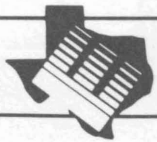
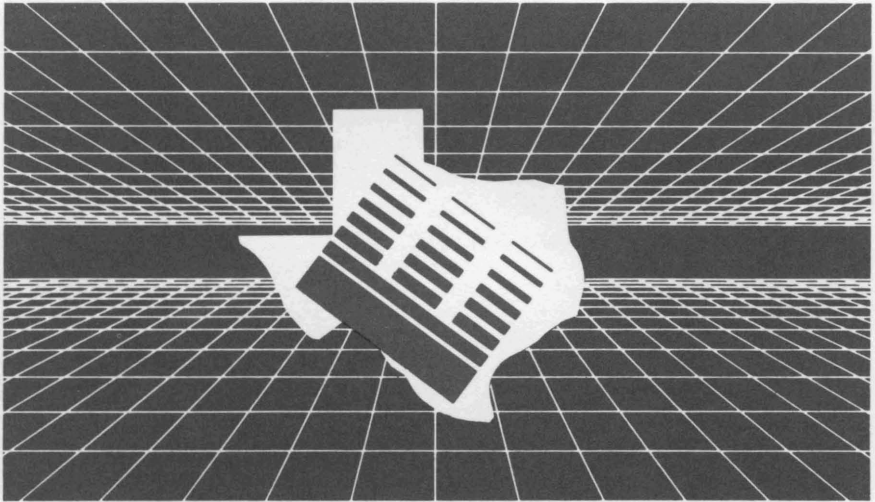


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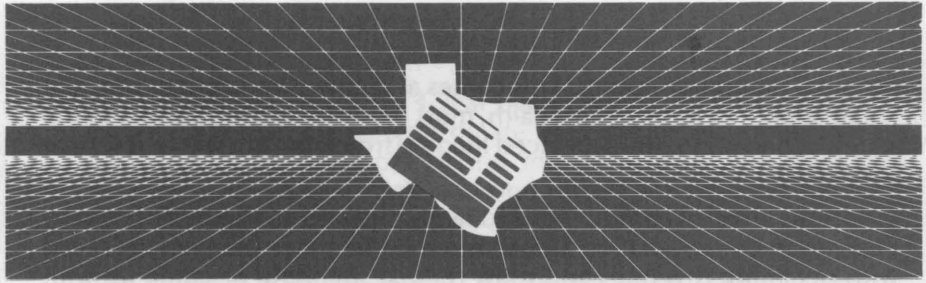
Texas Agricultural Extension Service



# An Assessment of Extension's Long-Range Planning Process: Programming into The '90s

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For more than 70 years the Texas Agricultural Extension Service (TAEX) has had a hand in helping to improve the economic well-being and quality of life of Texans. Extension's ability to provide educational programs designed to meet such a challenging task is due largely to three major factors. First, more than 18,000 leading citizens are involved annually in the Extension program development process of determining, planning and carrying out educational programs. Through their participation in county Extension Program Councils, local citizens' input helps ensure that TAEX educational programs are both relevant and timely in helping Texans to take advantage of existing and emerging knowledge and technologies. Second, Extension educational programs are based on documented research. As a consequence, Texans can have confidence in the accuracy of Extension recommendations. Third, a concerted effort in long-range planning for the past 25 years has helped allocate Extension resources to problems of greatest concern to Texans.

Notwithstanding their value, long-range programs are difficult to plan. The task of long-range planning has become even more difficult in the past decade because of major changes in the socioeconomic climate in Texas. For example, the state's population and economy have exhibited rapid changes during the 1980s—changes which have placed demands on the resources of both government and citizens alike. From 1970 to 1984, the state's population increased by more than 4.7 million. This included an annual rate of 2.9 percent between 1980 and 1984, as compared to an annual rate for the nation of less than 1 percent. Yet, the period from 1982 to 1984 brought a slowdown in Texas population growth. This decline in the rate of population growth in the state affected the economy as did the declining value of agriculture, oil and gas (1).

Agriculture, with an annual output valued at \$74 billion, is second only to the oil and gas industry in Texas. However, agriculture and agribusiness have been caught today in a cost-price squeeze that has reduced economic returns and profits to critical levels. Although Texas agriculture has tremendous potential for development, it faces new challenges in terms of shortages of, and increased competition for,

essential natural resources. This comes at a time when agriculture, as a major source of renewable wealth, must increase its contribution to the state's economy to offset reduced income from nonrenewable resource sectors (2).

