Framing Change: Options and Functions for Transforming OSU Extension

Preliminary ideas and concepts for review and discussion

Introduction

The Oregon State University Extension Service currently faces budget challenges due to economic downturns. The organization must reduce its operating budget by at least 15% and potentially more depending on future state revenue forecasts and the outcome of the January vote on measures 66 and 67.

If OSU Extension wants to continue its leadership in creating positive impacts across the state, it must be positioned to ride the economic recovery into a future of growth and development. Extension must advance from a position of strength, engaging stakeholders to resolve critical issues and invest new or re-targeted resources for innovation and impact.

Into the future, Extension will need to operate more efficiently without losing any of its effectiveness as well as adopt a business model that guarantees a stable and vibrant future. The vision for change focuses on the three "R's", reduction, re-set and recovery. Program Leaders are charged with reducing operating costs and managing budgets to reflect the shortfall in this biennium which ends June 30, 2011.

A faculty advisory panel was appointed to address the re-set phase of change, positioning Extension for recovery and future growth. The panel was charged to engage stakeholders and to develop and test a range of structural and administrative options that will position Extension to best serve Oregon and provide a more stable and sustainable organization. The foundation for the panel's work was three white papers completed during the Summer 2009 that give insights into the organizational transformation issues of regionalization, program integration and market value of Extension projects.

Throughout October, November and early December 2009 the faculty panel interacted with Extension stakeholders, gathering input and ideas in a variety of ways. The following interactions produced rich and compelling data:

- 10/20 Extension Leadership and ECAN/MECAN input
- 11/18 County Commissioners/Judges input
- 12/1 Support and Program Staff input
- 12/2 Extension Leadership input
- 12/10 Faculty Survey results

The data advised and guided the faculty panel's work and resulted in the options and concepts now being shared with the organization. Four consistent messages emerged from all data sources and the faculty advisory panel has done its best to honor these key requests:

1. Value and retain the connections and relationships with the community, both geographic and interest-based. Ensure the organization has the capacity/ability to respond efficiently to emerging needs at local, regional and statewide levels.
2. Provide a positive, encouraging work environment for faculty and staff to be successful. Set reasonable and clear expectations and ensure an effective and fair reward structure. Eliminate or minimize supervisor "overlap."

3. Save money for or add value to the organization . . . otherwise, don't create chaos and anxiety for the faculty, staff, volunteers, partners and learners.
4. Stay true to the land-grant mission. Ensure collaboration and cooperation with Extension faculty and non-Extension faculty to bring the resources of the university to bear on the educational needs of Oregonians locally, regionally and statewide.

Current Structure

OSU Extension has worked with the current organizational structure since 1995, when Extension faculty members integrated into departments and units within colleges. During this same time period two different funding models have distributed state and federal resources to colleges for conducting Extension programs. The first model allocated resources to colleges based on an approved staffing plan and required all freed resources to be returned, as made available, to the Extension director for redistribution. The second and current model allocates resources to colleges based on an approved biennial plan of work, with the resources managed by the college for the approved plan of work.

Regardless of the funding model in place, the current organizational structure is heavily reliant on what has proven to be unstable state funding. An over-dependence on state funding makes it difficult to provide a strong and consistent educational commitment to Oregon as well as to respond to expanding or changing needs. It is imperative that an organizational structure and supportive business model be adopted that provides both a reliable source of core funding to address priority needs and a consistent stream of funding for innovation and emerging issues.

The current organizational structure has both strengths and limitations. While many faculty members thrive in an academic unit environment, others find the multiple and sometimes conflicting demands of providing quality program delivery; coordinating volunteers and responding to clientele; launching and maintaining partnerships and collaborative relationships; responding to staff chairs, program leaders and department heads requests; and meeting promotion and tenure expectations overwhelming. Even through the current structure has been in place for about 15 years there remains confusion about roles, responsibilities and supervision. The confusion breeds inefficiencies and creates redundancies. There's the perception of too great a distance between program implementation and decision making authority. Any new organizational structure must address these concerns.

