Strategic Planning White Paper
Extension and Engagement in the College of Agriculture

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Introduction

The Extension/Engagement Working Group was charged with identifying the key drivers of change (both external and internal) that affect the extension and engagement mission areas of the College of Agriculture, and developing Goals and Strategies for the mission area. The Working Group met seven times, either by web conference (Adobe Connect) or face to face, and received input from the broader Purdue community through four comment sessions to which all Purdue Extension staff and faculty were invited. At each comment session specific drivers of change and related challenges and opportunities were addressed.

- November 11 (Web conference): Funding our Programs, Enhancing and Extending Education through Technology
- November 12 (Web conference): Multidisciplinary Solutions, Meaningful Partnerships, Demonstrating Impact
- November 17 (Pfendler Auditorium): Balancing Expectations of Faculty Specialists

Input received was incorporated into the drivers, opportunities, challenges, or strategies. Out of this process, four major goals were identified, which are described in more detail on pages 8-9. The four goals are:

1. Focus Extension programmatic efforts on high-priority issues important to the residents of Indiana
2. Provide science-based information and transformational education that enhance the capacity of Indiana residents and communities to make informed decisions, solve problems, and successfully face challenges
3. Reach a broader segment of Indiana residents on high-priority issues, through increased diversity in staff, volunteers, programming, and delivery methods
4. Create a culture of engagement inclusive of all faculty.

In this document, the drivers of change, opportunities, and challenges that led to the development of these goals are first described, followed by the goals, strategies, and metrics.
Drivers, Opportunities and Challenges

Nine drivers of change in Extension and Engagement programs were identified, and for each driver, opportunities resulting from the driver are identified, and challenges that will be faced in addressing the opportunities are described. These drivers form the basis of the Goals and Strategies listed in the next section.

1. Serving a Changing Clientele

Driver of Change
Changing Indiana demographics associated with trends such as an aging population, increased immigration and changes in the ethnic make-up, and generational differences all put new demands on society. The trend towards fewer farms and farmers, and business consolidation also lead to changes in Purdue Extension clientele. Clientele needs, and the most effective ways to serve them, are changing.

Opportunities
The demographic changes affect other organizations and agencies in addition to Purdue Extension. As we all find new ways to do business in order to meet the needs of new clientele, there is the potential to partner with different agencies, organizations, businesses and even individuals. As we extend our partnerships the possibilities for increased grant funding may also increase which could provide additional resources. As Baby Boomers retire there is potential to tap them to volunteer and share their wealth of knowledge and skills. This same group has shown an increased interest in health and wellness which are issues that Extension can address. At the other end of the age spectrum, Extension has many resources for youth that help them make good choices and enrich children’s lives. Finally, as clientele population becomes more diverse, so should our Extension staff diversity increase. A staff that is culturally broad will, more quickly, find inroads for work with diverse groups.

Challenges
We are steeped in tradition and in traditional programs. Some find these hard to leave. Reaching youth and diverse groups is increasingly difficult given our traditional methods. Currently staffing needs center around traditional Extension programming, and we may need to consider alternate job descriptions and staff contracts that are more flexible and/or tied to nontraditional areas. Meanwhile university policies and procedures make changes in hiring very slow. Extension is venturing out of areas where we are comfortable, into areas where we may not have all the answers. We may come under scrutiny when we identify a group that needs our services. Traditional groups may feel we should not service some clientele or fear we will leave them behind. This can affect the local Extension office in funding as well as in support for community programming. Prioritization of programs and research is difficult, especially with limited staff.

2. Funding Our Programs

Driver of Change
Expertise in a wide range of disciplines is required by extension specialists and educators in order to address the diverse issues and needs of our stakeholders. Resources have become more limited at both the campus and county levels resulting in fewer specialists on campus and fewer
educators in counties. Funding from federal, state, and local sources have all been impacted. Some counties have two educators, many have responsibilities in two counties, and some are employed on a part-time basis. Campus extension specialists on academic year appointments may not have summer salary supplements and consequently may not develop or deliver extension programs in the summer months. Some departments have fewer specialists who have major extension appointments and this is changing the culture in departments in regards to mentoring of junior faculty. Other demands on specialists with minor extension appointments limit the level of extension programming, especially in the summer months. In some cases, fewer extension specialist and educator FTEs have resulted in expertise in fewer discipline areas.

Opportunities
As resources become more limited, Purdue Extension must be more creative in staffing and programming so that stakeholder needs are met effectively. One opportunity is grants that require integrated extension and research (and teaching) projects. This offers funding for the development of new extension programs. Integrated extension and research funding can allow Purdue to deliver new research findings to stakeholders, while using existing funding for maintaining other relevant programs. There may also be opportunities for identification of new funding sources through entrepreneurship by specialists and educators. Tighter overall funding also provides limited opportunities to sunset programs that have less demand or that have minimal impact. Partnerships within Purdue and across institutions will also allow some increased efficiency in terms of delivering extension programs that require expertise across disciplines.

