

**REPORT
OF THE
ISU EXTENSION FUTURING COMMITTEE**

**SUBMITTED
TO
VICE PROVOST STANLEY JOHNSON**

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Introduction

In 2003, Extension in Iowa entered its 100th year of providing service to Iowans. Throughout its century of service, the needs and priorities of Iowa's citizens and businesses have continued to evolve. As Iowans' needs and priorities change, ISU Extension must have the internal capacity to examine and evaluate its efforts and, as appropriate, redirect its resources where they are most needed and will have the most impact.

In October, 2002, Vice Provost for Extension Stanley Johnson appointed a group of ISU Extension staff and customers to provide guidance to the organization as it adapts to changing conditions in the short-term and into the future. The vice provost provided the Futuring Committee with the following charge:

- Assess the environment in which Extension operates and the major tendencies for change in this environment.
- Develop a vision for the future of the organization that is consistent with the new environment and the mission of Extension.
- Prepare a roadmap and guidelines for change that are consistent with the evolving environment, the vision and the mission of Extension.
- Establish priorities for change based on the vision and roadmap.

The complete charge to the committee is included as Appendix A.

The Futuring Committee was comprised of 19 members representing Extension staff and customers and was co-chaired by Duane Acker, a member of the ISU Extension Citizens Advisory Committee, and Steve Padgitt, ISU Extension Communities program director (see Appendix B for a list of committee members and their affiliations).

To help the committee fulfill its charge, Enterprise MidAmerica, a public policy consulting firm based in central Iowa, was retained to provide facilitation and organizational support. Phil Dunshee, president, and Tori Squires, senior project manager, provided assistance to the Futuring Committee as it undertook an intensive four-month effort, which involved examining existing documents and plans, gathering and reviewing input, and meeting as a group to discuss and develop its findings and recommendations on each of the four elements of the charge to the committee.

Given the vice provost's charge, the committee attempted to add value to previous analyses. Three documents were regarded as especially valuable. First was the report of the Governor's Strategic Planning Task Force, "Iowa 2010, the New Face of Iowa." Second was NASULGC's* Extension Committee on Organization and Policy (ECOP) report, "The Extension System: A Vision for the 21st Century" that drew heavily from the Kellogg Commission's report on the Future of the Land-Grant Universities' report, "Returning to Our Roots: the Engaged Institution." Third was ISU Extension's own "ISU Extension Strategic Plan 2001-2005." Additionally, the committee also had at its disposal and available for review two previous assessments of ISU Extension. These were "Final Report to ISU Extension Administration from the Steering Committee to Improve ISU Extension Operations" (May 9, 1994) and "Future Directions: Continuing Excellence in Serving People" (November 1985).

* National Association of State Universities and Land-Grant Colleges

Mindful of the interest its work would have on ISU Extension and Iowa citizens and businesses, the Futuring Committee was committed to maintaining an open process that allowed interested individuals and organizations to review its progress and provide input throughout the effort. A number of channels for input and review were established, including the following:

Area Input Sessions

To gather input from ISU Extension staff, customers, stakeholders, and others interested in the future of the organization, area input sessions were held during November, 2002, in Cherokee, Iowa City, Lewis, New Hampton, Prairie City, and Des Moines. An additional session was held on the Iowa State University campus to provide an opportunity for campus faculty and staff to provide their thoughts on the future of Extension.

Persons attending these meetings were asked to share their views and observations on several subjects relating to the existing environment and the future of Extension and the state of Iowa. Topics of discussion included issues and trends affecting the state and Extension, new service delivery approaches or structures that should be considered by Extension, recommended organizational and operational changes within the organization that could help Extension better deliver services to Iowans, aspects of Extension that should be retained or maintained, and criteria that should guide Extension in determining its service priorities.

Invitations to the area meetings were disseminated through a number of channels, including targeted announcements to staff, customers, and public and private stakeholder groups, and the distribution of press releases to media throughout the state. More than 200 individuals participated in these meetings.

Input from each of the meetings was compiled and provided to the Futuring Committee for review and consideration as well as posted on the committee's web site for review by the general public and Extension staff and faculty.

E-mail Address

An e-mail address was created to enable individuals to communicate with the Futuring Committee. The e-mail address was utilized by a number of individuals who wished to provide their comments and observations on Extension or who had questions regarding the committee. Input provided through e-mail was compiled and provided to the committee for review and posted on the Futuring Committee web site.

Web Site (<http://www.enterprisemidamerica.com/WebSite/default.html>)

The Futuring Committee web site was developed early in the work of the committee and it will remain active for a period following completion of the committee's work. The web site provided a single location for the public to access and review information relating the committee's effort. The site also served as an additional vehicle for individuals to provide input into the process through an on-line questionnaire, which asked respondents to answer a series of six open-ended questions regarding the future of ISU Extension. These questions corresponded to those used as the basis for discussion at the area input sessions. This mechanism provided individuals with a means of sharing their opinions anonymously. A list of the materials available on the web site is included as Appendix C.

By accessing the web site, visitors could scan a list of Futuring Committee members, examine resource documents used by the committee in developing its report and recommendations, review

committee meeting and area meeting summaries, and read input provided to the committee through the on-line questionnaire, e-mail, and direct mail.

