UW-EXTENSION EDUCATION COMMITTEE

Thursday, January 28, 2016
2:00 PM, Room 103
Location: Agriculture & Resource Center
227 1st Street W
Altoona WI 54720

AGENDA

1. Introductions

2. Overview of *nEXT Generation* Model by Northwest Regional Director, Julie Keown-Bomar / Discussion

3. Public Input

4. Q & A

5. Adjourn

Post:

- Media
- Committee Members
- Extension Staff

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Reorganization Recommendations

Presented to
Chancellor Cathy Sandeen
December 21, 2015

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Cooperative Extension Reorganization Recommendations
Presented to Chancellor Sandeen
December 21, 2015
Executive Summary

Introduction

Imagine a Cooperative Extension that addresses local needs, is fiscally responsive and programmatically nimble, transcending geographical boundaries. This is part of Cooperative Extension's vision for reorganization – to be relevant, flexible, and digital. For 104 years, Cooperative Extension has served the residents of Wisconsin, offering educational programs that meet the needs of youth, families, farms, businesses, organizations and communities. Cooperative Extension is a great organization with a proud history. A division of the University of Wisconsin-Extension, Cooperative Extension is located in each of Wisconsin's 72 counties and three tribal nations and invests in staff on five UW campuses.

Reductions to the UW System have resulted in an on-going $3.6 million deficit in Cooperative Extension's annual budget, making the current educational delivery structure unsustainable. Early in 2015, Dean and Director Richard Klemme charged the Cooperative Extension Administrative Committee (CEAC) to develop a framework to address the state budget reduction. Further, the framework should include criteria and key elements for new educational delivery structures built on the foundation of Cooperative Extension's purpose, vision, values and educational priorities.

Feedback received through internal and external surveys indicate now is the time to create seamless educational programming, capitalizing on Cooperative Extension's local presence and campus relationships. Surveys revealed that Cooperative Extension needs to create a "shared Extension space" where campus, administration, county, local and tribal colleagues work together to achieve goals *(See appendix A)*. Colleagues expressed concern about being spread too thin and unable to address priority issues; an interest in focusing educational programs to maximize impact; and maintaining and growing partnerships at the campus, county, tribal and local levels. The county partners expressed the powerful impact of contributions that Cooperative Extension educational programs, educators and specialists make to address critical issues of importance to the people, communities and organizations of Wisconsin.

These survey findings underlie Cooperative Extension's vision for organizational change and highlight the importance of bringing together three organizational components -- local, campus and administrative -- to develop a holistic approach that addresses both budget realities **and** a desire to capitalize on organizational improvements. Through these efforts, Cooperative Extension will strategically reposition itself to remain accountable to clients, partners and funders, and improve its sustainability in a highly-competitive public funding environment.

Where are we now?

The recommendations in this executive summary address organizational changes to sustain funding and retain Cooperative Extension as a dynamic educational institution into the 21st century. Recommendations help Cooperative Extension remain relevant and flexible, to offer trusted and research-based educational programming for youth, families, businesses, farms, organizations and communities in a Digital Age. The planning process will include reallocating resources to fund its highest priorities.

The current Cooperative Extension (CE) FY16 Budget ($82.5 Million) is invested across the state in the following manner. The $3.6 million reduction can only come from the UW Internal Funding category.

<u>UW Internal Funding:</u>	
CE investment in counties/tribal nations	$14.2 million
CE investment in specialists and support	
● 4-year campus Specialists	$13.6 million
● UW-Extension Specialists	$7.0 million
CE investment in administrative support	$8.4 million
<u>County/Federal/External Funding:</u>	
County Tax Levy in Support of CE	$19.7 million
Grants/Contracts/Fees in Support of CE	$19.6 million

<u>These recommendations form the framework for a minimum $3.6 million reduction allocated in proportion to the current investments, resulting in the following *preliminary* targets</u>:

CE investment in counties/tribal nations	$1.2 million
CE investment in campus/UW-Ext. Specialists	$1.7 million
CE investment in administrative support	$0.7 million

These reductions will result in a budget of $39.6 million to allocate across the CE investments in counties/tribal nations, campus/UW-Extension specialists and administrative support.

Where do we want to be?

Cooperative Extension's vision of what we strive to become is a thriving, trusted, well-known and sought-out educational resource that reflects the rich diversity of Wisconsin. By implementing the following recommendations, this focus can be sharpened to be relevant, flexible and digital.

Vision for our future

Our vision for the next three to five years with *nEXT Generation* is as follows.

- To build upon Cooperative Extension's ability to be relevant, flexible and digital to serve communities and the state.
- Cooperative Extension's culture is one that:
    - Values the unique contributions of everyone as members of the Extension community including the workforce, volunteers, partners and funders.
    - Clearly articulates the specific purposes and functions of leadership, administration and governance.
    - Holds both colleagues and the organization accountable for performance.
- Educators, individually and collectively, are focused on the development, delivery and evaluation of programming in service of Cooperative Extension educational priorities, and that best serves the needs of its client communities.
- Campus investments provide critical research, scholarship and educational programming in support of educational priorities and the needs of its client communities.
- Resources are in place to support the collaborative work of county colleagues, specialists, and partners.
- Cooperative Extension colleagues participate in ongoing program development that shapes resource allocation at the local, area and state levels.
- Cooperative Extension is known, trusted, and sought out by other UW institutions, for outreach scholarly work.
- Cooperative Extension has a limited, well-resourced menu of educational delivery methods that expand and contribute toward change in service of the educational priorities.
- A coherent, integrated and effective system is in place that supports all colleagues in their respective roles in educational programming.
- Programming priorities, opportunities and partnerships drive the design, resourcing and performance of core administrative functions and systems such as program leadership, regional leadership, human resources development, information technology, fiscal management, and communications and marketing.

Guiding principles

As Cooperative Extension envisions a future framework, the organization wishes to retain the many important characteristics of culture and transform other aspects of culture to better enable innovation and responsiveness. These core fundamental principles include research-based educational programs; strong relationships with funders and key decision makers; effective communications; fiscal awareness; and political sensitivity. Through planning for the future, Cooperative Extension will foster a culture that:

- Grows capacity to be relevant, flexible, and digital.
- Responds quickly to programmatic needs.
- Provides and contributes to local context and continuity.
- Improves focus of duties, programming and common goals.
- Increases access, equity and inclusiveness in programs.
- Continues the commitment to teach, learn, lead and serve.