It is without question that Extension faculty and staff have a strong commitment to existing, or sometimes defined as traditional, audiences. This commitment may make it difficult to shift resources to emerging issues or to audiences not currently well served by Extension. A future organizational structure must provide the capacity and ability to be more responsive to emerging needs and new audiences.

The current structure relies on strong staff chairs, who have divergent areas of interests because of a joint program assignment. Staff chairs have varying skills as administrators and the expectations for program may reduce their interest/ability to focus on enhancing their administrative skill set. Staff chairs are "stretched" by the need to maintain relationships, teach, produce scholarship, manage volunteers, and secure funding for their programs and their faculty and staff's programs as well as provide administrative leadership for a team of faculty and staff. County-based faculty members are also stretched by many of the same demands. While there are excellent examples of faculty members cooperating across county lines and around the state for program development, delivery and evaluation, there is limited formal collaboration among counties for addressing priority needs and issues in a planned, comprehensive, and consistent manner.

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Impetus for Change

The current economic environment of reduced resources requires immediate adjustments to operating budgets; however, it is the larger issue of an unsustainable funding model that demands organizational transformation. If OSU Extension wants to continue its leadership in creating positive impacts for Oregon, it must prove itself to be responsive and relevant to the state's highest priority needs. The current organizational structure does not provide enough staffing resilience to meet the expanding needs. New funding sources, a more flexible staffing model, greater program integration and improved operations efficiencies are needed. The mandate for transformation across the university comes from President Ed Ray; however, it is the critical issues facing Oregon that motivates OSU Extension leadership to create a new way of doing business.

This transformation is part of an ongoing evolution that began with the establishment of the OSU Extension Service in 1911, with a mission to apply University expertise toward solving problems in communities across the state. Since that time, the focus of Extension's land-grant mission has changed, just as the population of Oregon has changed. As people moved from rural communities to cities and suburban neighborhoods, Extension has developed new and innovative ways to help people where they live and work. One hundred years ago, Extension classes were delivered across Oregon from the back of a caboose. Now Extension education is accessible online, at all times.   Extension education reaches every corner of Oregon, engaging youth, families, businesses, and communities with useful information backed by Oregon State University research and expertise. As OSU Extension transforms, the land-grant mission provides the compass for new public education, outreach, and engagement to meet the challenges of the 21st century.

Structural Options

What follows are three options that offer organizational and functional re-structuring. Two options are more fully developed; the third is in the early stages of development. The faculty advisory panel wishes to test all three options with the organization. Your input to date has greatly influenced these basic designs, but, at this stage, the options are **primarily a framework** with implementation details and operations to be added later. The panel needs your help in **evaluating the options as framed for fit, utility and viability**. The panel seeks your feedback in order to modify, improve and complete the options purposed.

Each option **begins at the grassroots with community engagement and expands** to include work teams, support systems, administrative operations, program integration and identified barriers. In some cases there are choices within the options, and these may lead you to think of additional choices not yet included. The options outlined may raise more questions than answers at this stage. The panel needs those questions to fill the gaps and create the completed options to be forwarded to the Extension cabinet on March 1. This is just the first opportunity for you to review and react to the options. Once the round table discussions are completed on February 1, the faculty advisory panel will make revisions based on the feedback and host one additional opportunity on February 11 for the organization to provide input before the March 1 submission deadline.

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Option #1

Two Extension faculty members will be assigned to each county, as county support dollars allow. The faculty are preferably academic rank, but could be professional rank with Masters degree preferred in some cases. All county-based faculty members are expected to have an academic home. Each faculty member has a general subject matter assignment (agriculture and natural resources or youth and family) in an assigned county with the expectations to respond to related priority needs within the community. In addition the faculty member has an area-wide assignment that focuses on a subject matter expertise and will provide educational programs and consultation throughout the area on the assigned specialty. The faculty member is responsible for curriculum development, program delivery and impact evaluation, as well as contributes to the scholarship of the discipline and the profession.