Futuring Committee Updates

Periodic updates on the committee's progress were circulated through an extensive e-mail distribution list. This list included ISU Extension staff and faculty, county advisory council members, and stakeholder organizations.

Taking into consideration information from existing documents along with the input received from ISU Extension staff and customers in the listening sessions and through Internet feedback, the Futuring Committee offers the following discussion relating to the charge from the vice provost.

Committee Charge 1

Assess the environment in which ISU Extension operates and the major tendencies for change in this environment

Twenty years ago the futurist John Naisbett published “Megatrends: Ten New Directions Transforming our Lives” (New York, Warner Books, 1982). As much as any recent single publication, “Megatrends” sparked an interest and captured the fascination of leaders and prompted many to become attuned to and use forecasting methods to identify trends impacting their own organization’s future in order for them to lead in a proactive way. In a similar fashion, the Futuring Committee found trends listed in both ECOP’s “A Vision for the 21st Century” and the Governor’s Strategic Planning Council’s “Iowa 2010” reports quite instructive and worthy of repeating. ECOP’s list addresses contemporary national changes while the Governor’s Strategic Planning Council focuses on Iowa. The Futuring Committee’s own work along with the ideas from staff and customers was directed toward trends affecting Extension in Iowa.

The trends listed in the ECOP report are under the heading “Challenges for Extension” include the following:

The changing face of America: The nation is becoming more multilingual and multicultural, and the trends in characteristics such as age structure, place of residence, and ethnicity are making a dramatically different society. The report asserts nowhere is the impact of this new mix more clearly demonstrated than with families, and it challenges Extension to respond to the needs of families and to the diversity of communities and workplaces by being mindful of the distinct generational, social, and ethnic trends that will define our society in the future.

Globalization: World-wide changes in financial, service, manufacturing, and agricultural sectors are having profound influence on all facets of American society, and the time-honored rules of business and commerce have been irreversibly altered. The report challenges Extension to provide leadership to demonstrate local implications and potential consequences of these changes.

Community capacity and vitality: Both rural areas and inner cities experience the loss of economic vitality, shrinking tax bases, decaying infrastructures, loss of population and political power, and they lack adequate investment capital. The challenge for Extension is to think broadly and to address the social and economic issues that face all communities.

Information technology: New technologies have developed rapidly and will be a dominant factor in education and lifelong learning. The opportunities and challenges are great, but the need to act quickly is imperative. Among the challenges to Extension are to be successful in on-line technology transfer and just-in-time learning.

Rapid change: Change brings risks, uncertainties, and tendencies to react without thorough analysis or understanding. American democracy depends on an informed electorate and citizens who can think critically, communicate clearly, and act decisively. The challenge to Extension is to promote public understanding and create an atmosphere for open and honest deliberation.

In its projections to the year 2010, the Governor's Strategic Planning Council notes the following trends for Iowa:

Shifts in population, especially an out-migration of young Iowans and other factors resulting in projections for a shortfall of workers.

A wage rate that trails national averages.

Isolation of rural regions from employment and access to jobs because of differential access to electronic technologies.

Changing job markets and educational needs as a result of advancements in science and technology.

A global economy that is increasingly information-dependent rather than production driven.

Threatened air, water, and soil quality that could potentially harm the quality of life in the state.

To a remarkable degree the trends listed above capture the input the Futuring Committee heard at its several listening sessions and via other feedback. At the listening sessions the trends were documented using Iowa and local examples. Frequently, examples were more tangible and in the context of current Extension programming areas of agriculture and natural resources, family, youth, business and communities.

Clearly, there is a recognition that Iowa and the needs of Iowans are vastly different from only a few years ago, and while Extension has changed its heritage and tradition are simultaneously a source of strength and an impediment to change.

With regard to agriculture, the following trends were identified:

- Most of Iowa's land remains in farms and although commodity crops will dominate land use in the near term, there is great interest to diversify Iowa's agriculture production.
- Dual systems, or dichotomies, are emerging in Iowa agriculture. Examples include independent farmer versus contract production, part-time producers versus full-time operations, GMO versus non-GMO, commodity versus value-added or "product" orientations, sustainable versus conventional production practices. In each of these there is a growing need to mediate competing interests and conflicts.
- Iowa landowners and farmers are aging and plans need to be in place for a new generation of operators in order to minimize the potential for increased absentee ownership of Iowa's farmland.
- Food safety and agricultural bio-terrorism are issues that are an increasing concern in the world.
- There is increasing pressure on agricultural producers to address environmental quality.
- The average size of farms continues to increase and the number of farmers continues to decrease.

With regard to families and youth, the Futuring Committee concurs with the Extension 21st assertion that nowhere is the impact of the changing face of America (and Iowa) greater than for families. The following trends were identified:

- The special needs of growing numbers of immigrant households, minority populations, and persons living in poverty.
- Iowa leads the nation in percentage of households with children where all adult members are in the workforce.
- The challenges of an increasingly aging population and the accompanying needs for nutrition, health, and housing.

- The increases in the percentage of children living in single parent households and non-traditional households.
- The increases in the percentage of children living in changing and dysfunctional settings without stable adult role models.
- The vulnerabilities of youth to not achieve to their potential but engage in less than optimal decision making and succumbing to high-risk behaviors.
- Increasing demands on Iowa individuals and families have created the need for resource management skills, e.g., time management and financial management.
- The need for affordable, quality child care.
- Health and health care issues, such as obesity among all age groups and availability and affordability of services.