Challenges
Although new sources of funding may be available as granting agencies earmark funding for integrated projects, such funding may drive us to develop and deliver programs that do not completely mesh with the specific goals and needs of some counties and their stakeholders. Increased entrepreneurship by county Educators has the potential to affect the ability to respond to local needs, or specialize in prioritized areas. In addition, many extramurally-funded projects provide funds to develop new programs, but not necessarily maintain these programs. Therefore, Purdue Extension will need to work with stakeholders to develop funding mechanisms to maintain relevant programs, develop effective prioritization systems for determining which programs should be maintained and which should be terminated, and plan for how stakeholders can be served when Purdue cannot serve them.

3. Enhancing and Extending Education through Technology

Driver of Change
Clientele seek flexible access to information from a variety of sources at the time they need it. Immediate responses are expected. Web-based video and audio are accessible to many of our clientele, allowing online presentation to become more common. Interactive technologies, often called Web 2.0, promote collaboration and enhance information flow in many directions.

Opportunities
Extension can extend its educational reach while reducing transportation time and costs, through cutting-edge education methods using new technologies and approaches. Nationally, eXtension
provides support and educational programs on the utilization of new technology. Development of web sites that provide information that is both timely and easily accessible is a basic use of technology, but technology can also enable interactions with clientele in locations throughout the State (and beyond) in real time or asynchronously, through IP Video, web meetings, and other technologies that enable virtual meetings. A very forward-looking technology would be to provide virtual experiences through environments such as Second Life. Technology could also increase efficiencies, such as web-based registration using credit cards for Extension programming.

Challenges
Challenges to using new technologies to extend the reach of Extension include lack of access by some clientele or in some situations, lack of awareness by Extension staff of the possibilities that new technologies provide, and the need for training.

- **Access**: Technology is not available in all locations equally, and often not at the times people most need information. Many rural areas do not have access to broadband internet. During emergencies such as flooding, access to the internet may be limited.
- **Awareness**: Extension staff may not be aware of new technologies such as Web 2.0, wikis and blogs, or virtual experiences, and therefore have not yet thought through how they could be used in Extension programming.
- **Training**: Most Extension staff are not equipped or trained to effectively use new technologies. To broaden their use, resources will either need to be invested in staff training, or more specialized staff will need to be hired and available to provide the access needed to current technology. Expectations regarding the balance of acquisition of new knowledge and skills in subject matter and delivery mechanisms will need to be set and rewarded.

4. **Meaningful Partnerships**

*Driver of change*

There are other educational institutions and organizations today that may be competing with Purdue Extension, both for resources as well as clientele. This includes other universities, community colleges, non-profit entities, producer organizations, and government agencies that fund, subcontract, or deliver educational programs for youth and adults. In the area of youth programming, most organizations do not have the uniqueness (and advantage) of programs and opportunities generated from a research/scientific base.

*Opportunities*

Partnerships enhance the vision of Purdue Extension in meeting the objectives of stakeholders. Creating and sustaining partnerships avoids duplication of effort, enhances communication among stakeholders, and benefits all involved in engagement with Purdue Extension. The Extension system can bring to the table a rich resource base to which other organizations do not have access. The Indiana Conservation Partnership is one example of how organizations can jointly provide leadership to the state of Indiana. Extension faculty and staff have the ability to provide leadership and subject matter expertise to groups seeking or requiring certification programs. Within Purdue, partnerships may include the Industrial Extension Service, College of
Consumer and Family Science, College of Business, and other engaged departments and colleges.

Challenges
Individuals and organizations may have difficulty serving as partners in a way that is mutually beneficial. It is possible that organizational goals may not mesh and that a willingness to acknowledge each partner’s contribution is absent. Staff vacancies or changes and organizational mission realignment are an ongoing challenges to building and sustaining effective partnerships.

5. Multidisciplinary Solutions

Driver of change
Issues that need to be addressed are complex and interrelated. Experience has taught us that we can’t solve problems in a vacuum, but we need to consider the broader consequences. We need to be able to adapt to continuing change and our solutions must include social, economic, and environmental impacts.

Opportunities
Solving problems utilizing teams allows both timely research and efficient delivery of information to the clients. A multidisciplinary approach will better meet client needs and optimize resource allocation.

Challenges
Working in a multidisciplinary team takes time, dedication, openness to others’ ideas and perspectives, skilled leadership, and management of physical distance. Not all team members see the benefit of the collaboration.

6. Demonstrating Impact

Driver of change
The need to demonstrate our value to society and to Purdue is increasing, driven by funding cuts, accountability requirements, and the fewer traditional clientele who already know about Extension.

