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Finding First-Year Success in Extension: Navigating Stakeholder Needs and Institutional Expectations

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Functioning within a defined administrative framework and meeting the needs of the stakeholders are essential in an Extension appointment. The first day of employment starts the promotion and tenure clock. It is the responsibility of the new Extension professional to take immediate steps to move forward with development of programming and application of the skill set that they bring to the job. Finding success in the first year of an Extension appointment revolves around understanding the expectations of the institution and the needs of the stakeholders. Once the institutional expectations and programming needs are understood, formulating a strategy that includes plans of work and logic models, measurement of outcomes and impacts, team building, professional development, peer mentoring, grant writing, and scholarship will provide a foundation for first-year success in Extension. A willingness to follow a timely and systematic approach to meeting the expectations of the institution and stakeholders will provide for an efficient transition and relieve many of the stressors associated with a new appointment. This paper is based primarily on the author's first year experience as an Extension faculty member and summarizes several best practices.

Keywords: Extension, outcomes, impacts, logic model, programming, professional development

Introduction

Academic training provides most of the necessary skills to understand the science and communicate effectively. In addition, new tenure-track Extension faculty must have the ability to function within an administrative framework, and at the same time, meet the needs of the stakeholders. Whether new to or experienced in Extension, this can be a challenge.

In Extension, the term "faculty" can be defined in a variety of ways. In some institutions, Extension faculty are eligible for the promotion and tenure process. In others, promotion alone may be the goal. Depending on the institution or content area, applied research, in coordination with Extension programming, may be a priority. While the specific emphasis may vary

depending on the institution and the level of education, the purpose of this paper is to summarize some best practices applied through personal experience of the author to assist Extension professionals in navigating expectations early in the appointment.

Providing new Extension professionals support early in their careers is essential to assist in minimizing the stress and frustration that can become part of a new employment opportunity (Ritchie, 1996). A plan for progress in the promotion and tenure system is essential for the success of new Extension faculty (Saunders & Reese, 2011). While the examples in this paper focus on Livestock Extension, similar projects, expectations, and needs can be inferred to include other Extension specialties and content areas.

For many, preparation for work in various Extension specialties is limited to working with a graduate mentor involved in Extension activities or participating in Extension functions while working on advanced degrees. In addition, new Extension professionals at the Specialist level may have come into the Extension system via teaching and research appointments. Extension faculty members are chosen based on a skill set and the potential to elicit change as a result of programming within the discipline. Once the formal orientations and start-up briefings are complete, the fundamental concern of first-year Extension faculty should be to match that skill set with the multi-dimensional, and often conflicting, expectations.

Expectations

It is common that expectations for tenure-track Extension faculty will include both Extension programming and applied research. The additional applied research component can be especially important for Extension faculty to meet the seemingly ever-increasing requirement for scholarly activity. Meeting these expectations can be particularly challenging for some, especially county-based faculty, often due to the geographic remoteness from the physical and intellectual resources of the university. Six key components that have the potential to be evaluated in measuring the progress toward tenure of Extension Faculty are 1) Extension program planning; 2) Extension program delivery; 3) program outcomes and assessment; 4) team building and collaboration; 5) acquisition of extramural support; and 6) scholarship and creative products which include delivery of stakeholder-oriented information (fact sheets, newsletters, web-based delivery systems, popular press and social media) and peer-reviewed Extension scholarship, as well as peer-reviewed professional articles.

The systematic annual evaluation of each new Extension faculty member means that the first day of employment starts the promotion and tenure clock. Generally, demonstration of abilities within five or six years will determine if tenure will be successfully attained. The responsibility of meeting the criteria for promotion and tenure is squarely on the shoulders of the new Extension faculty member.

Identifying the Needs of the Stakeholders and the Institution

Needs assessments can be conducted utilizing a variety of methods (Etling, 1995). For example, during the first seven months of this author's service, a needs assessment was conducted and utilized key informant interview responses similar to those described by Caravella (2006). A varied array of producers, industry professionals, leaders of livestock associations and commodity groups, established research scientists, fellow Extension Educators and Specialists, and scientific collaborators were engaged in these meetings. Input related to developing effective Extension programming was compiled from face to face conversations, observations, and written and online resources. As a first step, an outline was developed to delineate key points of individual perceptions and to develop a vision for the future as a response to stakeholder input.

Stakeholders expect Extension personnel to anticipate and react to emerging issues related to the communities and industry in their region and want these issues to be addressed in a timely manner through Extension programming and applied research projects. They also require the message to be delivered in a relevant, understandable, and applicable manner. The institution's expectations will necessitate that Extension programming and applied research have the potential for impact and carry a defined and logical course of action with documentable outcomes.