- Strives to become a thriving, well-known and sought out educational resource, connecting the people of Wisconsin to the University of Wisconsin and engaging with them to transform lives, organizations and communities.
- Works in service of Cooperative Extension educational priorities.
- Build on program area capacity while strengthening cross-program area work.
- Enhances capacity as an inclusive organization.
- Allows for long-term financial stability and growth while addressing funding cuts.
- Facilitates the ability to self-direct collaboration.

How will we get there?

The *nEXT Generation* Framework will make changes within Cooperative Extension's three major investments: local/tribal/county presence, campus investment, and administration and educational support functions. The goal is to build strong cross-programm area approaches that are guided by educational priorities of:

- resilient and productive environment
- thriving youth, families, organizations and communities
- stronger economies
- food safety, food security and health

Recommended Strategies:

The following recommendations support Cooperative Extension's new vision to be relevant, flexible, and digital. Current UW internal resources of $43.2 million have been reduced to $39.6 million. Initial cuts will occur in the following organizational areas to achieve the vision.

I. Local/tribal/county recommendations (see supplemental visuals): Preliminary Savings goal: $1.2 million

- Implement a multi-county area structure for Cooperative Extension. (*See appendix B)*
- Retain a local presence with an Extension office in each of the existing county and tribal offices.
- Maintain single-county areas in highly populated counties.
- Create a "virtual tribal area" to address the unique needs of Wisconsin's twelve tribal nations. A headquarters for the virtual tribal area should be designated from among the tribal nations.
- Establish positions within single- and multi-county areas with a blend of faculty, academic staff and university staff. (*See appendices C through G)*
- Determine the nature and number of these positions to best serve the needs of the multi- and single-county areas.
- Enhance the use of digital technology to carry out Cooperative Extension's purpose and realize the vision.

II. Campus/UW-Extension specialist investment recommendations: Preliminary Savings goal: $1.7 million

- Strategically reduce the number of campus and Cooperative Extension specialist and associated support positions.
- Reduce long-term FTE funding commitments by 10 percent to allow the ability to redirect and reinvest funding on an annual or multi-year basis to address emerging issues by leveraging additional UW System resources.

- Develop integrated specialist appointments consisting of 60% or more Cooperative Extension base funding.
- Identify and minimize barriers to extramural funding in order to strengthen capacity to develop, submit, and manage grants.
- Design and implement seamless connections between specialists, tribal and local educators and constituents to develop and deliver timely and relevant educational programs.
- Create flexibilities to make adjustments in extension appointments during a specialist's career based on priorities, administrative responsibilities, teaching load and performance.
- Implement digital technology improvements to carry out Cooperative Extension's purpose and realize its vision.

III. Administrative and educational program support recommendations: Preliminary Savings goal: $700,000

- Integrate administrative functions across those funded directly by Cooperative Extension and those embedded in the investments in county/tribal nations and campus/UW-Extension specialists to realize cost savings.
- Strengthen core functions that are most important to align and support our educational administrative priorities.
- Leverage alignment with central administrative operational and business services.
- Invest in technology infrastructure and support to enhance our ability to be relevant, flexible, and digital.
- Reframe how technology, professional development and travel are intentionally supported to ensure relevance, flexibility and enhanced digital capacity.
- Implement digital administrative technology improvements to carry out Cooperative Extension's purpose and realize its vision.

Timeline

Outlining anticipated re-organization project milestones

- Project executive sponsors will send the draft reorganization plan to UW Colleges and UW-Extension Chancellor Cathy Sandeen around December 18.
- Once Chancellor Sandeen has reviewed the plan, she will share it with Cooperative Extension colleagues, county and tribal nation partners and other stakeholders for feedback.
- Chancellor Sandeen will solicit feedback throughout January and throughout the rest of the planning process.
- The chancellor will announce her decisions on reorganization in late January 2016.
- By late January, Chancellor Sandeen will appoint a steering committee, project manager and project lead for planning and implementation.
- Planning will take approximately six months. Colleagues, county/tribal nation partners, clients and volunteers will be fully engaged throughout the process.
- Implementation will begin in July 2016 and continue during the 2016-17 fiscal year.
- Most personnel changes will likely occur in late 2016 and early 2017.

Appendix A

Executive Summary Sheet of Studies in the Context of the Restructuring Effort Christian Schmieder, Qualitative Research Specialist, Program Development & Evaluation Unit

RESEARCH PROJECT SUMMARY

Stage 1: All-Colleagues Survey June/July 2015

COOPERATIVE EXTENSION ADMINISTRATIVE COMMITTEE (CEAC) RESEARCH QUESTION:

WHAT ARE THE THREE MOST IMPORTANT CRITERIA WE SHOULD CONSIDER WHEN EVALUATING DIFFERENT LOCAL PRESENCE MODELS?

CRITERION 1: CONSIDER COLLEAGUES' DESIRE TO PROVIDE LOCAL CONTEXT AND CONTINUITY.

Main questions during restructuring effort: How is UWEX grounding itself in local contexts? What constitutes 'locality'?

This criterion aims at a deeper discussion of what local engagement and locality mean. The data does not give an answer to the latter: Local presence means many different things to many different colleagues. This being said, local presence is a core value for colleagues across the state, both for county-based colleagues and non-county based colleagues.

This being said, the data does answer the research question: The way UW-Extension is grounding itself in local contexts (and an assessment of what locality is) is one of the main elements that should be considered in the restructuring effort.

CRITERION 2: CONSIDER COLLEAGUES' DESIRE TO BE ABLE TO SELF-DIRECT COLLABORATIONS.

Main questions during restructuring effort: What functions should collaborations serve? Where, and how are collaborations self-directed?

Maintaining the ability, the power to self-direct collaborations is a very strong theme in the data. While the theme is common, the intentions behind this desire for agency are multi-faceted, and even contradictory.

Again, the data suggests that this is an issue leadership should engage with when talking about regional presence models. It is especially crucial to discuss more fine-grained definitions of what collaborations are, and what functions they should serve.

Appendix A (cont'd)

CRITERION 3: CONSIDER COLLEAGUES' DESIRE TO BE ABLE TO FOCALIZE DUTIES, PROGRAMMING, AND COMMON GOALS.

Main questions during restructuring effort: What are we focusing on? How does this focus align with resources & support?