Opportunities
Purdue Extension has a proud tradition of transformational education that changes lives, and therefore the more people know about Extension and its impact the more positively they respond. Tools and techniques have been developed in various locations to evaluate and communicate impact, but many Extension staff may not be aware of cost-effective tools. Focusing our efforts on those for which we can provide enough programming to clearly demonstrate impact would increase our ability to define outcomes.

Challenges
It can be time-consuming and expensive to effectively evaluate and communicate impacts of programs. The long-term changes that Extension does well are particularly difficult to
document, and are not usually covered by the news media who prefer immediate events rather than long-term changes. Time spent evaluating and documenting impacts may take away from future programming. Extension staff are often reluctant to claim that programs resulted in significant change by someone or something without data and solid science-based evidence. We are reluctant to take undue credit when the impact may be uncertain or difficult to quantify.

7. **Science-Based Solutions for a Changing Environment**

*Driver of Change*

Addressing environmental impacts is no longer a specialized concern for only some extension staff, but rather an integral aspect of a healthy economy and quality of life in Indiana. Recent increases in the cost of energy are a reminder that resources are limited. Other environmental issues that are driving changes in our client’s lives relate to animal and manufacturing production; water quality, use and volume; invasive species; genetic modification; landfills; air quality; and biomass utilization.

*Opportunities*

Extension provides decision-making information to politicians, industry, and the general public. Regulation is one potential response to environmental concerns, which is often informed and improved through science-based information brought by Extension. Another response is the development of voluntary certification programs, in which standards are set and agencies or third parties verify that the standards are being met. Increased education opportunities or requirements, potentially with professional certification as a goal, may also be a response to environmental challenges. All of these are opportunities for Extension. Also, in response to new regulations and certification systems many potential solutions may be offered, and some may not prove beneficial. Extension can serve an important function by identifying and bringing all of the proposed technology together, on a level playing field, for consideration and discussion.

*Challenges*

Education in the context of regulations and certification systems presents many challenges. Complex problems and decisions require a systems approach, not just a specific recommendation. Science alone does not provide public policy solutions, and our commitment to unbiased information may be challenged.

8. **Global Linkages**

*Driver of Change*

Globalization affects Purdue Extension clientele, even in their local communities. The marketplace is global, and clientele expect us to assist them. Globalization provides opportunities but also increased expectations for faculty international activities. This is yet another pressure on faculty who face many competing pressures.

*Opportunities*

Purdue Extension can do programming related global technology, global issues, and marketing in a global economy. Extension can help clientele across Indiana to have a more global view,
even in their own community. Funding opportunities arise from working with private foundations interested in global issues that directly reflect our expertise. Purdue capacity can also benefit through wider linkages around the world.

Challenges
Funding opportunities from traditional sources are shrinking. Although Purdue has a long history of working in the global marketplace, so do many of our peer institutions who are competing for many of the same funds. Considerable challenges exist in taking care of Extension programming in Indiana, and at the same time expanding it nationally and internationally.

9. Balancing Expectations of Faculty Extension Specialists

Driver of Change:
Faculty extension specialists face many challenges in meeting the expectations of the university promotion and tenure process and also extension clientele needs. A robust, applied research program is needed to develop and evaluate technologies that may provide benefits to our citizens. However, flat or reduced support for technicians and extension activities and programs requires extension faculty to spend increasing amounts of time seeking competitive funding to support their applied research and extension activities. The overall reduction in faculty FTE has resulted in an increased demand on extension faculty to participate in classroom teaching on campus, creating challenges for faculty to excel in a primary appointment of extension since classroom teaching requires dedicated effort and student accessibility.

Opportunities:
• Decreasing the breadth of topics covered in extension programming would create opportunities for increased depth of understanding into specific issues, to develop collaborative relationships with other faculty and county extension educators, and document the impact of our extension programs.
• Developing incentives for inclusion of faculty with primarily research and teaching appointments in regional or county extension programs may enhance their understanding of the needs of the citizens of Indiana.
• An assessment tool with metrics and detailed examples on defining and characterizing extension impact could help faculty in demonstrating the effect of extension programming in the promotion and tenure process.
• Plans of work and self-assessments mindful of university and college priorities developed by each faculty specialist would help faculty internalize and clearly focus their program. Through this process they could benefit by decreasing the breadth of topics covered in extension programming, increasing the depth of understanding into specific issues, and increasing collaborative relationships with other faculty and county extension educators.
• Seed money to support new or high-priority issue areas would enable faculty to develop the applied research needed to effectively address needs.

Challenges:
Demand for science-based information on important topics often prevents decreasing the breadth of topics covered. Integrated research-extension proposals offer some opportunities for
funding, but require considerable time and effort by extension faculty to seek out collaborations, and may result in only a small amount of funds being received.