Example of Developing a Plan of Work

In response to the needs assessment and structured around evaluation-based program planning, a three-point multiyear plan of work was developed for Extension programming. The plan of work provides a framework around which programming is built and serves as a launching point for development of a logic model. The plan of work contains the overarching subject matter of Extension programming. As an example, the author's plan of work included these components:

1. **Beef cow nutrition and reproduction**—Utilize effective nutrition and management to maximize the number of cows bred and healthy calves born per cow exposed to bulls during the breeding season. Implement strategies to reduce reproductive failure.
2. **Herd health and immunity**—Facilitate herd health and reduce losses from cow and calf diseases by effective herd management and health protocols.
3. **Reduction in production costs**—Stakeholders identified rising feed costs as a key barrier to beef production profitability and sustainability. Give the producers the knowledge to utilize lower-cost alternative forages, feeds, and supplements.

A focus on three or four key components will provide structure for endeavors. Around each of the broad three points, it is possible to plan Extension programming and applied research that not only bring education and empirically-based information to stakeholders, but also are structured in a way that inputs, activities, and outputs are clearly defined. In addition, measurement of

short-, medium-, and long-term impacts is facilitated. There must be an inexorable link between Extension programming and applied research. The plan of work document provides a roadmap for both activities. The finalized plan of work should include several important components: 1) planning year and duration of the project; 2) a title for each activity; 3) whether the activities are individual or collaborative (and to include names of collaborators); 4) institutional strategic goals that are being met; 5) the situation that the project addresses; 6) milestones and benchmarks; 7) how the project will be evaluated; 8) a list of outputs, scholarship, and educational materials; 9) delivery methods; 10) intended audience; and 11) the hours or days of required effort.

Learning the Logic Model and How to Measure Outcomes and Impacts

Based on a plan of work, a logic model can be developed to describe activities needed to carry out the work. Planning programming with evaluation in mind is part of the successful measurement of outcomes and impacts. Logic models provide a means to illustrate a systematic approach to planning and to delineate the path toward the desired outcomes (Millar, Simeone, & Carnevale, 2001). Measures of programming effectiveness are possible when logic models are used at the planning stage (McLaughlin & Jordan, 1999). Based on skills learned in professional development activities, it is possible to construct a logic model highlighting the inputs and projected outcomes of programming based on the University of Wisconsin model (Taylor-Powell & Henert, 2008). Figure 1 on the following page presents the logic model developed from the author's aforementioned plan of work.

In performance-based programming, measurement of short-, medium-, and long-term impacts will play a major role in determining the effectiveness of programming. Resources such as Successful Assessment Methods and Measurement in Evaluation (SAMMIE) provide information for skills in evaluation of programs (Archer, Bruns, & Heaney, 2007).

Peer Mentoring

Effective orientation and training followed by mentoring can benefit an organization by fostering employee satisfaction and reducing turnover, which can be instrumental in providing greater educational impact to clientele (Place & Bailey, 2006). Whether or not the institution provides a framework for mentoring new Extension faculty, engagement of an experienced group of tenured Extension Educators and Specialists to guide new Extension faculty through the rigors of the first year is invaluable. These peer mentors have the ability to assist in the navigation and serve as highly valuable advocates for new Extension faculty in the promotion and tenure process.

Figure 1. Logic Model

Program: <u>Extension Beef Cattle Programming for Washington State and the Pacific Northwest</u>