With regard to Iowa businesses, the following trends were identified:

- Loss of full-time manufacturing jobs in the state.
- Loss of Iowa ownership of Iowa companies to out-of-state and international investors.
- Globalization and competition from other nations.
- Reduction of outlets for distribution of manufactured goods.
- The demand for high-level skills exceeds the supply of workers to fill these needs.
- The distribution of jobs tends to be lower-wage jobs, which are often not commensurate with maintaining a “living” wage.
- Lack of a propensity to engage in and support entrepreneurial business ventures.
- Decline in workers who possess traditional high-quality, hard-work ethic.

With regard to Iowa’s communities, the committee heard the following concerns:

- Out-migration and the decline in population in rural areas and small communities. Frequently, this is resulting in less than a critical mass of people and resources to maintain viable economic and social institutions and physical structure in local communities.
- Conversely, growth of selected regions where issues of sprawl call for the need for orderly growth.
- New Iowans increasingly represent diverse ethnic backgrounds.
- The need to capture opportunities accompanying information technology for rural communities, but noting the lag in access to infrastructure and services.
- The devolution of responsibility for human services to local governments without adequate accompanying resources, both fiscal and human.
- Trends toward regional patterns in economic and social institutions as well as personal lifestyles.
- The need for models to assist local leaders in cooperation, collaboration, and consolidation.
- The need to expand the pool of local leaders.
- As school enrollments change, some regions of the state may need to explore alternative education delivery structures.

For the future of Extension in Iowa the Futuring Committee finds that, unmistakably, Iowa and Iowans are more heterogeneous and diverse today than a generation or even a decade ago. This is occurring in many spheres of human activity and most indicators suggest the trends will only accelerate in the future. The Futuring Committee suggests geographic delineation is only one basis from which to efficiently initiate, develop, deliver, and administer effective Extension programming.

The committee also suggests that planning for future changes in programs and services of Extension need not be organized around the existing categories of agriculture, families, youth, business and communities, but on issues and services that draw upon interdisciplinary and holistic approaches to problem solving and program and service delivery. For ISU Extension to fulfill its mission in an information-based society, the expectation is not more information, but targeted, usable information on

customers', not providers', terms. Moreover, because of the growing heterogeneous interests and characteristics of Iowa residents, knowledge and information must play mediating roles to help build upon common interests and goals.

Committee Charge 2

Develop a vision for the future of the organization that is consistent with the evolving environment, the vision and the mission of Extension

In 1862, Congress passed and President Lincoln signed into law the Morrill Act that established the nation's land-grant colleges and universities. Iowa was the first state to respond and charter such an institution. One hundred years ago and fully a decade before Congress passed the Smith-Lever Act setting up Cooperative Extension nationally, Iowa opened its first county extension office. The original vision for land-grant colleges and universities included a priority to serve common people and an expectation to develop knowledge targeting the lives and businesses of those populations. In the 19th century and well into the 20th century, audiences for land-grant institutions, but particularly Extension, were largely rural, the businesses were agricultural, and mechanical arts dominated. The vision was to create knowledge relevant in this context and make it accessible to these audiences. The vision to serve interests of common people remains central to Extension's mission. However, today the characteristics of customers and stakeholders are quite different geographically, economically, socially, and demographically.

As we enter the 21st century, land-grant universities are challenged to adapt and not be captive to their past; otherwise, they may be destined to having limited relevance. This admonition is abundantly clear and strongly stated in George McDowell's "Land-Grant Universities and Extension into the 21st Century—Renegotiating or Abandoning a Social Contract" (ISU Press, 2001). McDowell documents the risks to land-grant universities and Extension services if they rely on past practices, do not adapt to the realities of a changed world and, perhaps, try too strongly to emulate Ivy League institutions. This message is also a central theme of the Kellogg Commission on the Future of the Land-Grant Universities' report, "Returning to Our Roots" where the importance of provider and customer is promoted as a mutual effort and in partnership to further learning, discovery, and engagement. This vision is incorporated in ISU Extension's 2001-2005 Strategic Plan and is, perhaps, stated most directly in the mission statement:

Iowa State University Extension builds partnerships and provides research-based learning opportunities to improve the quality of life in Iowa. We believe in quality, access, diversity, and accountability. We are dedicated to engagement, entrepreneurship, and local presence.

The Futuring Committee endorses this mission statement and finds the Kellogg Commission's seven-part test of engagement as useful criteria to help benchmark this mission. The seven factors are:

Responsiveness, including building upon the possibilities of Extension's community-based centers and offices, and opportunities to customize resources with local expertise.

Respect for partners through sharing credit for accomplishments and use of fiscal and human resources.

Academic neutrality, an essential attribute if Extension is to be a credible organization to enable people to improve their lives and communities.

Accessibility, including its many dimensions and contexts, including local presence, understandable interpretations, and appropriate delivery media.

Integration and interdisciplinary approaches that give priority to customer needs.

Coordination with the broader university and not merely traditional Extension.

Resource partnerships in the quest to be entrepreneurial in acquiring fiscal and human resources.