Various areas of community and family life also are being affected by changes in the population and economy. Many communities are faced with declining revenues and must reduce spending or come up with new sources of revenue to support budgets. Families are experiencing financial difficulties and individuals face very stressful situations. Cases of teenage pregnancy and drug abuse are increasing.

To better identify needs of people impacted by a rapidly changing society, in 1984 the Texas Agricultural Extension Service expanded its long-range program process to include a large number of people not currently involved in Extension programming. This expanded effort was entitled **Programming Into the '90s**. Its overall purpose was four-fold (3).

1. To identify needs, interests and concerns as expressed by each county Extension Program Council. The viewpoint of this clientele is the cornerstone of effective Extension programs.
2. To identify socioeconomic trends and emerging problems as determined by special community groups.
3. To identify emerging knowledge and technology that are relevant to local problems and concerns.
4. To identify local, statewide and national interests and concerns as expressed by various Extension support groups, including legislative bodies, government agencies, organizations and advisory groups.

This report describes how "Programming Into the '90s" was created and the impact this effort has had on Extension programming in Texas.

## **Critical Decisions for Developing the Long-Range Planning Process**

The administrative staff of TAEX requested Program and Staff Development Specialists to help frame and implement the long-range planning process. Background papers were prepared to clarify alternative structures and processes, enabling administrators to make critical decisions in developing and implementing the long-range planning process. Some of these decisions included:

- All counties would begin a 4-year planning cycle in the same year so that TAEX could better coordinate long-range planning and the allocation of its resources to the most critical issues. Previously, counties used a 5-year cycle and one-fifth of the counties did long-range planning each year.

This decision affected county staffs, Extension Program Council members, supervisors and specialists. Counties which had recently revised long-range Extension programs had to repeat the process. The process was given priority so that supervisors and specialists providing support to on-going county programs could devote time to a new planning process. New long-range guidelines and support materials were developed.

- The county planning cycle (1987-1990) would begin 1 year in advance of the ES-USDA fiscal year cycle. The year between the two cycles would allow time to assemble and summarize county data for preparing the State Four-Year Plan required by Extension USDA.
- The long-range planning process would focus on "critical issues." An "issue" was defined as a broad area of concern which might involve several interrelated problems. After critical issues were identified, background information concerning major problems associated with issues would be developed.
- Study groups in each county would be organized to identify critical county issues. Additional leading citizens who were not serving on Extension Program Councils would be involved in forming each study group.
- Study groups would be divided into four task forces to identify issues specific to each of the four major areas of Extension education: agricultural and natural resources, home economics, community development and 4-H.
- After each task force identified and prioritized issues in its assigned area, the study group as a whole would review all issues and identify five to 10 issues which were most critical in the county. The prioritization of issues across programming areas helped direct limited resources to the most critical issues.
- Issues identified and prioritized by county study group task forces would be the basis for the 1987-1990 Long-Range Extension Program in each county.
- These county issues, in turn, would be summarized into statewide issues and used by TAEX in directing its use of resources for the remainder of the decade.

- Before implementing the issue identification process in each county, internal Extension staff groupings would be formed and key leaders would meet on a regional basis to develop resource information which would serve as a catalyst for county study groups.

These decisions concerning the long-range planning process were finalized between the fall of 1984 and the summer of 1985. The next step was to prepare resource materials to assist each county in developing a Long-Range Extension Program. A description of the process is described in the following section.

### **Development of Resource Material for Identifying Issues**

Staff groupings at state and district levels and key leaders at regional levels began the process by developing resource information to assist county study groups in identifying issues. Beginning in late 1984, specialist units identified broad areas of concern—major issues—in the program areas of agriculture, home economics, 4-H and community development. During the winter of 1985, groups of county agents in each Extension district identified and discussed issues they perceived as existing in the four program areas. In the spring of 1985, five regional meetings sponsored by TAEX were held across the state. More than 250 key leaders, identified by county Extension agents, district Extension directors and others, participated in day-long sessions. These leaders were challenged to help identify critical issues facing Texans between now and the turn of the next decade. Leaders were divided into the major interest groups: agriculture and natural resources, 4-H youth, home economics and community development. Then, the four groups reassembled to share reports of issues identified.

Results of these meetings were very positive. Extension staff and community leaders were pleased with the opportunity provided to discuss issues and circumstances being faced in their areas. These meetings also provided valuable information to guide the development of resource material and guidelines for the study group meetings which would be held in counties across the state.