Additional faculty members paid on state and federal dollars may be assigned to a county, based on identified needs and availability of funds . These persons could have assignments similar in nature to those noted above, or could have more specialized roles with area assignments. Any faculty member may be asked to serve as a team leader, or principal investigator, for program issues teams. All faculty within the area, collaborating with appropriate state level faculty, will work together to determine the plan of work for the multi-county area.

Strengths Common with other option

- Honors local connections
- Emphasizes area program priorities and collaborative design and development of programs
- Enhances the potential for regionalized marketing, communications, and access
- Better integration of needs assessment, impact evaluation, volunteer management, reporting among faculty
- Increases opportunity for regional grant development and program impact evaluation
- No specific scalability provisions required; additional faculty can be added as dollars permit and needs justify
- Driven by staffing plan based on identified area needs to determine area of specialty
- Tailored to regional needs
- Faculty roles clearly aligned with identified needs
- Uses existing offices to house faculty in counties; can host additional positions (faculty and staff)
- Creates a strong horizontal link for program integration

Strengths Unique to Option #1

- Creates more manageable glide path to implementation
- Greater job security perceived if tenure track or rolling contract
- Offers clarification of roles and responsibilities between county and area faculty
- Has a scholarship component for all academic faculty with an option for professional faculty

Challenges

- Faculty have broad array of duties – burn-out may be an issue
- Faculty may be more focused on the "expert" component of their jobs, and less so on the local general aspects. This would tend to limit outreach to new audiences.
- Faculty may be absorbed by the local general aspects of their jobs, and less focused on the "expert" component. This would make achieving tenure and promotion more difficult.
- Generalist component of these positions could hinder promotion and tenure success
- Requires investment in technology, standardization of technology, technical support & training
- Best supported by area administrator so there are common expectations of all faculty

Some Extension faculty may serve as subject matter experts, with area or statewide assignments:
- Serve "programmatic" regions defined by needs, geography, funding – strategically identified to be efficient and effective
- Could be housed in county, on campus, at agriculture experiment stations, at centers or institutes, or even be mobile, with supervision assigned as appropriate
- Scope of work reflective of programmatic need
- Serves as vertical link for discipline, from county to campus and back again
- Option for outsource to obtain specialty when not needed on a long-term base (short-term contract with OSU department or other institution for assistance)
- Team leadership responsibility (administrative or programmatic) for program issues teams; may be area, state or multi-state
- PhD preferred with significant scholarship expectations
- Creates a strong vertical link for program integration, may be linked to AES, institutes, and centers as well as departments

Local Administration and Supervision

As indicated in the listing of challenges for this option, it is suggested that the option is best supported by an area administrator so there are common expectations for the faculty serving the area.

- Recommend 6 FTE (currently 11.5 FTE with staff chairs and regional directors) be allocated for area administrative positions
- Responsible for program leadership within assigned area; stakeholder relationships; human resource management, including supervising all faculty; collaboration on and monitoring of county budgets in support of area programming
- Serves as lead administrator for faculty within area; creates clear chain of command
- Administers regional support for communications, technology, marketing, grants, development
- Works with program leaders as team to identify issues and solutions
- Support staff could be "area" staff experts (budgets, hiring, database management, web, ….)
- Standardize technology with support
- Maintain Staff Chairs at a minimal (10-20%) FTE appointment to:
  - Build and maintain local relationships,
  - Local budget management
  - Supervise classified employees

Challenges

- No dollar savings, but improves operations and program efficiencies
- Training may be required to ensure area administrators and staff chairs are effective
- Streamlined paperwork processes (electronic signatures) are necessary for effectiveness
- Signature and approval authorities must be clear
- Need to address "county employee" access to state systems (like banner)
- Advisory mechanisms need to be thoughtfully designed (options to consider):
  - County based with county-based faculty member as contact **or**
  - Regional council rotating meeting locations (with PolyCom support)

Option #1 (continued)