Although the wording and perhaps nuances in meaning are different, the ISU Extension strategic plan identifies similar characteristics for an engaged institution. In the strategic plan, the following characteristics are listed:

- An entrepreneurial spirit.
- Build and develop partnerships.
- Use information and technology effectively.
- Anticipate stakeholder needs.
- Proactive community involvement including challenges and opportunities relating to changing and diverse cultures in the state.
- Strong linkages between engagement, discovery, and learning to benefit Iowans.
- Strong connections to policy-makers and decision-makers.
- A team culture emphasizing diverse thinking, and partnerships for a balance of knowledge-based and skill-based education and services.

These attributes, if communicated to the citizens of Iowa and adhered to by ISU Extension, provide a working vision for the organization. If Extension administration, faculty, and staff are conscientious stewards of the public resources provided, and if they are similarly creative and entrepreneurial in seeking and securing additional resources to further the mission as already articulated in the strategic plan, then the Futuring Committee believes ISU Extension will, indeed, play a meaningful and significant role for Iowa and Iowans in the years and decades ahead.

Committee Charge 3

Prepare a roadmap and guidelines for change that are consistent with the evolving environment, the vision and the mission of Extension

To the charge of preparing a roadmap and guidelines for change, the committee's response is organized around six central themes. These themes align with the current Iowa State University and ISU Extension strategic plans as well as with the engagement guidelines specified in the "21st Century" report. The themes were assimilated from the many ideas and suggestions provided the committee as well as from its own deliberations. Under each theme several issues have been identified by the committee that should be considered and addressed in order to achieve the recommended guidelines for change. Following this is a short commentary providing additional explanation and context for the theme and identified issues. The six themes are:

- Breadth of Clientele and Subject Matter
- Role and Posture
- Geographic Presence, Coverage, and Input
- Collaboration and Relationship to Other Entities
- Program Delivery Modes
- Internal Actions and Accountability

Theme 1: Breadth of clientele and subject matter

ISU Extension should consider all Iowa business, societal, and governmental segments as potential clientele. Services to them should be based on priority needs. Within available and achievable resources, Extension should utilize all university colleges and units in interdisciplinary approaches as it serves Iowans.

Issues:

- a. How can Extension serve Iowa-based manufacturing and other non-farm businesses to grow, profit, and contribute to Iowa economic development as it has done for agriculture?
- b. To what extent do all faculty have obligations to make contributions to the 21st century land-grant mission of the university? Faculty in some ISU colleges (and perhaps some deans and department heads) are less knowledgeable and certainly have fewer resources to devote to the land-grant Extension mission. Currently, Extension resources are ear-marked for some subject matter areas more than for others. Some colleges have very limited resources for Extension. Within some units, private consulting is encouraged in lieu of, or in some cases in competition with, Extension work. At issue is how Extension can tap available expertise of all faculty and how to establish fair expectations and rewards.
- c. To what extent and in what forms should all ISU faculty and staff with teaching and research responsibilities in the colleges and departments contribute to Extension's function and clientele needs?
- d. Additionally, what are ways Extension units can be more integrated into existing and emerging research units of all the colleges at ISU? The committee believes there is opportunity and potential to strengthen these linkages. For example, how can the 4-H/youth staff and programs be linked to research and talent within colleges or departments, e.g. Colleges of Education and Family and Consumer Sciences, the Departments of Psychology and Human Development and Family Studies, or the Institute for Social and Behavioral Research? Or, how can community development, agriculture/ natural resources,

business/industry programs be enhanced with linkages to the College of Business or the Pappajohn Center for Entrepreneurialism?

- e. To what extent does the existing label of “Agricultural Extension Districts” in the Iowa Code and identified in real estate tax assessments and statements send a message to county staff, taxpayers, and the public that Extension is largely for agriculture and related activities? Should the Iowa General Assembly drop or replace the word “agriculture?”

Commentary:

The research and knowledge base of Iowa State University is broad. Extension should have access to and utilize the full breadth of those resources. Extension should evaluate its link to present clientele and adapt the principles that have been successful to new and emerging populations and issues. Extension cannot address the diverse needs and issues to serve a broader clientele through the resources of a portion of the university.

Like any service organization, ISU Extension must determine who its customers are and what services it will offer to those customers. These questions are poignant today not only because there are finite resources, but also because the economic, social, and demographic environment has changed so much. No longer is there a single “mass society” where “one size fits all.” Rather, today’s world is more aptly characterized by “multi” in a host of contexts, whether it be cultural diversity, farming/business operations, family systems, or personal lifestyles.

If Extension accepts the challenge to increase its breadth of clients and subject matter, it will need to be extraordinarily creative and efficient in its operations. Presently, Extension has enviable models for the training of others in a kind of “wholesale” brokerage, and it also effectively uses volunteers to serve customers and to carry out its mission. These models will likely need to be expanded, and new ones will need to be developed. Also, Extension administration must support staff and lead the dialogue to educate clients and stakeholders about the new mission for ISU Extension to be more broadly based and the kinds of service expectations that will follow. Accessing the full knowledge base of the university will have benefit for existing clients as well as serving new customers.