During the summer and fall of 1985, a programming resource packet was prepared for county staffs to use in developing their Long-Range Extension Programs. The Program and Staff Development Unit prepared background papers to assist administration in finalizing the process and provided leadership in preparing a programming resource packet which included the following items:



- *A Study Guide to help stimulate discussion and decision making on critical county issues.* The issues identified at the five regional meetings were used by subject matter specialists in developing position papers on 25 issues. Each issue paper defined the issue, gave background information and alternatives for addressing the issue, and presented consequences if the issue were not addressed. References were listed for additional study of the issue.

The Study Guide also contained an explanation of how the 25 issues were derived and provided guidelines for how county study groups could use the guide to help identify issues in counties. Some 17,000 copies of the Study Guide were printed for county use.

- *A slide-tape set to assist county staffs in explaining the long-range planning process to study group participants.* The slide presentation explained the Extension system of education and challenged study group participants to identify critical county issues facing citizens through the remainder of the decade. Pertinent examples of Extension programs currently underway also were explained.

Five sets of the slide presentation were provided to each district Extension office for use at county study group meetings.

- *A 10-step outline for developing the county Long-Range Extension Program.* The outline provided steps for county Extension agents to use in organizing and conducting study group meetings and for writing and distributing the 1987-1990 Long-Range Extension Program.
- *Other supporting resource material in the resource packet included the following:*
  - A calendar of activities for developing the Long-Range Extension Program (LREP)
  - A guide-sheet for identifying key leaders for participation in county study group meetings
  - An example letter of invitation to leaders who would be asked to participate in the study group
  - A guide-sheet for study group and task force discussion leaders and recorders
  - An example agenda for the first county study group meeting
  - An outline for the moderator to use at the study group meeting
  - An executive summary form for agents to report issues identified after the study group meetings

- A guideline for agents' use in writing and distributing the LREP document and examples for writing county issues (including background information, objectives and accountability indicators)
- A supply of covers for the LREP with the county's name printed on each cover
- A publicity packet containing sample news stories, specially designed program agendas for study group meetings and a suggested plan for publicizing the process

## **Statewide Staff Training**

A statewide staff training project on long-range planning was conducted between November 1985 and January 1986. Training meetings were held for county staffs in each of the 14 districts and two were held at TAEX headquarters for specialists and administrators. More than 1,000 staff members participated in the training.

To help ensure effective continuity of the long-range planning process, one training team conducted the entire staff training project. The team included an Associate Director of TAEX and two members from the Program and Staff Development Unit.

Each 5-hour training session was designed to equip staff members with knowledge of the procedures and resource material for the 1987-90 Long-Range Extension Program. The content of training included the following points:

- Rationale and background for the long-range planning process
- Procedures for involving the Extension Program Council's executive board in identifying key county leaders and inviting them to the study group meeting
- Use of the slide-tape presentation at study group meetings
- A detailed explanation of the 10 steps to follow in completing the long-range planning process

## **Implementing the Long-Range Planning Process in Counties: Ten Steps**

Using a 10-step outline and supporting resource material for long-range planning, county staffs began the year-long process in January 1986. District Extension directors and specialists assisted county staffs in implementing the process. Two study group meetings were organized and conducted in each county and critical issues for the 1987-1990



Long-Range Extension Program were identified. The 10 steps are detailed below.

### **Step 1 (January 1986)**

Each county staff developed its own strategy for initiating the Long-Range Extension Program (LREP). Each county decided how and which key leaders would be identified for participation in the county study group. They set target dates for developing the LREP. County staffs prepared a list of key leaders to use as a beginning point when they met with the executive board of the Extension Program Council. This local strategy was then submitted to district Extension directors for review and approval.

### **Step 2 (January 15 - February 15)**

Each county staff met with its executive board of the Extension Program Council to identify 40 to 60 key leaders. Criteria used to select leaders included the following:

- Knowledge of the county situation and skill in identifying critical issues and in setting priorities
- Ability to plan, schedule and influence the work of others and to get others involved in solving problems
- Ability to express ideas to individuals and groups involved in the decision-making process
- Ability to perceive the needs, concerns and problems of others and tact in dealing with persons from different backgrounds

County staffs and executive boards together decided who would invite the leaders to the county study group meeting. In many cases, the county judge was chosen to send the letter of invitation. Arrangements were made for the initial study group meeting to be held during April. Individuals were selected for specific roles at the study group meeting, including the moderator, four discussion leaders and four recorders.