This criterion aims at colleagues' desire to do what they are good at, to do what they are passionate about, and to do what they believe is the reason for being in this institution. This criterion is deeply connected to a common notion amongst colleagues: The issue of feeling to be a "Jack of all Trades", and to not be able to focus on the core aspects of their work. Executive Summary Sheet of Studies in the Context of the Restructuring Effort Christian Schmieder, Qualitative Research Specialist, Program Development & Evaluation Unit.

Stage 2: County Partner Survey, September/October 2015

COOPERATIVE EXTENSION ADMINISTRATIVE COMMITTEE (CEAC'S) RESEARCH QUESTIONS:

RQ1: WHAT DOES UW-EXTENSION'S LOCAL PRESENCE MEAN TO A COUNTY DECISION-MAKER? RQ2: WHAT IS IMPORTANT TO OUR UW-EXTENSION USERS WHO ARE DECISION-MAKERS?

RQ1: WHAT DOES UW-EXTENSION'S LOCAL PRESENCE MEAN TO A COUNTY DECISION-MAKER?

County partners who are decision-makers conceptualized local presence predominantly from the perspective of the valuable programming UWEX does or provides.

When we asked our county partners what local presence means to them, over three quarters of them gave us examples of the programming we do. What we are doing, providing, co-creating is the main focus of county partners' answers. This is also reflected in the answers concerning the future of our local presence. A large part of participants saw the future presence in terms of our programming – more precisely, in the continuation and expansion of our programming.

This is not to say that county partners see local presence only as what we do. We had asked very broadly about our county partners' idea about what local presence means to them. Without further guidance through the instrument, many mentioned that local presence is a value for them. Additionally, their answers indicate – similar to the internal survey – a breadth of concepts that can create, determine or shape local presence: For example the way we deliver our programming, or the way we act as a connective hub in, and for the counties.

The emphasis on programming and services, the focus on what we do as a strong perspective could be grounded in the participants' unique professional positions and circumstances as decision-makers, partners, and stakeholders. An additional factor of this prevalence of

Appendix A (cont'd)

programming-as-local-presence could stem from anticipations of negative change in the context of our restructuring effort. It may be possible that the focus on programming may be influenced by the fear of losing programming in the respective counties. This issue is closely connected to the answer to our second question.

RQ2: WHAT IS IMPORTANT TO OUR UW-EXTENSION USERS WHO ARE DECISION-MAKERS?

Our answer to RQ1 anticipates the answer to RQ1. **County partners who are decision-makers predominantly want us to continue and expand the programming we provide.** Throughout the survey, participants emphasize the importance of programming, and express a strong desire that our programming should be continued, or even expanded. Executive Summary Sheet of Studies in the Context of the Restructuring Effort Christian Schmieder, Qualitative Research Specialist, Program Development & Evaluation Unit.

Stage 3: Campus Relations & Administrative Structure Survey, October-November 2015

COOPERATIVE EXTENSION ADMINISTRATIVE COMMITTEE (CEAC'S) RESEARCH QUESTIONS: RQ CAMPUS RELATIONS SURVEY: WHAT ARE THE THREE MOST IMPORTANT CRITERIA WE SHOULD CONSIDER WHEN EVALUATING COOPERATIVE EXTENSION'S RELATIONSHIPS WITH UW SYSTEM CAMPUSES? RQ ADMINISTRATIVE STRUCTURE SURVEY: WHAT ARE THE THREE MOST IMPORTANT CRITERIA WE SHOULD CONSIDER WHEN EVALUATING OUR ADMINISTRATION MODELS?

WHAT ARE THE THREE MOST IMPORTANT CRITERIA WE SHOULD CONSIDER WHEN EVALUATING COOPERATIVE EXTENSION'S RELATIONSHIPS WITH UW SYSTEM CAMPUSES?

The data strongly suggests one single central criterion: Insularity concerning Campus Relationships. Based on the data in the study, I define insularity as an overall institutional notion of disconnectedness. Insularity is (1) a consequence of different forms and degrees of distance between campus colleagues and county colleagues, and (2) a consequence of different forms and degrees of distance between campus structures and county structures.

CRITERION 1: Institutional Insularity should be accepted and embraced as our core challenge – and as the challenge that provides the very justification of the institution's existence.

CRITERION 2: Collaborative & Connective Insularity should be challenged by consciously designing Extension as connective space, and as a space of its own right – this is especially crucial concerning systemic pressures from other institutional systems.

Appendix A (cont'd)

CRITERION 3: External institutional pressures should be taken into account when creating a work environment and career opportunities that act as hard counters to institutional pulls from counties and academia.

WHAT ARE THE THREE MOST IMPORTANT CRITERIA WE SHOULD CONSIDER WHEN EVALUATING OUR ADMINISTRATION MODELS?

In terms of our Administrative Structure, the following two criteria – which are basically challenges – should guide decision-making around our administrative structure:

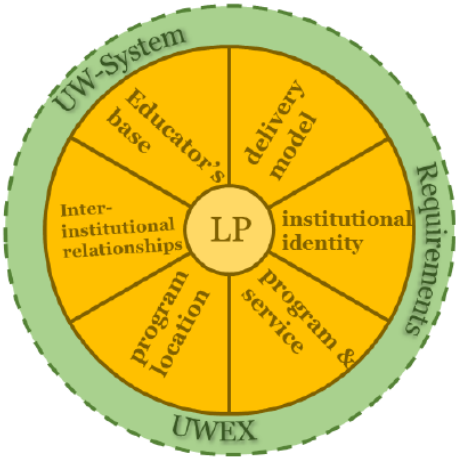
CRITERION 1: We should acknowledge an inconsistent perception & conflation of what Administration is, and what support/service is.

CRITERION 2: Administration may be seen as a superfluous 'other' by colleagues.

Research-Based Model 1: Local Presence

Our analyses showed that there are different ways to see 'local presence'. Different individuals may think of different aspects of local presence, or of different combinations of aspects. Our model so far consists of six aspects of local presence; this is not to say that there are *only* six; but these are the ones that we reconstructed from our colleagues' and our county partners' responses.

ASPECTS OF LOCAL PRESENCE



1. **Institutional Identity.** Our colleagues have a strong belief in the *Wisconsin Idea*, and in

our *Purpose, Vision & Values*. From the internal survey we learned that creating and maintaining local presence is central for our colleagues' self-understanding as educators. We see the Institutional Identity in both datasets as one aspect connected to local presence.