Theme 2: Role and posture

ISU Extension should be an active leader and catalyst on critical issues affecting personal and professional lives of Iowans. These critical issues are clearly stated as eight goals in the “Iowa 2010” report. ISU Extension should focus its resources and services on helping to achieve those goals (or a subset of them) and be recognized as making long-term positive impacts on the state of Iowa in that regard. These efforts will be significant and gauged on their contributions to personal, business, and societal success. Further, Extension should develop and finance credible, knowledge-based programs that advance these goals. To do this, Extension should be entrepreneurial in identifying and seeking adequate resources for high quality programs and services consistent with the mission.

Issues:

- a. Recognizing that public resources should be used to finance services and activities with public value and that private resources should finance activities that have private gain, what is the dividing line?
- b. With finite resources, how can Extension best respond to service and program needs of individuals, families, businesses, organizations, and communities less able to pay?
- c. How can Extension staff be trained and prepared to insure their programs are objective and totally credible? Staff possess personal values, professional training, and considered judgment. Yet social issues are often controversial because scientific knowledge is not totally definitive or the solutions to questions are not exclusively scientific.

- d. How can Extension provide meaningful venues for public dialogue on controversial issues? How can Extension provide and also be recognized as providing fair and neutral input for informed decision making?

Commentary:

While Theme 1 calls for increasing the breadth of Extension work, the committee's endorsement of the Iowa 2010 goals helps to begin the focusing process. The committee agreed that ISU Extension should be a proactive organization by offering programs that are state-of-the-art in knowledge and that anticipate change. Extension should not seek to provide programs or services on every issue, nor, perhaps, every goal within Iowa 2010. It should, however, be creative and entrepreneurial to find resources that focus its work where there are otherwise gaps. It should not lose its commitment to serve those who are underserved, disenfranchised, or who have limited access to information services through other venues because of limited economic resources or social circumstances.

The committee received much input and it deliberated at length about Extension's role, relationship, and niche vis-a-vis research and scientific information. There was consensus that research information disseminated by Extension must be credible and reliable. There was less consistency whether that description characterized Extension. More importantly for the future, information--research based and otherwise--will be increasingly accessible. At times clients and customers will be exposed to information of questionable validity. Extension's niche is its direct links to scientists; and its hallmark must be purveyor of credible information. Complementing this niche is the role to assist customers to use knowledge in ways to build the capacity of individuals, businesses, organizations, and communities to act on their own best interests. For this to happen, Extension must assure all staff have a minimal set of skills to understand basic scientific principles and to recognize their own limits in this regard. Some staff will have special expertise in interpreting scholarly knowledge to the public while others will have special expertise in capacity building.

Theme 3. Geographic presence, coverage, and input

ISU Extension should maintain an office presence in every Iowa county for activity coordination and as a link to Iowa State University. Subject matter professional staff should serve multi-county, area or statewide audiences. Generally, work of these staff would not be limited by county lines. County Extension Councils should recognize the potential subject matter breadth of ISU as a resource for all county residents. County councils are urged to be creative, participate in, and support appropriate multi-county programming and staffing.

Issues:

- a. Would housing area subject matter specialists together increase interdisciplinary work, collaboration, coordination, and a higher level of service to customers?
- b. Would co-locating county extension offices with partnership organizations better serve clientele, increase exposure, and save operating funds? If so, who would the partnership organizations be? When is co-location justified? What criteria should be used?
- c. Are there opportunities for Extension to provide services for other organizations? Or, are there opportunities for other organizations to provide Extension services on a contractual basis?
- d. What should be the staffing pattern, programming responsibilities, and administrative roles for county Extension offices? What level of education and expertise is required to fulfill the essential functions? What orientation and training should be provided? Given finite resources, is parallel staffing among all counties a realistic configuration? Do the dichotomous categories "professional" and "paraprofessional" contribute to a tiered system and one perceived as elitist?

- e. If client problems are shared beyond county lines and much subject matter programming is multi-county, should Extension councils be organized and function as multi-county? If so, what should be the structure and how can it evolve? What is the role of Extension administration, of elected councils, and of the Iowa Association of County Extension Councils in nurturing this transition?

Commentary:

Unquestionably, how best to provide for a physical presence and to provide access to content expertise will be an ongoing challenge. In the context of finite resources, population shifts (over half of Iowa's counties reached their peak population in 1920 or earlier), and the committee's own recommendation to serve broader audiences, new and more flexible models are needed for Extension's service delivery system. New communication technologies will be part of the solution, but the committee heard staff and customers effectively articulate the value of face-to-face contacts and continuing relationships, both of which are generally assumed to be more costly and, ultimately, reach fewer customers.

The committee heard feedback and discussed the important roles of office assistants and "paraprofessionals" in county offices. Information available to the committee suggests the increased use and role of paraprofessionals needs systematic attention and review. There is risk of a two tiered system emerging where differences in activities and value to the organization may be undifferentiated. Likewise, there seems to be concern about consistency in credentials and job descriptions, training, supervision, and professional development.

The committee considered a statement that every county office should be staffed with a professional staff member, defined as Master's degree or equivalent. It did not endorse that position. Rather, the sense of the committee was that flexibility is needed for alternative office and staffing patterns, including the option of multiple offices in highly populated counties.

Theme 4: Collaboration and relationship to other entities

ISU Extension should encourage and be entrepreneurial in fostering collaboration with other education and service providers. Potentially, among other providers are community colleges, public and private schools, business organizations, state and federal agencies, not-for-profit organizations, and others. In each case, Extension and the collaborators should mutually define the goals to be achieved, the roles of each partner, and the terms for acknowledging participation and contributions.