Extension Administration for Statewide Operations and Program Impact

- Director of Extension with joint appointment as Vice Provost for Outreach and Engagement: responsible for legislative relationships, national relationships, university relationships, organizational vision and budget development and management
- Associate Director: oversees day to day operations of Extension, supervising area administrators and issue leaders
- Three "issue leaders" aligned with university priorities (healthy people, planet and economy) **or** four around community issues (Agriculture, Nature Resources, Youth & Families, Business & Engineering)
  - o Working for Extension (not colleges), serve as link between campus and field and work across colleges, institutes and other partnerships to address emerging issues
  - o Innovative funds provided as start-up capital to create new and high priority Extension programs
- Two "division outreach leaders" represent interests of Health Sciences and Earth System Science (could expand if other divisions receive core Extension funding)
  - o Serve as link between divisions and Extension administration and work within divisions to support core programs
  - o Core funding provided for Extension programs through colleges/divisions based on plans of work
- Issue and division program leaders will work with area administrators as a team to identify issues and solutions
- Issues leaders and area administrators supervised by the Associate Director, with division leaders reporting to the Associate Director in a dotted-line fashion

Potential Barriers for Option #1: Each of the following has potential to impede implementation of Option #1 for transforming the OSU Extension Service. Thoughtful and specific transition planning will be vital to success. Implementation patience will be required of all. Efforts would need to be focused to create improvements/changes within university practices, procedures and policies listed:

> Currently onerous grant approval process
> Clarity about designation of returned overhead necessary
> Promotion and tenure expectations/process
> Multi-year contracts
> Confusing identity
>> Need to brand better, document success
>> Be clear about purpose; educate OSU administration
> Mis-aligned departmental expectations
> Requires new funding model for Extension

Option #2

Two Extension faculty members will be assigned to each county, as county support dollars allow. The faculty members will have overall responsibilities for local program delivery and management; developing strong local relationships; conducting needs assessment; managing volunteers; and working with program issue teams to match program needs with program development. One faculty member will oversee agriculture and natural resource programs and one will oversee youth and family programs. It is likely that these faculty members will be instructors or professional faculty with Masters degree preferred and will have an academic home in the Division of Outreach and Engagement, not an academic department. A three-year rolling contract to maintain job continuity and program stability is highly desirable. Faculty paid on state and federal dollars and who have a general assignment may be added to a county, based on identified area needs and availability of funds.

Additional Extension faculty members with academic rank will be experts in subject matter that is of highest priority within the assigned geographic area. These area-based experts will be responsible for curriculum development, program delivery and impact evaluation; will contribute to the scholarship of the discipline and the profession; and may serve as team leader, or principle investigator, for program issue teams. The area-based faculty will be housed at county Extension offices where space and resources allow, in response to an area-wide staffing plan.

The county-based faculty and the area-based faculty, collaborating with appropriate state level faculty, will work together to determine the plan of work for the multi-county area.

Strengths Common with other option

- Honors local connections
- Emphasizes area program priorities and collaborative design and development of programs
- Enhances the potential for regionalized marketing, communications, and access
- Better integration of needs assessment, impact evaluation, volunteer management, reporting among faculty
- Increases opportunity for regional grant development and program impact evaluation
- No specific scalability provisions required; additional faculty can be added as dollars permit and needs justify
- Driven by staffing plan based on identified area needs to determine area of specialty
- Tailored to regional needs
- Faculty roles clearly aligned with identified needs
- Uses existing offices to house faculty in counties; can host additional positions (faculty and staff)
- Creates a strong horizontal link for program integration

Strengths Unique to Option #2

- Focuses faculty at all levels on supporting local needs
- Diversifies program delivery
- Increase audience outreach
- Scholarship expected of area-based faculty to be successful with promotion and tenure
- Delineates the respective roles of county and area/state based faculty relative to promotion and tenure
- Promotes working as teams

Challenges

- Creates a longer or more difficult glide path for implementation
- Requires culture change for more collaborative and team oriented programming
- Must have solid support and services (S&S) budget for area-based faculty
- Potential for burnout in large counties