2. **Program & Service.** From the external survey we learned that our partners see our local presence through our program & services – for example by providing educational programs in nutrition, youth leadership, or parenting. We see the Program & Service in both datasets as one aspect connected to local presence.

Appendix A (cont'd)

3. **Program Location.** Local Presence is also defined by where it happens, or where it is accessed. A farmer who can access online resources while in the milking parlor, or a farmer who is participating in a pasture walk with a specialist can both perceive our institution as locally present. We see the program location in both datasets as one aspect connected to local presence.

4. **Interinstitutional Relationships**. These are our partnerships, our collaborations. They may include an educator working with a county department, an educator working with a campus demographics specialist, a specialist supporting a county in applying for a federal grant, or an educator working with a county department or local governmental entity. We see the Interinstitutional Relationships in both datasets as one aspect connected to local presence.

5. **Educator's base.** Local presence can also be defined by where the educator does their planning time. It is basically about where you would contact the educator. This could be the county seat, a department at UW-Madison, a campus-based center, or the Extension Building in Madison. We see the Educator's base in both datasets as one aspect connected to local presence.

6. **Delivery Model.** Local Presence can also be defined by the way in which we deliver our program and services – for example through an online webinar; a post on Facebook; by meeting someone at the front counter; when an educator presents at a county board meeting; the many ways a consumer/client may access our educational service. We see the Delivery Model in both datasets as one aspect connected to local presence.

GOVERNING FRAME OF LOCAL PRESENCE

Local Presence, as created, shaped, and maintained by an institution such as UW-Extension, cannot be thought without an *institutional governing frame*. In the context of our model, we call this the Environment of Local Presence. It consists, for example (and not limited to):

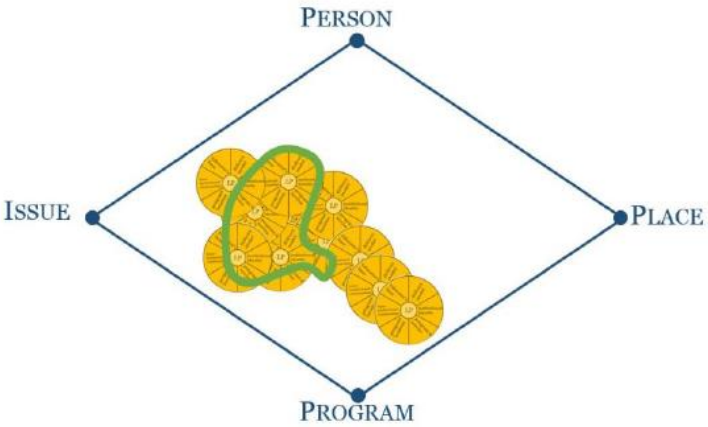
Requirements: Mandates, such as the response to budget cuts; reporting to stakeholders and other institutions.

UW-Extension: Our physical and intellectual structure: our four regions; our program areas; our *Educational Priorities*; our *Purpose, Vision & Values*; this includes also structural elements of county partnerships, and federal relationships.

UW-System: Our physical and intellectual superstructure: The *Wisconsin Idea*; the fact that there are Colleges & Universities.

Appendix A (cont'd)

DEFINING THE FRAME FOR LOCAL PRESENCES



In an ideal situation, local presence emerges where place, issue/opportunity, people and relationships, and program intersect. These intersections may occur in different places on the grid – similar to the way visualized in the graphics on the left, showing overlapping local presences. Each of them is located in a different position on the grid; it features different combinations and incarnations of actors, issues, places, and programs. The green line is the governing environment of some of the local presences; also note how this governing environment fully captures some incarnations of local presence, while partially or fully excluding others.

The challenge for any institution supporting local presences is to design a governmental environment that supports different local presences. Ultimately, we see this as a question of design: The organizational challenge lies in assessing, and determining which incarnations of local presences sit shall support. From an institutional view, the challenge lies in creating a frame for a multiplicity of local presences, and in an awareness of the limits of possible and/or desired support for certain local presences.

Research-Based Model 2: The Extension Space

Insularity, as reconstructed through the analysis of the data, is a consequence of personal distance, geographical distance, conceptual distance, intra-institutional distance, and extra-institutional distance.

- **Personal Distance:** Many colleagues have little or no experience with, or in Campus Relationships.

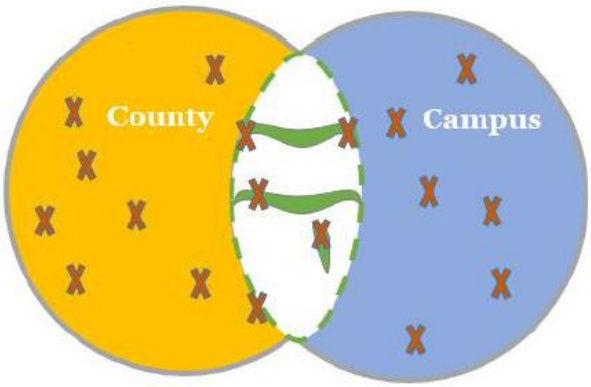
- **Geographic Distance:** Colleagues perceive Campus Relationships as limited to the Madison campus.

- **Conceptual Distance:** Some colleagues believe that other colleagues are not interested in how they go along with their work. For example, a county colleague may hold this perception of a campus-based colleague or specialist, and vice versa. In addition, some colleagues also doubt to varying degrees whether campus or county colleagues are useful or relevant. A county-based colleague may think this of a campus-based colleague, and vice-versa.

Appendix A (cont'd)

- **Intra-Institutional Distance:** The factors of distance listed so far accumulate in an overall Intra-Institutional distance: For example, a county colleague may think that the work they do in the counties constitutes the essence of UW-Extension. At the same time, a campus-based colleague may think the same of their work. .The effect of this seems to be an overall "othering" of colleagues. This connects with the administration survey: Here, administration is also partly seen as the "other", as a non-central part of the institution.

- **Extra-Institutional Distance:** From the first all-colleagues survey we learned that one major strain on colleagues was that they felt like a "Jack of all trades" – for example because they have to answer to many entities, and are facing constraints and demands from several institutions (e.g. Extension & Campus, or Extension & County). This most recent survey underlines this notion, specifically concerning pressures within the academic workplace of integrated specialists. We hypothesize at this point that pressures from respective workplaces – be they in a county or on a campus – could be strong factors that create and catalyze the conceptual distance described so far.