**Positioning Statement for Purdue Extension**

Serving Indiana and beyond, we provide information on current issues that is timely, trusted and tested, so that our clients can live better lives and improve their livelihoods. We draw on expertise from around the world and make it accessible to people in their hometown. We are proactive and practical, working with others to effectively and efficiently bring research-based information and resources to bear on issues. As life gets more complicated, we help people solve problems and make informed decisions every day.

**Goals and Strategies**

The Working Group proposes four goal, with relevant strategies to achieve each goal. Strategies are based on the drivers described above, which cut across goals. Therefore similar strategies may be under more than one goal.

**Goal 1: Focus Extension programmatic efforts on high-priority issues important to the residents of Indiana**

- a) Implement a deliberate process for identifying high-priority issues that are reviewed at least annually.
- b) Identify and allocate sufficient resources and program activities to demonstrate impact in high-priority areas.
- c) Seek out partners who bring additional expertise to address high-priority issues and may offer programming in complementary areas.
- d) Create a process for implementing, supporting, and recognizing issue-based multi-disciplinary and multi-state solutions.
- e) Communicate with key stakeholders the impact of our programs. Provide tools and training for cost-effective means of evaluating impact.

**Metrics for Goal 1:**
- Process in place for determining priority issues
- Resources allocated to those issues
- Partners involved in addressing those issues
- Number of issue-based teams and programs that they develop

**Goal 2: Provide science-based information and transformational education that enhance the capacity of Indiana residents and communities to make informed decisions, solve problems, and successfully face challenges**

- a) Deliver multi-disciplinary education in a variety of ways to meet audience needs.
b) Equip local communities for the global environment.

c) Use the diverse expertise of the university to assure a comprehensive approach to finding solutions, recommendations, and education on complex priority issues.

d) Increase marketing of our programs. This may include additional staff and/or tools, support, and training on more effective marketing.

e) Find new resources to support innovative extension programs. This includes entrepreneurship by Extension professionals and recruiting and developing volunteers to support and sustain programs.

f) Increase efficiency and customer convenience, for example by implementing e-commerce to accept credit card payments for programming.

Metrics for Goal 2:
- Number of programs or contacts
- Use of new methods or strategies in our programs
- Number of people outside of Extension contributing to programs (e.g., through issue-based action teams)
- Total extramural funds per Extension FTE (while maintaining quality programs)
- New methods implemented to increase efficiency (e.g., credit cards)
- Customer satisfaction with registration process (determined through program evaluation instruments)

Goal 3: Reach a broader segment of Indiana residents on high-priority issues, through increased diversity in staff, volunteers, programming, and delivery methods

a) Increase staff and volunteer diversity to include expertise with new audiences in order to address changing state demographics.

b) Prioritize issues and audiences so that Purdue Extension effectively reaches non-traditional audiences and those individuals most likely to benefit from our expertise.

c) Employ new technology when appropriate to educate and engage clientele. Equip Purdue Extension faculty and staff to utilize new technologies, through increased training opportunities and/or providing technical support personnel. Where appropriate, promote collaboration between organizations to share investment in technology.

d) Determine and utilize the most appropriate methods and technologies to reach various audiences, and develop a model for assisting with skill development in these areas.

Metrics for Goal 3:
- Staff diversity
- Prioritization methods
- Number of programs offered at a distance through technology
- Number of staff equipped to use new technology and select most appropriate method
- Variety of technologies available to be used
- Number of new audiences served

**Goal 4: Create a culture of engagement inclusive of all faculty members.**

a) Create promotional incentives that encourage all faculty members in the College of Agriculture to engage with the people of Indiana. This may include PK-12 education, Extension programs and other formal and non-formal education.

b) Clarify what engagement and Extension mean, in terms of promotion and accountability, and establish metrics of effective engagement. Create opportunities and rewards that recognize engagement/extension activities across the university.

c) Enhance and promote partnerships between specialists and educators, for example through issue-based action teams.

**Metrics for Goal 4**
- Number of faculty without Extension appointments who report engagement activities
- Number of teams or partnerships

**Peer Institutions**
- Ohio State University
- Iowa State University
- University of Illinois
- University of Minnesota
- Michigan State University
- Penn State University

**Key investment areas**

1. When teams are established to address multidisciplinary issues, allocate funding for the leadership and other functions of the team.
2. Develop a more diverse staff through investments in Extension assistantships and pilot projects that involve non-traditional audiences.
3. Develop future leaders for the Extension system through leadership development activities.
4. Develop a deliberate approach to vetting new technology and getting the most appropriate technologies into end user hands, with training to use it effectively.
5. Invest in marketing Extension programs and communicating impacts. This may include additional staff or training, tools, and templates for impact assessment.
6. Provide support for faculty on 10-month appointments to maintain key Extension programs.