Issues:

- a. How can ISU Extension and its staff be assured their materials will be appropriately identified and acknowledged? How is this concern reciprocated with collaborators?
- b. How can ISU branding and the use of trademarks/logos contribute to greater identity and recognition of ISU Extension? What policies and guidelines need to be developed?
- c. How can the ISU nameplate be made applicable or adaptable in joint efforts in which ISU Extension is engaged with other universities or organizations, insuring appropriate and full recognition to both Iowa State University the collaborators?
- d. (Also, see Issues b and c under Theme 3.)

Commentary:

If ISU Extension is to expand the breadth of clientele, an important strategy is to leverage its resources and expertise with the talents and resources of other organizations in Iowa. Collaborations are potentially rich in a number of circumstances. In some instances, they may bring financial resources, but just as important is the opportunity to share and support related and integrated subject matter to benefit a

common audience. Often, Extension may possess the subject matter and other entities will have cultivated the audiences. In other situations, the roles will be reversed. Or, more likely when responding to new issues, the above examples are overly simplistic and pooling of all aspects of planning, acquiring resources, recruiting audiences, program delivery, and recognition for resulting impacts could be shared.

A significant part of the committee's discussion and the input it received concerned issues of marketing, branding, and sharing recognition with cooperating organizations. The input was diverse. One theme was frustration that Extension did not receive fair recognition for its work. But the opposite was also heard where Extension was alleged to not always give fair recognition or was reluctant to enter into equal-contribution arrangements. The committee did not systematically validate the assertions. Importantly, however, these statements demonstrate the complex nature of forming and maintaining positive collaborative relationships as well as the need for Extension staff to be willing and equipped to manage these challenges.

Theme 5. Program delivery modes

ISU Extension should use—and be known for using—modern and efficient knowledge transfer systems for today's customer-driven environment. Increasingly, this means access on the customer's terms. "Just-in-time" and "24/7" availability are recurring expectations. The systems Extension uses should be efficient and effective with the focus being meeting clientele needs within the available and achievable resources. Techniques such as web sites, automatic email, toll and toll-free telephone lines, interactive DVD learning, videos, video-teleconferencing, etc. should increasingly be part of Extension's portfolio of delivery modes.

Issues:

- a. To what extent and how can Extension work with libraries, community colleges, public or private television and radio, and other communication systems in achieving efficient and effective knowledge transfer?
- b. To what extent and how can Extension work with employers and utilize employment sites or employment rosters for effective knowledge transfer?
- c. To what extent are new technologies a solution to "serving broader audiences" and "doing more with less?" What is the potential role of automated information search and retrieval systems, or portals, both internally for staff and as a new service delivery technology for customers?
- d. As new technologies are used, in what instances do face-to-face delivery of programs remain appropriate?
- e. How can Extension staff remain competent and effectively use state-of-the-art delivery techniques?
- f. How can Extension nurture audiences accustomed to and preferring traditional delivery modes to explore, use, and make new delivery techniques not just cost-effective but also learning-effective?
- g. How can Extension reach those who are without the resources and expertise to use modern electronic knowledge transfer systems?

Commentary:

In the 21st century, the competitive edge for businesses and professionals--and to a certain extent for individuals in their personal lives--will be access to and assimilation of new information. Now and into the near future, there will be wide disparities within the population and in the workforce relative to access to and skills needed to use these technologies.

Also, the division among formal education, adult and continuing education, professional development, etc. is becoming less distinct than in the past. There is growing emphasis upon ability to accomplish tasks and not rely upon “credentialism” alone. In part, this is the result of a faster paced and changing society. And, in part, it is the result of new life patterns and preferences. Clearly, competition for time is a changing dynamic for people in their personal, professional, and business lives. As Extension strives to be more customer focused in subject matter; likewise, it must be customer focused in modes of delivery.

Theme 6. Internal actions and accountability

Iowa State University’s academic and research structures and operations should be fashioned to support Extension’s mission to address client needs and help them find solutions to problems. Also, ISU Extension must become more performance driven and less program-delivery driven. That is, accountability needs to emphasize outcomes, impacts, and results. Program and service delivery is the “means” not the “end.” To insure accountability, clear linkages need to be documented between programming activities and outcomes and impacts. According to their respective appointments, faculty should be supported and rewarded for the “scholarship of engagement” in ways commensurate to the “scholarship of learning” and the “scholarship of discovery.”

Issues:

- a. How can Extension achieve efficiency in providing services? Are there opportunities to re-align procedures, structures, or operations? For example, grant-seeking skills are important for today’s entrepreneurial organizations. Should this be an expectation of all staff, or should it be structured in some other way?
- b. To what extent are the skills for Extension work nurtured and mentored? Is this adequately provided, whether for faculty or for field staff? Is it incorporated in graduate programs or with new faculty?
- c. To what extent do academic departments require and reward faculty for integrating their subject matter across disciplines and collaborating with other units, including Extension? When collaboration occurs, is it more “multi-disciplinary” than “interdisciplinary?”
- d. To what extent do performance indicators for faculty and staff measure the scholarship of engagement? Are these clearly communicated and applied in performance evaluations?