A total of 18,400 key leaders were invited to participate in the county study group meetings across the state. Of that number, 75 percent were not current members of county Extension Program Councils.

### **Step 3 (February 15 - March 31)**

Key leaders selected as study group participants received personal letters from the county judge or another designated person inviting them to participate in identifying critical county issues. Letters were followed up with a personal contact by agents and executive board members. The discussion leaders and recorders were provided training on procedures to facilitate the study group meetings.

### Step 4 (April 1-30)

The executive board and county Extension staff hosted the first study group meeting. Participation was excellent. Of the 18,400 key leaders invited, almost 12,400, or 67 percent, attended. As reported in Table 1, the leaders represented many walks of life and occupations.

Table 1. County leaders nominated for study group participation.

Occupational Category	Number of Leaders	Percent of Total
Business/industry/labor	3,544	19
Farmer/rancher	3,028	16
Education	2,062	11
Homemaker	1,875	10
Government (city, county, state, federal)	1,255	7
Agribusiness	1,245	7
Community organization	1,222	7
Financial institution	961	5
Other	946	5
Medical/health	696	4
Clergy	484	3
Volunteer leader	385	2
Mass media	383	2
Law enforcement	319	2
<b>Total</b>	<b>18,405</b>	<b>100</b>

After the purpose of the study group meeting was presented, the group was divided into four task forces, based on participant knowledge and interest in the area. They received instructions and began the process of identifying issues. Extension staff played only a facilitating role in the issue identification process so that the issues emerged from the participants themselves.

### Step 5 (April - May)

Each task force was instructed to meet independently and identify and prioritize critical issues in the assigned area that should be addressed in the next 4 years. Some issues were outside the mandate of Extension and were directed through Extension to appropriate agencies and organizations. For those issues within Extension's mission, groups developed background information on each issue, long-range objectives for addressing issues and accountability indicators to use in measuring progress toward solving each issue. Some task forces completed their assignment in one meeting. Others, feeling that their county and area faced more complex issues, met as many as four times.

### **Step 6 (June)**

County staffs assisted task force discussion leaders and recorders in developing a report on each identified critical issue. These reports were duplicated for distribution at the second study group meeting.

### **Step 7 (June 1-30)**

The four task forces within each county came together in a final study group meeting to hear individual task force reports. After an open discussion of all the identified issues, the study group as a whole identified at least five but not more than 10 issues which it felt were the most critical county concerns.

### **Step 8 (July 1-15)**

The executive board of the Extension Program Council and county staff reviewed the study group report. They agreed upon programs to be developed in addressing the identified issues during the county's 1987-1990 Long-Range Extension Program.

The county staff completed and submitted to the state office an "executive summary" report. This report included information about:

- The number of people involved in the LREP process by major program area
- The prioritized county issues by major program area
- The five to 10 most critical county issues

### **Step 9 (July - October)**

Each county staff prepared a draft LREP and submitted it to the district Extension director for approval. The LREP contained an explanation of the study group process, a record of key leaders who participated in the process and a one- to two-page description of each county issue in the four program areas.

District Extension directors made suggestions for improving each county's LREP. County staffs incorporated these suggestions and printed a minimum of 100 copies of Long-Range Extension Programs.

### **Step 10 (November 1986 - January 1987)**

County staffs made a formal presentation of the LREP to the executive board of the county Extension Program Council. Together, they developed a plan for distributing the LREP to the key leaders who participated in the study group and to other key groups and individuals in the county.

To assist county staffs in explaining the long-range planning process and the issues that were identified to other groups, a second slide-tape program was prepared. This slide set presented an overview of the county study group process conducted in all counties and provided an opportunity for agents to present specific county issues identified. A copy of the slide-tape program was placed in each district office for county use.

## **Statewide Issues and Programming Resources Developed**

From the submitted executive summaries, almost 5,000 county issues were processed for computer entry by the Program and Staff Development Unit during July 1986. The number of issues per county ranged from five to more than 30, with an average of 20 issues per county. The format for computerizing issues included:

- Program area: Ag/NR, HE, CD, 4-H
- Priority number given to the issue within the program area
- Designation of the issue as a top 10 issue
- County issue
- Statewide issue to which county issue related

County issues varied in scope. Some issues were broadly stated—agricultural profitability, health, etc. Other issues were more specific—fire ant control, high cost of insurance. A content analysis was conducted to group similar issues into broad categories. A computer “word-search” technique was used to group most county issues.