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- Must "protect" county-based faculty members during economic downturns
  - no or limited scholarship
  - multi-year contracts
- County-based faculty must be good volunteer managers
- Requires high quality people be hired at all levels
- Requires investment in technology, standardization of technology, technical support & training
- Best supported by area administrator so there are common expectations of all faculty

Option #2 (continued)

Some Extension faculty may serve as subject matter experts, with area or statewide assignments:

- Serve "programmatic" regions defined by needs, geography, funding – strategically identified to be efficient and effective
- Could be housed in county, on campus, at agriculture experiment stations, at centers or institutes, or even be mobile, with supervision assigned as appropriate
- Scope of work reflective of programmatic need
- Serves as vertical link for discipline, from county to campus and back again
- Option for outsource to obtain specialty when not needed on a long-term base (short-term contract with OSU department or other institution for assistance)
- Team leadership responsibility (administrative or programmatic) for program issues teams; may be area, state or multi-state
- PhD preferred with significant scholarship expectations
- Creates a strong vertical link for program integration, may be linked to AES, institutes, and centers as well as departments

Local Administration and Supervision

As suggested in the listing of challenges for this option, it is suggested that the option is best supported by an area administrator so there are common expectations for the county- and area-based faculty responsible for Extension programs.

- Recommend 8 FTE be allocated for area administrator positions distributed to approximately 12 individuals. This represents a savings of approximately 23% of current costs (currently 11.5 FTE with staff chairs and regional directors)
- Responsible for program leadership within assigned area; stakeholder relationships; human resource management, including supervising all faculty; fiscal management for area's counties
- May have joint appointments (AES)
- Serves as lead administrator for faculty within area; creates clear chain of command
- County-based point person may supervise classified employees
- Administers regional support for communications, technology, marketing, grants, fund development
- Works with program leaders as team to identify issues and solutions
- Provides leadership for statewide "administrative" role (diversity, service districts, performance management, etc)
- Support staff could be "area" staff experts (budgets, hiring, database management, web, ….)
- Standardize technology with support

Challenges

- Training may be required to ensure area administrators are effective
- Streamlined paperwork processes (electronic signatures) are necessary for effectiveness
- Signature and approval authorities must be clear
- Need to address "county employee" access to state systems (like banner)
- Advisory mechanisms need to be thoughtfully designed (options to consider):
  - County oriented with county-based faculty member as lead contact **or**
  - Regional council rotating meeting locations (with polycom support)

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Option #2 (continued)

Extension Administration for Statewide Operations and Program Impact

- Director of Extension with joint appointment as Vice Provost for Outreach and Engagement: responsible for legislative relationships, national relationships, university relationships, organizational vision and budget development and management
- Associate Director: oversees day to day operations of Extension, supervising area administrators and issue leaders
- Three "issue leaders" aligned with university priorities (healthy people, planet and economy) **or** four around community issues (Agriculture, Natural Resources, Youth & Families, Business & Engineering)
  - o Working for Extension (not colleges), serve as link between campus and field and work across colleges, institutes and other partnerships to address emerging issues
  - o Innovative funds provided as start-up capital to create new and high priority Extension programs
- Two "division outreach leaders" represent interests of Health Sciences and Earth System Science,
  - o Serve as link between divisions and Extension administration and work within divisions to support core programs
  - o Core funding provided for Extension programs through colleges/divisions based on plans of work
- Issue and division program leaders will work with area administrators as a team to identify issues and solutions
- Issues leaders and area administrators supervised by the Associate Director, with division leaders reporting to the Associate Director in a dotted-line fashion

Potential Barriers for Option #2: Each of the following has potential to impede implementation of Option #2 for transforming the OSU Extension Service. Thoughtful and specific transition planning will be vital to success. Implementation patience will be required of all. Efforts would need to be focused to create improvements/changes within university practices, procedures and policies listed:

    Currently onerous grant approval process
    Clarity about designation of returned overhead necessary
    Promotion and tenure expectations/process
    Multi-year contracts
    Confusing identity
        Need to brand better, document success
        Be clear about purpose; educate OSU administration
    Unaligned departmental expectations
    Requires new funding model for Extension and a new way of doing business

Option #3

Option #3 emerged during the panel's 1/21/10 work session. The option is not as fully developed as the other two options presented; however, it seems to meet many of the transformation criteria the panel is seeking for viable options. Your feedback in shaping this option is valued.