Commentary:

Input from campus and field personnel included concerns about roles, functions, and relationships in the Extension system as well as the larger university. University structures, and to some extent Extension’s, are based on long standing traditions and patterns. To some, these patterns are interpreted as supporting and reifying the status quo rather than making effective use of finite resources. Budget reversions, increasing performance expectations, and perceived inequalities in rewards potentially have negative consequences for staff morale. For some, the solution to the issue is better communication. For others, there is a recognition that different interests, values, and priorities are at stake. The challenge is to make sure the organizational framework does not impede the motivation and performance of staff and that staff are valued and fairly rewarded in carrying out the goals of the organization.

Charge 4

Establish priorities for change based on the vision and roadmap

The six themes identified under Charge 3 reflect priorities of the committee. Below are nine action steps that are important and specific to addressing one or more of the six themes.

Action step 1. The vice provost for Extension should work collaboratively with the provost and president of ISU to develop a long-term strategy to enable ISU Extension to utilize all colleges and departments to provide services to Iowa and Iowans.

Action step 2.

A. Establish an ongoing assessment of client needs process that is fully open and forward looking. This process cannot be rooted in, nor should it altogether ignore, successes of existing programs or the interests of current clients, stakeholders, and staff. The concern is that existing processes too often reify the status quo with regard to existing programs and clients.

B. Once needs have been identified, they should be prioritized and resources acquired or reallocated to support the delivery of programs and services to meet those needs. The committee offers these criteria for determining priorities for programming:

- Where does the program rank in comparison with other identified needs?
- Is the program or service judged to have an impact on a priority issue for the state of Iowa?
- What is the priority of the program vis-a-vis the land-grant mission?
- Is funding or in-kind support available through a collaborative effort to deliver the program or service?

Action step 3. Establish a process to systematically review all ISU Extension programming and determine comparative worth on:

- Meeting goals of Extension's strategic plan.
- Meeting Iowa's priority goals.
- Alignment with sources of funding (public resources for public good versus private resources for private gain).
- Return on investment vis-a-vis outcomes and impacts.

This process should involve input from County Extension Councils, Iowa Association of County Extension Councils, clients, other stakeholders, and staff. The result of this process should provide more input and support for more multi-county, area, statewide, or multi-state programming.

Action step 4. In conjunction with County Extension Councils and the Iowa Association of County Extension Councils, develop alternative models for local county presence including identified physical space, local roles in program delivery and information dissemination. Explore the use of agreements for formal arrangements among councils and other organizations for space, staff roles, program delivery, information dissemination, and administration.

Action step 5. Develop and implement guidelines for branding ISU Extension services and activities. While the ISU nameplate needs to be respected and adaptable in these endeavors, ISU Extension must have its own recognizable identity as well. Resources need to be provided centrally and the system needs to assure that these efforts result in a consistent, professional, and visible identity statewide.

Action step 6. Expand a coordinated professional development program for staff to assure they are competent, state-of-the-art, 21st century Extension educators. Core competencies need to be established and benchmarked. Suggested competencies include skills in:

- Program development.
- Resource acquisition.
- Communication (oral, written and electronic).
- Inter-organizational collaboration and partnership building.
- Group process.
- Understanding the importance of education in controversial issues.
- Understanding change, including the impact of increasing diversity in society.
- Understanding scientific methodologies.

Action step 7.* Establish a coordinated mechanism to help clients and staff access research and information at ISU and other institutions. Suggested activities include:

- Deliver services electronically through the Internet or other media.
- Create an ISUE "Knowledge Management" Internet retrieval system that organizes information in a common, user-friendly format.
- Establish a call center available to clients for referrals or inquiries.
- Coordinate communications among campus, area, and local Extension personnel.
- Centralize support for grant development and other funding opportunities (RFPs) and assist local and regional offices, as appropriate.

Action step 8.* Establish an ISU Extension client information system. This system would allow ISU Extension to more easily identify and communicate with clients. Ideally, the system would be multi-program and system-wide.

Action step 9.* To effectively implement the action steps outlined above, ISU Extension should examine the current organizational structure and distribution of resources. This examination may result in alteration of both.

* There was consensus among the committee members for Action Steps 1-6, but less than full committee consensus for Action Steps 7, 8, and 9.

Acknowledgements

Members of the Futuring Committee acknowledge the support of others in helping it complete its tasks. First, individual members of the committee appreciate the confidence shown by Vice Provost Johnson in asking them to participate in this important assignment for Extension. Secondly, the committee appreciates his patience allowing the committee additional time to complete its work. Third, the committee benefited greatly from the Vice Provost providing expert and professional assistance from Enterprise MidAmerica in helping it pursue its work.

The committee is grateful to Phil Dunshee and Tori Squires, Enterprise MidAmerica, for their efficient efforts to mobilize the committee into a functioning group. They were instrumental in organizing, leading, and summarizing information gathered in the several listening sessions, and their timeliness in implementing these activities and in providing feedback to the committee (and to the public through the web site) greatly assisted the committee. Also, by probing assumptions and offering alternative perspectives they made special, significant, and substantive contributions.

To the more than 300 customers, staff and faculty who took time from their workplaces and personal lives to participate in the several listening sessions, the committee is particularly appreciative. You were heard. Just as Iowa and Iowans are becoming more diverse, we too heard divergent thoughts on the future of Iowa and ISU Extension. Although not every idea, vision, or plea is evident in the report, all input was necessary and valuable to the deliberations of the committee.