Extension agents, supervisors and administrative program leaders were consulted for sorting issues not identified by the word search procedure. Administrative leaders also were consulted for final determination of the statewide issue titles.

Similarities found in county issues led to 12 broad categories or statewide issues under which the county issues could be grouped. The 12 issues toward which TAEX will channel its resources in the next 4 years and the number of county issues grouped into each are reported in Table 2.

The high proportion of county issues grouped under the statewide issue of youth development is explained by the decision to have one major statewide issue on youth. This decision was made because of the ultimate objective of the 4-H program to help youths develop into productive citizens. As a consequence, most county issues relating to youths were grouped under this one statewide issue.

Computer printouts of issues were assembled into notebooks for use by key decision makers. Each notebook contained three sections:

- Each county's issues by program area
- County issues grouped by statewide issues
- A state summary of the number of issues by district and statewide issue

**Table 2. Critical issues identified by TAEX.**

Statewide Issue	County Issues Frequency
Agricultural Diversification	202
Agricultural Profitability and Competitiveness	534
Economic Development	338
Financial Planning and Management	289
Improving Nutrition, Diet and Health	321
Leadership Development	326
Marketing of Agricultural and Natural Resource Products	246
Revitalization of Rural Texas	602
Rural/Urban Relationships	106
Strengthening Texas Families	518
Water Quality and Conservation	274
Youth Development	920

Summaries of county and statewide issues were first distributed to administrative program leaders to use in making decisions about the development of new program resources needed to address issues. The summaries were later provided to specialist units and district directors, with final distribution to county staff units.

Administrative program leaders appointed an interdisciplinary committee of seven members to recommend a model for staff structure in developing the state long-range plan and the supporting resources needed for issue-based programming. They recommended, and administration concurred, that 11 interdisciplinary Program Development Committees be organized:

- Agronomic Crops
- Agriculture and Marine Resources
- Economic Development
- Financial Planning and Management
- 4-H Youth Development
- Forestry Resources

- Horticultural Crops
- Human Relationships
- Livestock and Poultry
- Nutrition, Diet and Health
- Rangeland Resources

These committees were charged with developing educational strategies for addressing the 12 issues. A coordinator was identified for each issue to coordinate efforts in identifying the major subject matter components or core curriculum necessary to support a plan of action for programming into the 1990s. As a result of these efforts, between November 1986 and May 1987, 12 Program Guides and accompanying slide-tape presentations were developed to assist county Extension Program Councils in planning and implementing issue-based educational programs. Position papers and other guidelines for the development and distribution of the Program Guides were prepared.

The 12 Program Guides provide background information on the statewide issues, including the following components:

- An issue paper including the issue's definition, alternate consequences of not addressing the issue and educational strategies
- Targeted areas that reflect the educational strategies of relevant interdisciplinary program development committees
- Problems, long-range objectives and curriculum outline for each targeted area

The purpose of each guide was to document how issues have multiple interrelated problems and cannot be resolved without working on several problems at the same time or in a connecting sequence over time. Each guide also identified subject matter of interrelated disciplines that should be considered in addressing the issue.

The 12 guides, one for each issue, were assembled into two binders for use by county staffs, specialists and supervisors. The size of a county staff determined the number of guides that staff would receive. The slide-tape presentations on issues were placed in each district office for use by county staffs.

During the 6-month period that the new programming resources were being developed, complementary actions were taking place. A statewide issue publication entitled "Texans Take Action on Critical Issues" was developed to interpret statewide issues that would receive emphasis by TAEX from 1987 through 1990. Some 21,000 copies were



distributed to TAEX staff, county study group participants, commissioners courts, county Extension executive boards, regional meeting participants and county, state and federal elected officials. A similar publication entitled "Putting Knowledge to Work for Texans" was developed and approximately 15,000 copies distributed. This publication identified the 12 statewide issues and presented brief objective statements of current educational programs that address the issues.

## **Implementing and Evaluating the Long-Range Extension Program**

A second statewide staff training project was initiated in January 1986. The focus of the training was implementing and evaluating the 1987-1990 Long-Range Extension Program. The same team which conducted the initial LREP training conducted the follow-up training. Meetings were held in each of the 14 Extension districts and one at state headquarters. The training included the following components:

- Explanation of how county issues were computerized and grouped into the 12 statewide issues
- Revision and update of county issues
- Concept of issue-based programming utilizing a systems approach
- Purpose, contents and use of the Program Guides
- Reporting and evaluation procedures for issue-based program accountability
- Increasing visibility and program effectiveness of the county Extension Program Council

Issue-based, long-range programming is now underway in Texas. The initial reactions and support have been very positive. The task remains to implement this innovation and evaluate its impact in meeting the needs of Texas citizens.