County Faculty

- Broad area of focus (local relationships, volunteer management, needs assessment, program development and delivery, behavior change)
- Examples: Farming, Natural Resources, Youth, Families, Business
- Non-tenure, with contact length a function of performance (record of excellent performance would lead to 3-year contract, lesser performance would result in shorter-term contract)
- Academic home in Division of Outreach and Engagement
- Report to, and supervised by, Area Administrator
- County support and services (S&S)
- Number of positions based on identified needs within geographic area and availability of funding

Area Faculty

- Narrow area of focus/expertise
- Serves multiple counties within area
- Responsible for curriculum development, teaching, impact assessment
- Scholarship tailored to position – would be identified in PD
- Non-tenure, with contract length a function of performance
- Academic home in Division of Outreach and Engagement
- Area support and services (with primary support from a host county)
- Number of positions based on identified needs within geographic area and availability of funding
- Report to, and supervised by, Area Director

Note: in event of economic downturn/funding limitations, lowest priority and/or lowest performing positions are eliminated.

Specialists

- Statewide or multi-area assignments
- Curriculum development, direct research and/or research connection/interpretation, grant management, leadership on statewide issues, publication. Expected to be responsive to needs articulated from counties/areas
- Tenured
- Departmental academic homes
- Report to, and supervised by, Program Leader
- Strategically located to provide highest level of efficiency and effectiveness
- State support and services

Area Administration

- 8 areas reflecting geographic and political landscape of Oregon
- 8 area administrators, responsible for faculty supervision and performance management, budget development and oversight, human resources, leadership for area planning and advisory mechanisms.
- Each has responsibility for a statewide "specialty" assignment (civil rights, district development, performance management, reporting, professional development, diversity, marketing, fund development)
- Authority to delegate duties to "staff chair" where geographically or politically necessary. Staff chair may receive stipend if duties are significant.
- Delegated duties to faculty throughout area – all expected to contribute to success of their county/area (mentoring, marketing, media, distance education leader, advisory council leadership, civil rights, etc).
- Direct management of budgets for faculty in area
- Staffing plans developed in collaboration with other Area Administrators, Program Leaders and Associate Director.
- Resources allocated based on demonstrated need
- Report to, and supervised by, Associate Director.

Program Leaders

- 4 Program Leaders for Agriculture, Natural Resources, Youth & Families, Business & Engineering
- Supervise specialists
- Direct management of budgets for specialists; secure additional resources
- Identify and coordinate response to statewide (or multi-area) issues
- Collaborate across divisions to bring University resources to bear on issues.
- Prepare annual plan of work for program
- May appoint/hire Project Leaders to oversee specific issue responses, manage large grants, etc.
- Report to, and supervised by, Associate Director

Associate Director

- Direct oversight of Program Leaders and Area Directors
- Oversees day to day operations of Extension Service
- Supervises support unit leaders
- Reports to Director

Director

- Joint appointment as Vice Provost of O&E
- Legislative relationships, national relationships, university relationships, organizational vision, and budget development and authority
- Reports to Provost/President

Extension Administrative Council

- Comprised of Area Directors, Program Leaders, Associate Director
- Works together to develop resource allocation models, collaborative approaches to issues, policies and procedures
- Advises Director

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Extension Faculty Advisory Council

- Replaces Extension Cabinet
- Broadly representative of faculty across levels of organization
- Advises Extension Administrative Council