Appendix A

The Charge to the Futuring Committee

This is the centennial year for the concept of Extension. It was developed in Iowa, beginning in 1903, and is a defining aspect of the state universities and land-grant colleges. In this historic year, it is appropriate to assess our development and to chart a course for the future. A part of the success of Extension has been its capacity to change in relation to the needs of Iowans and the ways of better serving them. This Futuring Committee Report will provide guidance for the Extension of tomorrow in Iowa, and because of our national leadership, a view to the future for Extension in all of the state universities and land-grant colleges. What better timing for conducting this futuring exercise--in Iowa on our 100th Birthday.

ISUE has a long history of adapting to new information and other technologies, changes in the funding base, the growth and development of private and other public sector organizations involved in education and technical assistance and the evolving priorities of the Iowa citizens. Recently, many of these factors that impact the structure of Extension and the prudent use of the public investment in the Extension "system" have experienced accelerated change. Examples are the information delivery systems, funding, and the new concept of engagement and the changing goals of the land-grant system as reflected in the BOR and the ISU strategic plans.

There is a need for a general assessment, organizational vision that is consistent with the realities of the environment within which ISU operates and the broad parameters of a "roadmap" that can guide us to an organization of ISUE that is consistent with this vision. A benefit of this vision and the roadmap will be a consensus of our stakeholders on the general directions of change, and an improved capacity to serve Iowa. It will also serve to guide organizational changes that are made on a short-term basis and in response to shocks-like the current budget situation. We are changing and we need a comprehensive strategy to guide the related decisions, even if they occur in response to episodic events.

The charge to the Futuring Committee is to:

- Assess the environment in which ISUE operates and the major tendencies for change in this environment
- Develop a vision for the future of the organization that is consistent with the new environment and the mission of Extension
- Prepare a roadmap and guidelines for change that are consistent with the evolving environment, the vision and the mission of Extension
- Establish priorities for change based on the vision and roadmap

We have retained a firm to assist the Committee (Public Resources Services Corporation). This firm will support the Committee in developing ideas about Extension and what it is and can be from our faculty, staff and county extension council members as well as from our partners and clients. The plan is to have the Futuring Committee and the process of developing the vision and roadmap open and transparent, and with broad and systematically generated input from a cross-section of Iowa.

The Committee is appointed effective October 1, 2002. I am requesting a preliminary report by December 15, 2002. This report will be broadly discussed in a series of statewide meetings to be held between January 1 and March 31, 2003. By May of 2003, the report will be finalized and distributed to the Administration of ISU, the Board of Regents, and most important, the stakeholders and partners of ISUE.

Appendix B

Futuring Committee Members

Duane Acker, Committee Co-Chair

Citizen Advisory Council
Cass County

Steve Padgitt, Committee Co-Chair

ISU Extension Program Director, Communities
Story County

Don Ahrens

Extension Council Member
Mitchell County

Glen Mente

Past President, 4-H Foundation
Story County

Willem Bakker

Director, Iowa Manufacturing Extension
Partnership
Story County

Gene Mohling

County Extension Education Director
Johnson and Washington Counties

Lisa Berkland

Youth Field Staff
Emmet County

Margaret Mordan

Iowa Association of County Extension Councils
Monroe County

Darrell Busby

Agriculture Field Staff
Pottawattamie County

Fran Passmore

Families Field Staff
Allamakee County

Jon Cook

Communities Representative
Greene County

Brenda Schmitt

County Extension Education Director
Floyd County

Ruth DeVries

Extension Council Member
Polk County

Fred Sick

Iowa Association of County Extension Councils
Sioux County

Sherry Glenn

Associate Vice Provost for Extension
Story County

Vicki Sickels

Citizen Advisory Council
Ringgold County

Kim Greder

Families Campus Director
Story County

Peter Hong

Citizen Advisory Council
Pocahontas County

Jim Hughes

Citizen Advisory Council
Pottawattamie County

Appendix C
Materials Available on Internet Site
(<http://www.enterprisemidamerica.com/WebSite/default.html>)

A. Charge to the Futuring Committee

B. Background Resources

“Becoming the Best Extension Service. The Strategic Plan for 2001-2005: Pursuing Excellence by Connecting with Iowans.” Iowa State University Extension, December 2001.

“Final Report to ISU Extension Administration from the Steering Committee to Improve ISU Extension Operations.” May 9, 1984.

“The Extension System: A Vision for the 21st Century.” Extension Committee on Organization and Policy, February 2002.

“Future Directions: Continuing Excellence in Serving People.” Iowa State University Extension, November 1985.

“Iowa 2010: The New Face of Iowa.” Final Report of the Governor’s Strategic Planning Council. November 1, 2000.

C. Summary of Input from Area Listening Sessions

November 14, 2002 - New Hampton

November 15, 2002 - Prairie City

November 18, 2002 - Lewis

November 20, 2002 - Des Moines

November 19, 2002 - Iowa City

November 21, 2002 - Cherokee

December 2, 2002 – ISU Campus

D. E-mail Input

F. Web Site Feedback Page Input

G. Additional Input

H. Futuring Committee Meeting Summaries

November 7, 2002

December 4, 2002

December 19, 2002