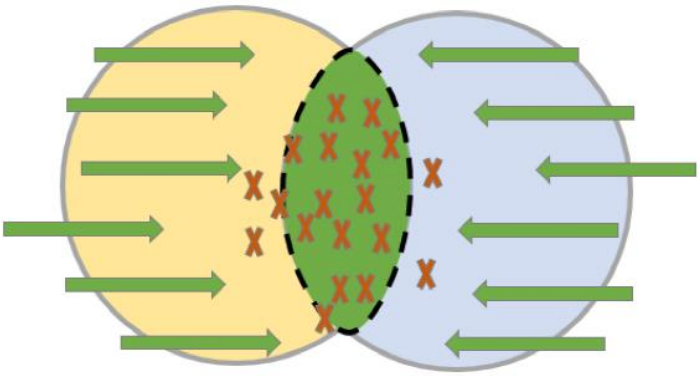
The consequence of the distances discussed above is an insularity of Campus Relations, as illustrated in the image on the left. The distance between colleagues is illustrated by the different "x" symbols scattered across domains. Campus relations seem to not be something everyone in Extension is actively, or commonly engaged in. Many colleagues are, in some way or form, distant from one another, being embedded in parts of their domains where they do not, or cannot create relations. Relations are visualized by the green connections in the center of the illustration. Campus relations seem to be a thin web of connections and connective experiences (and indeed these individual connections may be very strong and impactful, as this study also shows). However, a growing conceptual distance between campus-based colleagues, county colleagues and the administrative parts of the institution may be both a reason and a product of these connections remaining on an insular level.

According to our institution's Purpose, Vision & Values, Campus Relations are central to our mission: "We teach, learn, lead and serve, connecting people with the University of Wisconsin, and engaging with them in transforming lives and communities." In light of the Wisconsin Idea, Campus Relations seem to be the very reason for the existence of the institution.

Appendix A (cont'd)

THE EXTENSION SPACE

Analysis so far suggests that one major task within the restructuring efforts is to build UW-Extension as a strong connective space of its own right. Rather than Extension being an "add-on" or "extra thing to do" for both county and campus colleagues, leadership should contemplate how to design the institution in a way that establishes the connection between the University and the People of Wisconsin as a central element of the work pursued by all colleagues.



Creating a strong Extension Space – as illustrated in the diagram above - may mean to engage in intersecting & synergizing campus, county, and administration domains; it may mean to engage in a common frame of programming, outreach, leadership and support that provides and fosters common values, collegial interactions & nimble collaborations; it may mean to provide intellectual and structural leadership to those engaging in the space. This space should not be thought of as a physical space – rather, it is a common set of collaborative practices that are aiming at connecting the university with the people of Wisconsin, and vice versa. In this context it seems to be a major task for leadership to create a work environment and career opportunities that act as hard counters to institutional pulls from counties and academia.

'OTHERING' AS CORE CHALLENGE – BOTH INTERNALLY & PUBLICLY

Based on the findings of both the Administrative Structure & Campus Relations surveys, it seems that each part of the institution (campus, counties, administration) is seeing other parts as separate entities – while the entity one locates oneself in may be seen as the 'real' extension, with the others being sometimes closer, but mostly more distant from the 'real extension' – i.e. from oneself. This may even happen to an extent in which 'other' parts of the institution are seen as superfluous, or even as being in active opposition to 'Extension'.

On a larger scale, this begs the question of consequence not only for our internal, but also for our external perception. If individuals in different positions and locations (administration, campus, counties) tend to see themselves as the 'real' extension, but others not, then this may explain some of the issues concerning public perception the institution is facing. The construction of the 'others' as not 'really' being Extension may also be a co-construction within the environment colleagues operate in (for example when administrators are in contact with administrators from other institutions; when county educators are in contact with county office colleagues and external partners; when campus colleagues are in contact with

academic colleagues and academic institutions). Given this possibility, I believe that it is crucial that any effort concerning public relations and marketing is based on a thorough, research-based examination of these possible dynamics.

The larger internal implication of othering seems to concern all parts of the institution. Constant 'othering' of diffuse 'others' may result in structural tendencies of scapegoating of the systemic parts of the institutions: Campus Colleagues blaming 'Administration' and 'Counties' (whatever those may be); County Colleagues blaming 'Administration' and 'Campuses' (whatever those may be); Administration Colleagues blaming 'Counties' and 'Campuses' Colleagues. This connects with the remarks I have made above on implications for external perception of the institution.

So far, I have written as if there were a difference between 'counties', 'campus', and 'administration'. Using these categories reproduces the very issue I am trying to hint at. 'Othering' of some diffuse notion of 'administration' may shroud the fact that administration may be a collective act.