Strengths

- Places emphasis on meeting needs
- Readily scalable, while maintaining the parts of the organization most needed or best performing
- Eliminates "stretched thin" effect of promotion and tenure
- Clarifies roles at each level of organization
- Draws upon expertise of departments without becoming overwhelmed by departmental expectations
- Puts budget authority at level of implementation
- Facilitates multi-county and statewide collaboration on issues
- Protects capacity to maintain local relationships
- Allocates resources based on demonstrated needs
- Allows shift of resources to address changing/emerging needs
- Strong vertical link within Extension system
- Creates very strong accountability mechanism for faculty response to needs
- Simplifies and clarifies supervision

Challenges

- May disenfranchise colleges/departments
- May reduce credibility of county-based faculty who lack tenure with respect to their interactions with other OSU faculty
- Requires buy-in from county officials
- Would most like reduce emphasis on some audiences, while increasing emphasis for others
- Long glide path, or radical change – no easy way to shift from current tenure-based structure with strong departmental affiliations to performance-based contracts and Extension-driven system.

<u>Organization Functions</u>

In addition to the three organizational structures presented here as options, the faculty advisory panel also explored three organization functions that require transformation if OSU Extension is to be relevant and responsive for the future.

Technology for education and communications

Extension education in the 21st century must meet a variety of public needs and must be communicated in a variety of ways to reach people of different abilities, learning styles, and cultures.

In the near future, more residents will expect to receive information that is portable, brief, graphic, current, and immediately available. Fewer residents will require face-to-face, on-location interaction with experts. And evolving demographics will underscore the need for more diverse educational outreach.

In order to meet these growing needs and make OSU Extension accessible and relevant in 21st century, we will need to make a conscious investment in technology.

Immediate needs

• Need bandwidth and fiber-optic connections in all Extension centers and offices

• Need area collaborative workspace for development of online products

• Need technology to support county-based faculty/staff and volunteers

• Need greater emphasis on statewide or regional websites

• Need training to access local Web sites and post local information

Emerging needs

<u>Beyond 24/7</u>

The world has moved beyond simply making information accessible online. We must now engage people in making informed decisions with the information they have available to them. Extension has the capacity for both face-to-face and online community outreach to preserve local relationships backed by extensive online resources.

• Non-credit online learning

  Extension has capacity with Ecampus to develop non-credit classes and online learning experiences

• Ask an Expert

  Extension has the capacity to pull in new clients through the eXtension "Ask an Expert" database.

  • The database must be easy to use, with high-quality and up-to-date content

  • Faculty contributions to the database must be recognized as service and scholarly work in order to build a responsive network of credible experts.

    • This database could become the basis of new virtual Extension offices

<u>Invest in technology</u>

As demands grow and Extension's footprint shrinks, we will need to focus more of our education delivery on larger, mass audiences, and less on individuals or small groups. With fewer people, we will need to use more communications technology.

> • Increased communications technology requires dedicated staff to support it.

> • Educational communications and technology should be statewide, with regional FTE connected to campus-based specialists.

> • Organizing by areas increases the likelihood of this being possible.

<u>Accessibility</u>

Technology, communications, and accessibility have complex, interwoven meanings in Extension. The following issues were identified during the Leadership Meeting (Dec 2), when asked how to structure Extension for greater accessibility:

1. Localize global information

> • Plan outreach and engagement communications from the beginning so we build what we need. Connect area faculty with communications faculty to develop content that meets the recognized needs of local communities.

> • Place Extension communicators in regions throughout the state to help connect local faculty with appropriate learning technologies, community media, and educational outreach for a variety of audiences.

2. Engage mass audiences with mass media

> • Create opportunities to partner with broadcast media to deliver expert information as a public service in a variety of outlets (TV, radio, news).

> • Create educational material to fit new social media delivery (podcasts, Twitter, YouTube, etc).

> • Engage opinion leaders in delivering Extension information in a form that is easy for them to re-distribute to constituents, students, followers, etc.

> • Focus Extension communications on creating state and regional content, and use our content management system (Drupal) to make that content accessible in every county.