## **Summary and Conclusions**

From 1970 to 1984, the state's population increased by more than 4.7 million. During the 1980s, the population increased at an annual rate of 2.9 percent, compared to a less than 1 percent annual rate for the nation. At the same time, agriculture and agribusiness were suffering from a cost-price squeeze that reduced economic returns and profits to critical levels. The state's economy was on the decline. Communities were faced with tough decisions. Families were experiencing financial difficulties.

As Extension faced the coming decade, it became evident that the existing long-range planning process would not adequately identify needs of people impacted by a rapidly changing society. The long-range planning process had to be modified to accommodate rapidly changing needs and diminishing resources. As a consequence, the long-range planning process was revamped and a new strategy implemented in every county across the state. County study groups, composed of leading citizens from many walks of life (many of whom were not actively involved in Extension planning and/or programming), were organized by county staffs and Extension Program Councils to help identify the most critical issues facing citizens through 1990.

This long-range planning process has been one of the most dynamic and successful program development efforts by TAEX in recent years. Every county in Texas has a Long-Range Extension Program covering the same period of time. More than 12,390 leading citizens were involved in identifying and prioritizing almost 5,000 county issues. Many Texans who had limited knowledge of Extension now better understand Extension's role in informal education. New programming resources were developed to help address the 12 statewide issues toward which TAEX will channel its resources over the next 4 years. A revised reporting and evaluation procedure based on issue-based programming has been developed and implemented for improved accountability of Extension resources. This long-range planning process helped TAEX ensure that its programs are in the mainstream of a changing society.

### **Unanticipated Results**

- Other agencies were identified and asked to assist in resolving issues outside Extension's mission.
- Past efforts to provide background material before initiating issue identification often restricted development of alternative ideas. The study group process was structured so that issues were identified before background information was developed to substantiate the issues. This not only reduced barriers to discussion, it also identified pressing issues for which there was limited research information.
- Continued involvement and concern were expressed by key leaders who had had little or no previous involvement with Extension. Some expressed a desire to serve on committees to work on issues. Others wanted to be kept informed about what happened after the issues were identified.
- Various county Extension agents immediately initiated new program efforts based upon the study group meetings, even before completion of the new Long-Range Extension Program.

## Factors Contributing to Success

Major factors which contributed to the success of the long-range planning process included:

- A thorough review of knowledge related to program planning and development as it relates to the long-range planning process.
- The use of a “grassroots approach” involving leading citizens in the identification of critical county issues. The value of grassroots involvement in priority setting has been increasingly challenged in recent years. Some authorities have questioned whether local citizens can objectively develop educational programs—whether they can identify issues and perceive the problems which affect them. In paraphrasing Dr. John E. Hutchison, Director Emeritus of the Texas Agricultural Extension Service, **unaided**, citizens would generally be unable to do this. Extension staff members, therefore, need to provide a framework through which citizens can objectively examine their situation. Extension staff also must be the catalysts and provide direction in the collection, analysis and interpretation of information. Evidence from the TAEX long-range planning process confirms Dr. Hutchison’s philosophy (4).
- Long-range planning guidelines and supporting resource materials which were specific and useful to staff in initiating and completing the process on schedule.
- A statewide training program involving training before and during the process which provided staff with the knowledge and procedures to do the job.
- The involvement of influential leading citizens who were knowledgeable of issues and willing to devote time to the planning process.
- The training of key leaders in charge of study group meetings on their duties and responsibilities.
- The distribution of checklists to both county staffs and district supervisors for use in monitoring progress and to facilitate communications between district supervisors and administrative program leaders.
- The publicity generated by the process focused attention on and interest in Extension’s ability to extend educational information designed to address issues important to Texans.
- The dedication and commitment of Extension staff to the process.
- The flexibility and expertise of the Texas Agricultural Extension Service to coordinate the development of new programming resources and channel its resources to address the most critical issues facing Texans for the remainder of this decade.

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*Educational programs conducted by the Texas Agricultural Extension Service serve people of all ages regardless of socioeconomic level, race, color, sex, religion, handicap or national origin.*

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