Situation: Beef cattle producers in Washington State face economic stresses manifested as narrowing margins as commodity (feed) prices rise. Coupling cost-saving feeding, health, and management practices of the cow herd will be instrumental in providing for the long-term sustainability and economic viability of beef operations in our region. Being able to react to emerging issues and provide Extension and applied research programs with measureable impact are the paramount goals of this program.
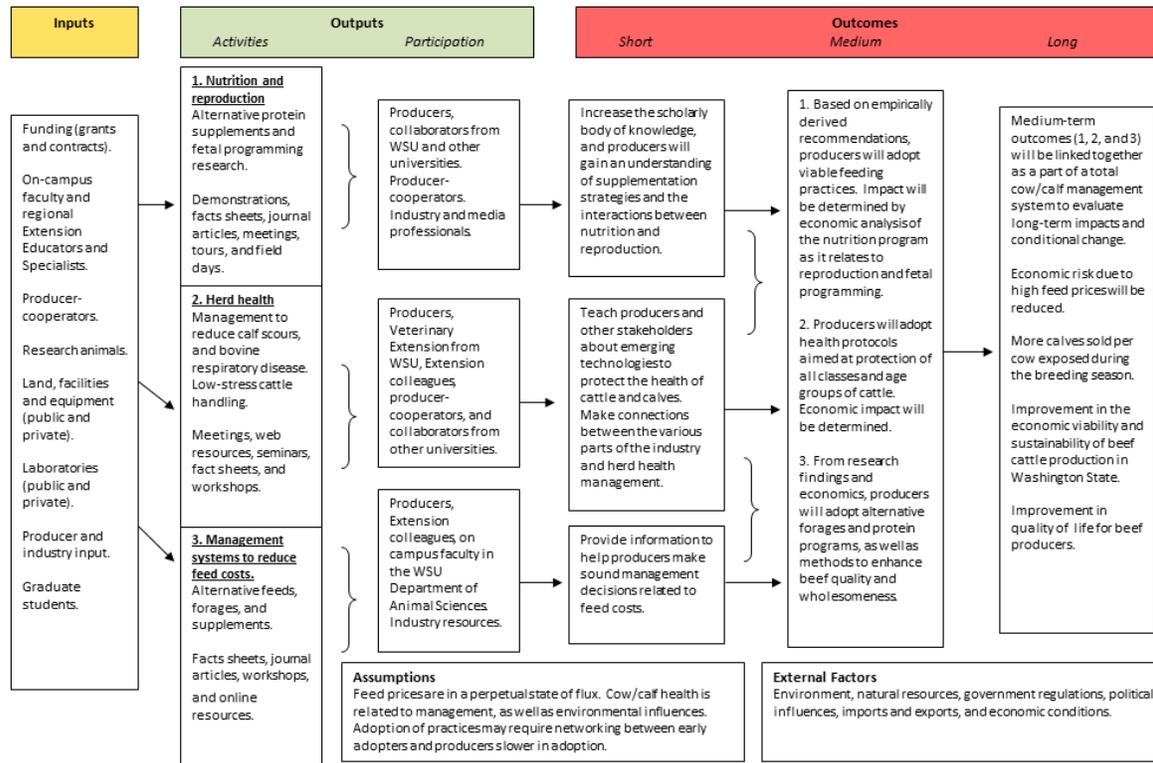
University of Wisconsin Extension Logic Model Worksheet available at http://www.uwex.edu/ces/pdande/evaluation/pdf/UW%20Coop%20Ext%20Logic%20Model_WorksheetTableformat.pdf

Identifying Potential Collaborators and Building Teams

Perhaps one of the most satisfying tasks of building an Extension program is the process of seeking and finding collaborators and building teams of like-minded people to fulfill the objectives associated with the plan of work. Bitsch and Thornsbury (2010) provided a detailed discussion of team building for integrated Extension programs. Success in the team setting is related to outcomes, impacts, and deliverables as well as indicators associated with team member behaviors and interactions (Kelbaugh & Earnest, 2008). Looking within, as well as beyond, one's own discipline will be critical in assembling teams that not only function effectively, but also provide for networking within and outside the institution. In particular, county-based faculty can benefit from including in teams members with access to facilities and laboratories not available in county Extension offices.

It is important to recognize the regional and global flavor of contemporary Extension work in selecting those individuals with which a professional relationship can be built. More than 60% of Extension professionals agree to an interest in including some global perspective to programming (Ludwig, 1999). This should be taken into account when forming teams.

Working with Extension professionals from other institutions brings fresh perspective, additional resources, and novelty to programming. Collaboration within the team structure provides a means to identify future cross-disciplinary opportunities for Extension and applied research and to find synergies that have the potential to result in future funded projects and multi-disciplinary scholarship. In total, if the team is functioning properly, team output will likely exceed the sum of the output generated by the individual participants had they been working independently.

Professional Development—Now! Not Later

Competency-based training has been implemented to promote learning and to facilitate organizational improvement (Stone, 1997). In some departments, a structured professional development system does not exist for Extension faculty. It is therefore incumbent upon the new Extension faculty member to seek out and develop his/her own plan for professional development. Implementing such a plan entails self-reflection and identifying those competency areas for which additional training will be useful. New Extension faculty should make a determined effort to utilize professional development to fill knowledge gaps early in the appointment. In a Florida study, the competencies of self-management, program development, communication skills, interpersonal skills, and technical and subject matter skills were among the most reported (Benge, Harder, & Carter, 2011). For most Extension Specialists, competencies in applied research and interpretation of research material are vital. An understanding of outcomes and impacts as well as grant writing is critical for all the specialists. The competencies gained through professional development at the outset of the Extension appointment will continue to be valuable throughout one's career.