> • Develop content for mobile platforms (PDAs, etc) that can be used in small chunks or aggregated into larger educational materials.

3. Access more diverse audiences

As Oregon's population diversifies, Extension will need to diversify our faculty to represent, and communicate with, many different audiences, cultures, and points of view.

> • Develop educational communications that can be used in multiple ways and test audience responses to measure the success of our multicultural, multigenerational outreach and engagement

• Recruit new faculty and staff who can help Extension engage in diverse learning styles, educational communications, and cultures.

Marketing

Now more than ever, OSU Extension needs a clearly defined identity. With a new organizational structure, even long-time supporters may need help understanding that Extension is still here and serving communities throughout Oregon. And introducing a new structure provides an opportunity to engage new clients and partners.

Immediate needs:

• Need Extension to be readily identifiable on the OSU Web site; we've been buried under Outreach and Engagement at a loss of brand identity.

• Need to reclaim our Extension identity at state and county levels, promote ourselves as a statewide public service, and connect to our Land Grant mission.

Capacity for improved marketing

Extension has developed a set of tools to increase brand identity. They include templates, talking points, and logos, available online and designed to be easy to use. However, tools on a Web site are not useful if they are not used.

Faculty members should purposefully promote their connection to Extension and OSU.

  • Use Extension marketing materials in all educational communications and public presentations.

  • Expect every faculty member to have basic marketing skills/concepts with state or area "experts"

  • "Basic 4": wear your nametag; refer to "*OSU* Extension"; provide one-minute overview of Extension in all presentations; maintain a professional appearance.

  • Reach beyond Extension for marketing expertise – our clientele have skills

Capacity for improved Web presence

Most counties Web sites are now part of a content management system (Drupal) that allows individuals to load content and keep their sites up-to-date.

  • Need to make better use of Drupal content management system in order to standardize web image and content

  • Need to maintain online county identity as users scroll through area specialists' pages.

Capacity for improved media presence

Media presence is a great medium for educational and outreach communications, but it needs to be carefully managed within the guidelines of the University. Extension has developed how-to's to help faculty work with reporters, use social media (Twitter, Facebook, etc), develop blogs and newspaper columns, take better

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photographs and videos, and write local news releases. In addition, Extension sends more than 300 news releases a year to targeted media through OSU's News Wire.

Field faculty and educators can develop local media relations and content for newspaper, radio, TV, and new media to promote Extension.

Revenue

A major focus of a transformed Extension Service is developing a plan to more closely align revenue generated from Extension programs to market value of the programs. Overriding this effort is the larger question of public good versus private good. What activities can and should generate income? And what activities are part of Extension's service mission?

The faculty panel has collected information from surveys and conversation groups, comments that fall roughly into three aspects of the charge: business models, fees, and grants and endowments and will develop a set of options.

Business models

• Need business model for the organization and training to support culture change

• Need business plans for local and area units.

• Need to establish expectations for overhead at local level – what's acceptable?

• Need campus support for tracking funds over multiple years.

• Consider if community college model is a valid comparator?

Fees

• Need flexibility in state guidelines

• Need standardized fees across state; promote one Extension

• Need more transparency at local level to show/justify experiences/fees

• Need to develop online programs with revenue generation in mind

• Need a way to assess online costs and collect fees

• Consider OSU certificate for fee (or CEUs) – talk with others who have been successful with concept

• Consider dedicated taxes on user segments

Grants and Endowments

• Need revenue generating with capital to develop online education products

• Need faculty (or partners) to come with cash for online product development if there is to be no cost to client

• Need grant writing mentorship on area (or state program) level

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• Need a more streamlined sponsored programs process

• Need time built into PD for faculty to be successful at grantsmanship

• Need statewide/area oversight and training for endowments

• Consider area-based faculty member, or area based teams with local budget managers, taking lead for grantsmanship.

• Consider incentives to increase salary with grant dollars

• Consider MOUs to establish the standards for work and outputs

• Develop a template for what's included in MOU