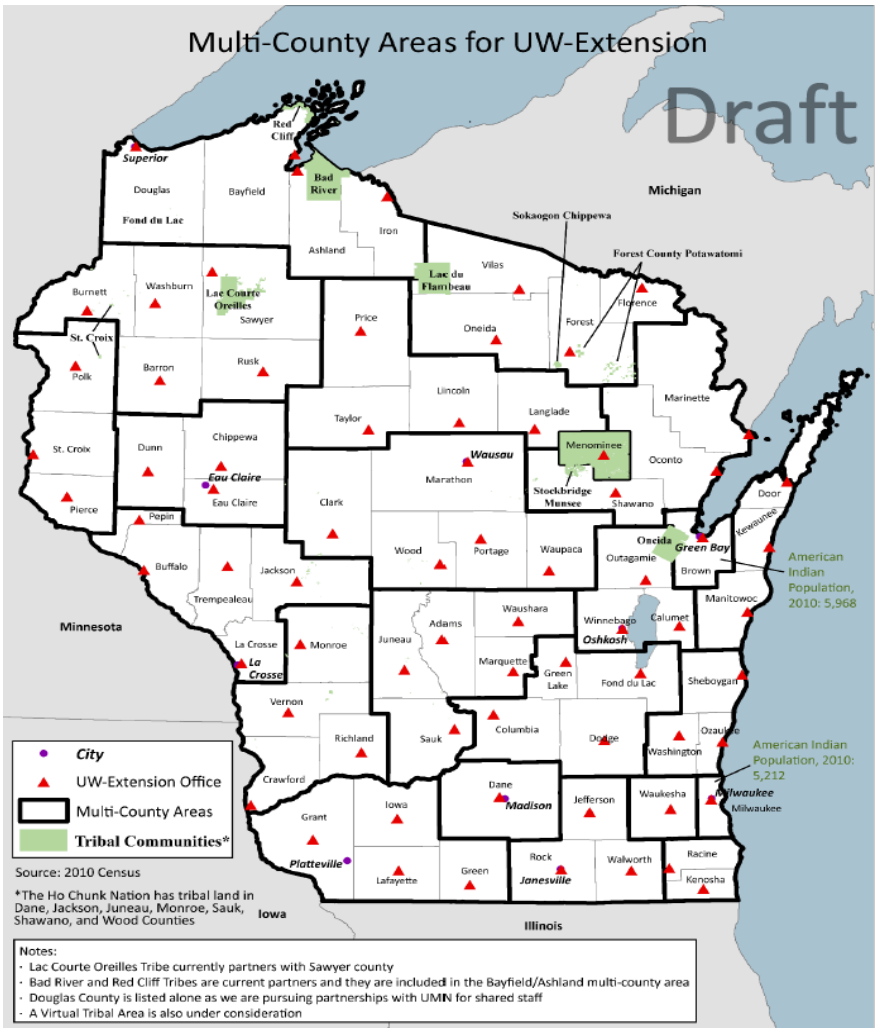
'Othering' shrouds the fact that – as Extension – we are a connective space; it produces a glare that results in not seeing how much of a connective space the institution is. I see this reflected in the incredibly rich configuration of 'local presence'; I see this reflected in the strength that values such as the Campus Relations and the Local Presence have in this institution. The challenge ahead, and the opportunity in the restructuring effort seems to lie in establishing a *strong, a conscious* Extension Space. This can, and should be guided by leaders. But most of all, this is not a creation out of thin air. This process can, and should build on the foundation of the values that seem embedded in this institution; this process could be seen less as a process of creation, and more as a process of gaining self-consciousness; as a metacognitive and reflective process that includes and embraces all colleagues – and in extension all institutions and individuals we connect and reach through our work, and due to our mission.

Appendix B

Recommended Multi-County Areas
Local-county-tribal presence component:

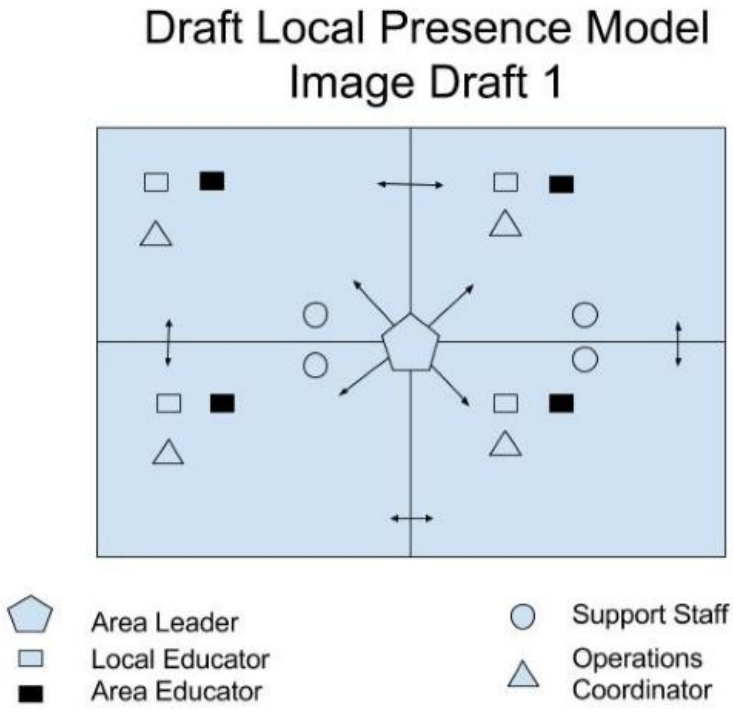
The following were considered to construct the recommended multi-county area boundaries:

- Road and transportation convenience (including public transportation)
- On-going joint programming
- Natural landscapes (water ways, valleys, etc)
- Commerce centers
- Reasonable access for all residents (calculate how far participants may need to travel for programs)
- Location of current county offices
- Other regional entities (regional planning commissions, farm bureaus, school districts, CESAs)
- Economic drivers (manufacturing, tourism, industry, farming)
- Historical alliances or animosities
- Similarity of needs (demographic characteristics, culture)
- Potential program partnres, including tribal partners



Appendix C

Draft Local Presence Model

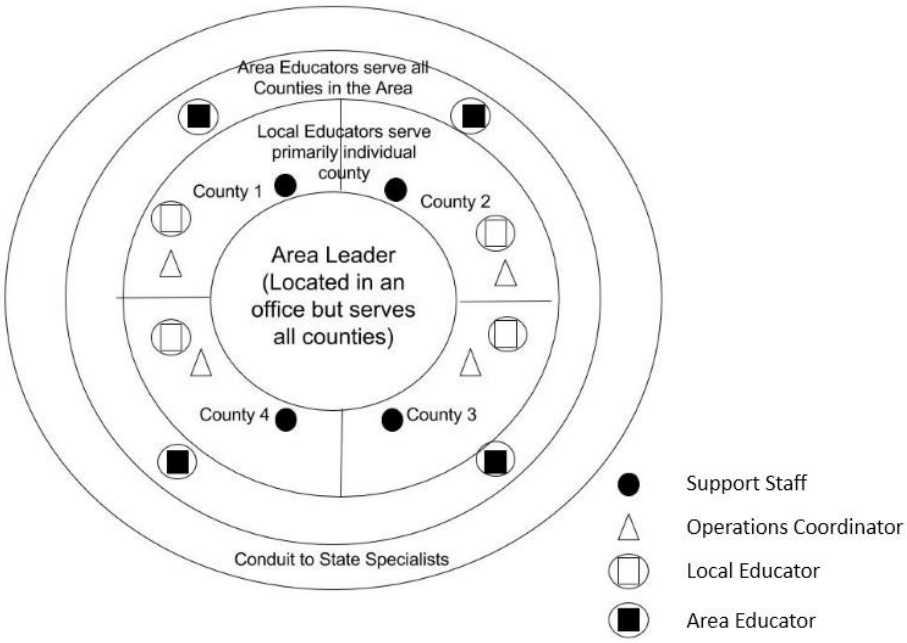


Please note: In the above image, each quadrant represents a county.

