current reward systems, Extension faculty are "not readily recognized as a part of the team" and consequently the feeling is that Extension has become a dumping ground for a variety of agendas. Among Extension faculty at the regional workshops, there was a consistent impression conveyed during the brainstorming process that there is a lack of recognition for the professionalism of Extension educators within the university community. While the hope is that this will change as each university moves toward engagement, there is

still much skepticism. Changes in the current promotion and tenure guidelines represent a significant challenge for universities.

Comprehensive Report

The data from all four regional workshops are also presented in a full report which documents the complete results during the sessions facilitated by Dr. John Park. Due to the advantage of the GroupSystems software, we were able to meet two primary goals: 1) all participants were able to voice their opinions anonymously, and 2) large quantities of data were collected in a relatively short period of time. The integrity of the data is vital, therefore, no changes or adaptations have been made to the data other than the correction of misspelled words and the organization of the information in a more "reader-friendly" format. A complete copy of the comprehensive report is available in portable document format at the NAE4-HA web site <http://www.nae4ha.org/>

For a copy of the Kellogg report, *Returning to our Roots: The Engaged Institution* go to <http://www.nasulgc.org/Kellogg/engage.pdf>

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