Grant Writing and Sponsorships

Acquisition of extramural funding is of paramount importance to the first-year Extension professional. It is the support by which the plan of work, activities, and programming come to fruition. Given the premium placed on funding for applied research and Extension programming, grant writing is essential to early-career success and a responsibility that must be viewed as a priority. Philbrick (1990) noted that, in some cases, grant money may be the sole source of support for some programs. New Extension professionals also need to take into account the funding rate and lag time between the calls for proposals, writing of letters of intent and full proposals, and finally receipt of funding. Discernment in placing effort in pursuing funding with the greatest chance for success will be instrumental in effective time management.

At the outset of an Extension appointment, grant writing toward modest-sized projects with reasonable chances for funding success are most useful. The likelihood of large multidisciplinary grant funding is best attempted as part of the team-building process in collaboration with well-established Extension and research colleagues.

Scholarship

Scholarship is a means to provide demonstrable evidence that Extension programs are making a difference in communities (Culp, 2009). In Extension, defining scholarly activity can be somewhat ambiguous (Jones, 2012). Scholarship can take several forms, including publication of applied research results and Extension activities in peer-reviewed journals or fact sheets, and even assessing service. Adams, Harrell, Maddy, and Weigel (2005) listed 17 categories of scholarly activities for a "diversified portfolio of scholarship." Likewise, Culp (2009) suggested that exploration and discovery, sharing results and findings, teaching and learning, application and reflection, creative artistry, and integration are all forms of scholarly activity that Extension personnel should consider. Many times, scholarship is thought of as a symbol of the culmination of a project or program. Not only can scholarship highlight the results, but in Extension, it also can serve as a means to identify successes and challenges during the process.

Role of the Institution

The institution is vital to the success of Extension professionals, particularly in providing a means to support professional development. At the Extension services level (within the larger institution), the development of written guidelines to assist Extension faculty that are diverse in expertise will provide a foundation on which to build programs. Many of these guidelines can be general, yet others that are more specific will support diverse content areas that are the norm in Extension. Formal mentorship programs provided within content areas can assist Extension faculty in navigating promotion and tenure, as well as provide an advocate in the process. Support in program evaluation will also assist in keeping the new Extension faculty on track.

Conclusions and Implications

Table 1 on the following page summarizes topics relevant to first-year success in Extension as "Best Practices," gives suggestions for applying them to Extension work, and recommends when attention to each is indicated. For new Extension faculty to meet a broad range of professional expectations, a well-thought-out plan of activities directed at meeting those expectations is critical. Finding success early in the appointment will require a thoughtful examination of program delivery and the promotion and tenure process. A willingness to follow a timely and systematic approach to meeting the expectations of the institution and stakeholders will provide an efficient transition and relieve many stressors associated with a new Extension appointment.

Table 1. *Summary of Best Practices*

Best Practice	Personal Application	Time of Effort
Conduct formal needs assessment	• Make use of secondary data such as government publications, census results, industry publications, and local reports. • Conduct key informant interviews utilizing a variety of sources, such as community leaders, industry professionals, and researchers.	Months 1 – 6
Develop a plan of work	• Focus on three or four main points. • Plan with program evaluation in mind.	Months 6 – 8
Construct a logic model	• Use the logic model as a roadmap for Extension activities and evaluation.	Months 6 – 8 and for each new plan of work
Peer mentoring	• Identify tenured Extension faculty and/or Specialists to assist with career guidance (may be informal or required and assisted by the institution). • Initiate annual meetings. • Allow mentors to assist in development of the plan of work.	Entire promotion and/or tenure process
Identify collaborators and build teams	• Network with other Extension and on-campus faculty. Look for opportunities to engage the community, industry, and people from varying disciplines and other institutions. • Identify like-minded individuals with complementary expertise. • Seize opportunities to participate in projects initiated by collaborators.	Months 1 – 12
Professional development (PD)	• Identify professional development opportunities and secure the funds needed to participate.	Entire career
Grant writing and sponsorships	• Start early, consider the lag time between application and award of funding. • Use time wisely by focusing on proposals with a reasonable chance of success. • Participate in large projects as a collaborator with other faculty in the same discipline. • Take advantage of professional development opportunities associated with grant writing and acquisition of funding. • Be available to participate in the Extension component of large research grants with research faculty.	Months 6 – 12 and entire career
Scholarship	• Identify scholarly activity that is interesting and also realistic. • Consider several avenues of scholarship such as discovery, teaching and learning, application, creative artistry, and integration. • Identify where and how results will be documented.	Months 6 – 12 and entire career

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