Appendix D

Draft Local Presence Model Image Draft 2

Includes connection with specialists



Appendix E

DRAFT Characteristics of Positions in the Multi-County Local/County/Tribal Presence Component Base Package

Area Leader

Purpose/Role: Primary administrator with program and functional oversight for a designated two to five county area. Designation of Area Leaders allows positions with an education purpose to focus on program and strengthens comprehensive coverage at the local level for institutional administrative responsibilities & accountabilities. Provides opportunities for interested colleagues to focus on administrative work. Provides career progression for current colleagues.

Responsibilities: Duties include developing and maintaining county relationships within a designated area, as well as external partnerships, hiring, performance management, budget management, needs assessments and managing the area advisory group. Includes management and supervision of resources (program, human, fiscal, facilities, etc.), external relations and partnership development. Area Leaders serve on teams, committees, advisory groups, et.al. in service to the institution, i.e., "organizational citizenship".

Proposed Draft Funding: "Base package" position. 100% State funding because of the administrative tasks.

Other components of the position captured in our Summit meeting:

- Will serve as a team builder
- Will ensure a "tight architecture" of all positions employed within a multi-county Area (including those funded via non-GPR sources, e.g., WNEP; Natural Resource Educators)
- Negotiates priorities among the counties with the Area Advisory Team
- Determines and coordinates resources to accomplish opportunities for interdisciplinary work
- Looks across all the resources available through the University to ensure identified programming needs are met, including resources available through campus-based specialists and administrative or program support units

Appendix E (cont'd)

Regional/Statewide Specialist

Purpose/Role: Primarily development and evaluation of interdisciplinary educational programs in response to local/county/tribal, area, regional, state and federal needs and mandates. Serves in a bridging capacity to increase connectivity between those who program at a local level and those at a regional and state level. Provides program support to those who program at local and area levels. Likely includes grant writing and grant management. May include program delivery. Provides opportunities for existing colleagues to focus on content expertise. Provides career progression.

Responsibilities: Teaching, interdisciplinary program planning, product development, program delivery, evaluation, write and secure grants to create new knowledge, serve as a liaison/resource for others with programming responsibilities in an interdisciplinary fashion; collaborating with those involved in research in emerging content areas. Specialists serve on teams, committees, advisory groups, et.al. in service to the institution, i.e., "organizational citizenship".

Proposed Draft Funding: 80 to 100% by the state; could be co-funded with county, campus or interest/commodity groups. Position could be housed within a county as a home office location.

Educators (local/county/tribal-focus or Area-focus)

Purpose/Role: Delivery and evaluation of interdisciplinary educational programs in response to local/county/tribal, area, regional, and/or state needs; Depending on position, may include development duties, i.e., program, grant; Provides career progression and opportunity to focus on programming interests/passions.

Responsibilities: Teaching, interdisciplinary program planning, product development, program delivery, evaluation. Educators serve on teams, committees, advisory groups, et.al. in service to the institution, i.e., "organizational citizenship". Program focus of position, and whether the position has a local/county/tribal or Area focus determined through an educational planning process. % of related job duties illustrated below (draft):

Appendix E (cont'd)

Educator (Area-focus)

- 20% Relationship-building and partnership development
- 60% Education at the Multi-county Area level
- 20% Interdisciplinary work with state specialists, serving on teams, development of programming, reporting

Educator (Local/County/Tribal-focus)

- 20% Relationship-building and partnership development
- 60% Education at the Local/County/Tribal level
- 20% Interdisciplinary work with state specialists, serving on teams, development of programming, reporting

Proposed Draft Funding: "Base package" position/ 2 per county. Positions will likely be funded on a 60% State/40% County split. Additional Educator positions above and beyond the "base package" will be funded by a higher level of County contribution.

Program/Operations Resource Coordinator

Purpose/Role: Support program planning and delivery at local/county/tribal level. Provide the local "face and place" of Extension within a county. Provide access to Extension as a career (for new hires).

Responsibilities: Serve as a connector between Extension clients/customers/users and resources on a day to day basis. Coordinate program-related logistics for all programming within a county. Volunteer training and support.

Proposed Draft Funding: "Base package" position; 80% (or more) county funded.

Administrative Assistant

Purpose/Role: Provide administrative support at local/county/tribal level and to the Area Leader in a manner aligned with the Cooperative Extension culture and operating principles. Provide the local "face and place" of Extension. Provide access to Extension as a career (for new hires).

Appendix E (cont'd)

Responsibilities: Answer phones, refer customers to Extension resources, produce materials, arrange meetings, provide technology support.

Proposed Draft Funding: 100% by the county for short-term; transition to UW-Extension funded employees over time.

OTHER POSITIONS/ACTIVITIES INTERACTING WITH POSITIONS AT THE LOCAL/COUNTY/ TRIBAL LEVEL:

Regional Directors will coordinate Area activities within a region. They also will work directly with program directors on Area and regional programming and personnel issues. Regional directors will be responsible for civil rights review and documentation, signatory, political issues management and human resource development linkage between counties, areas and the State.

Campus activities and investments will focus on developing basic and applied research foundations for Cooperative Extension's educational programming, curriculum development, training graduate and undergraduate students, and direct programming to relevant audiences.

Program Specialists will be closely connected to Program Area Offices and collaborate with Area and local/county/tribal-based educators on educational programming and research.

Campus-based specialists will be active members of their campus and department host institutions. State roles of campus-based specialists focus on providing statewide leadership, programming priorities, program support, developing interdisciplinary educational programming, political effectiveness and relationships, professional development, technology, publishing, distance education, marketing and communications, developing, interpreting and enforcing policies, campus and federal relationships. State level positions will coordinate activities across the state while interacting and partnering on regional and national issues of importance to Cooperative Extension.

Technology Assistant – Possible position with focus on expanding the use of technology in appropriate areas of program delivery, educational product development and administration.

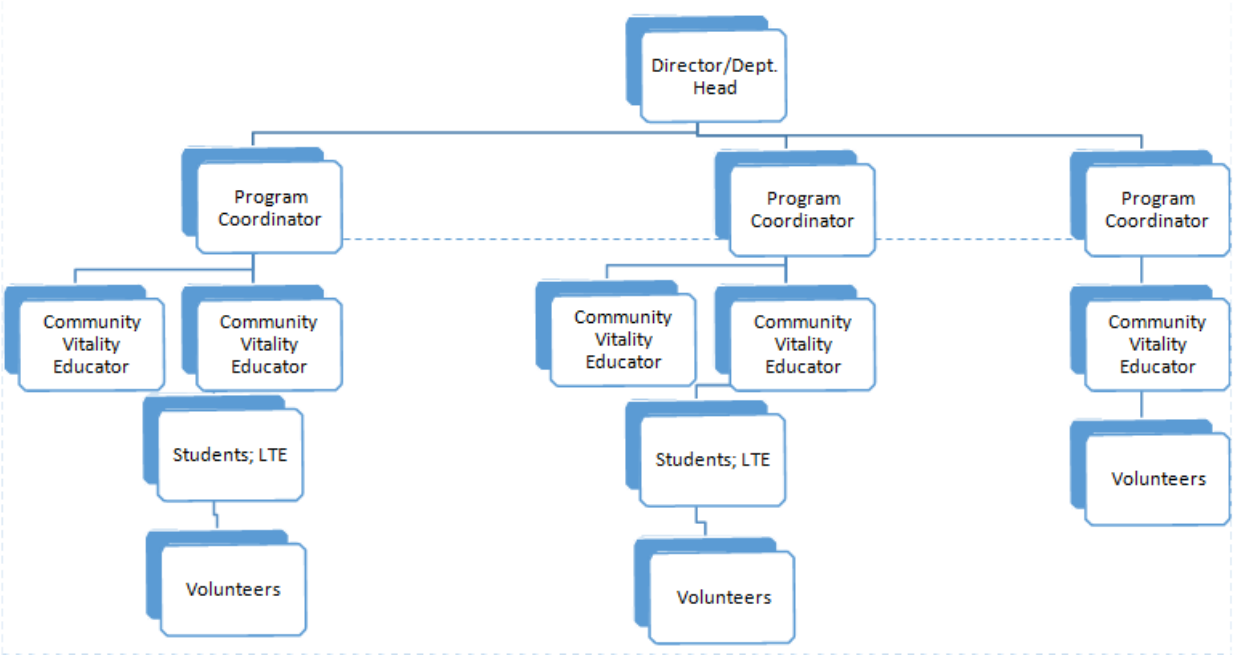
Appendix E (cont'd)

Metro/Urban Single County Staffing Model

Metro/urban counties have complex environments with large populations that translate into the state's largest percentage of racial/ethnic diversity; socio-economic diversity and more complicated local government structures with elected county executives.

Shared leadership is an element of metro/urban county Extension offices. Program Coordinators provide input into office decisions whenever possible and appropriate. Having the opportunity of colleagues to have a say and to be heard by the Director is a fundamental part of shared leadership.

In an effort to maximize resources and program impacts the following staffing model is proposed:



Appendix E (cont'd)

Program Coordinator* – assume the "lead" role for program development; scholarship/discovery; evaluation; impact reporting; and resource development. Program Coordinators develop the relationships with community partners and seek external funding when appropriate. Program Coordinators develop the "umbrella" program plan and supervise community educators; students and temporary employees. Program Coordinators represent different program emphases and can be faculty or academic staff. Program emphasis will be determined by county needs/issues and funding.

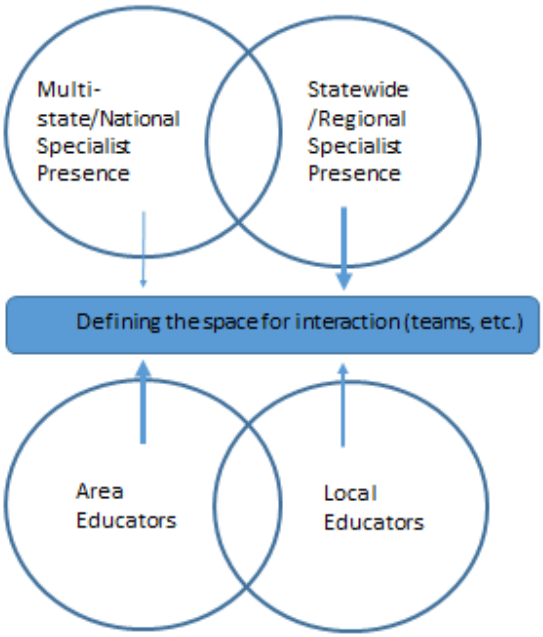
Community Vitality Educator* – work directly in the community as community educators. Educators could be project specific and funded in a variety of ways (state, county, grant, contracts). Educators can be academic staff or ad hoc.

Students; Temporary Employees* – work directly with the community educators on specific projects for varying lengths of time.

* Number will be determined by county needs/issues and funding.

Appendix F

Cooperative Extension Staff Interaction Model



Recommendations

- Within the space we need a conduit for interaction that is intentionally built and incentivized within the revised model – PDs, accountability, etc.

- The Area Leader should be part of the programmatic and institutional support for this

- Extramurally funded positions provide value added resources that might not fit tightly but represent important leveraging

Appendix G
Administrative and Educational Program Support Memo

November 24, 2015

Dear Colleagues,

As I indicated during our Cooperative Extension Statewide Conference, campus/administrative support survey results indicated that many of you have questions about what actually constitutes administrative support and services. I'm hoping to **begin** to answer that question with this email.

Unlike many organizations where the administrative budget includes only the salaries of key administrators, our administrative services – designed to support the work of our colleagues - encompass support units, program support functions, professional development and leadership support.

Cooperative Extension provides $8,383,772 in administrative support units, staff and non-personnel investments in professional development as of July 2015. This represents an investment of about 10% on our total budget of $82,542,506. These funds support the $14,240,036 invested in our local/county/tribal presence, $13,555,359 in our campus investment, $6,960,536 in our UW-Extension program investment which includes center-based and program area Extension specialists, with the remaining $39,402,767 split half and half between the total county support and grants/fees in support of programming.

Support units include program area and regional offices; budget and fiscal operations; human resource development; program development and evaluation; publishing; distance education and digital media; tech services; marketing and communications; and the Dean's office.

Program support functions funded to support our local/county/tribal presence and campus investment include shared governance, mentoring, professional development funds, performance support, conference planning, program development, recognition and awards, peer support, technology support, hiring, communications support, grants management and many more.

Leadership support comes in the form of supporting salary increases for those providing leadership by serving as county department heads, program area liaisons, and support for teams such as the civil rights team.

As we move forward to identify savings in the area of administrative support, we will be conducting an inventory of services so we can align services to support the local/county/tribal component and campus component of our nEXT Generation Model. We will have more information about the campus component and the administrative support component in the coming weeks.

Rick