The summit, held November 3-5, 2011, occurred at a pivotal time in the history of ISU Extension and Outreach. Since 2009, several profound changes had impacted the organization. Changes such as significant staff reductions due to the 2009 restructuring and a series of retirement incentive options; leadership changes within extension and the university; and budget cuts as seen in furloughs, limited pay increases, hiring freezes, and reduced presence in the counties impacted employees, partners, and clients. In addition, extension councils experienced changes associated with the 2009 restructuring in the form of additional responsibilities, including human resources, program promotion, local needs assessment, and fiscal and office management. Since late 2008, the domestic economic recession and severe flooding and storms had challenged ISU Extension and Outreach staff to respond in crucial ways to be a continual resource to Iowans, while managing their personal lives touched by these disastrous situations. While some changes had been assimilated, others continued to generate unresolved issues.

Cathann Kress, Vice President for ISU Extension and Outreach, commended the work of ISU Extension and Outreach, but identified the following issues as remaining unresolved. She said:

- **Ad hoc style of operating** — While it's important to be flexible, we also need processes in place that all of us can understand and follow, so everyone knows the parameters in which we operate. In an organization as complex as ours, systems must be transparent and understood, so everyone knows how to connect and influence the processes.

- **Extension and Outreach faculty and staff on campus and throughout the state seem unsure of the basic principles and values of the organization.** While variety across programs and locations is a good thing, and we don’t want “one size fits all,” we need to reaffirm our common core so we have one set of fundamental principles that guide decision-making at all levels.
PARTICIPANTS
A record number of participants — more than 500 Iowa State University and county staff, faculty, administrators, extension council members, and others from 89 counties and campus — attended the summit in Ames. All participants shared common interests in strengthening ISU Extension and Outreach to ensure it continues to add value to both the institution and the citizens of Iowa whom we serve.

OBJECTIVES
The Advance: 2011 Leadership Summit brought together those most knowledgeable about ISU Extension and Outreach issues and challenges — and the educational programs we support and provide to Iowans — to candidly discuss the fundamental principles that should guide our work, as well as areas of strength, opportunities for improvement, and priorities to guide future decision-making and partnerships. Vice President Kress defined ISU Extension and Outreach as a community-based educational organization, providing ongoing access to education because we are uniquely able to anticipate issues, act in catalytic ways, and stick around for the long haul.

The summit challenged participants to identify gaps in current processes and practices, and to develop action steps based on group consensus. The fundamental principles, actions, and priorities developed at the summit represented the collective vision about top priorities and what needed to be done to ensure that:

1. ISU Extension and Outreach educational programs will be relevant to the challenges Iowans face today, and
2. Our programs will be appropriately designed and resourced to produce meaningful, measurable outcomes.

ACTIVITIES AND PROCESSES
During this leadership summit, participants pursued big ideas. It was a time to focus on our mission and explore partnerships we could build, the learning opportunities we could create, and the structures that would be most efficient to best serve Iowans and our institution in the years ahead. Vice President Kress set the stage, outlining the summit’s three goals.

First: Define and agree upon the fundamental principles of ISU Extension and Outreach. To frame the discussion, Vice President Kress charged participants to think about the principles that guide decisions, behavior, and priorities in ISU Extension and Outreach. Facilitators led participants through focused small group conversations designed to identify how ISU Extension and Outreach operates today and to determine what fundamental principles the organization should use to guide decision making for the future. Each conversation group decided upon their top three fundamental principles to bring forward to the entire group. Then later in the day all participants voted to determine a set of agreed upon fundamental principles.

Second: Identify action items that align with the fundamental principles. Again working in facilitated small groups, participants identified action items that would advance the organization toward excellence. Each group prioritized a list of action items and provided a short description of the top priority. At the end of the day, all participants voted to identify a set of action items for the coming years.

Third: Prioritize the action plans to guide decisions for allocating resources. This third breakout session was conducted in work-related groups. Each group identified how it would support the agreed upon action items from the second session. Each group agreed on three top priorities to share during the final large group session. All participants collectively voted to determine the priorities that would guide decisions in ISU Extension and Outreach for allocating resources.

Before beginning the process, the summit participants received encouragement from Iowa State University Provost Elizabeth Hoffman and President Gregory Geoffroy. They also heard from four panelists — campus, field, and county staff and an extension council member — who reflected on what they perceived as working and not working within ISU Extension and Outreach. Their comments further prepared the summit participants for the task ahead.

Throughout the summit, additional panelists and keynote and capstone speakers offered insights in identifying the needs of Iowans, taking responsibility to create change, and ensuring that ISU Extension and Outreach would remain viable for years to come. Round table discussions offered updates on current educational programs, innovative partnerships, disaster response, and issues facing Iowa’s aging population as well as at-risk audiences. Vice President Kress closed the summit, noting that it was not the end, but the beginning.

“I’ve been to two previous annual meetings. This is the best one. I’m already liking this one. It’s like, let’s do something.”

“The summit marks the start of the new way we are going to do business in ISU Extension and Outreach. From now on, we are all going to be on the same page, working from the same blueprints, singing from the same choir book — choose your favorite analogy,” Kress said. “We have a lot of knowledge and best practices — and it would be good to have systems to share them. Think of the extraordinary capacity we would have if we could stand on each other’s shoulders.”
“The exciting part is that it’s occurring — and the engagement. We’re shaping our future. Even though we have an administration, we also have ownership. It’s personal.”

OUTCOMES
ISU Extension and Outreach builds partnerships and provides research-based learning opportunities to improve quality of life in Iowa. Not surprisingly, summit participants identified several consistent ideas as the fundamental principles that should guide our decision-making and provide the overall compass for our work.

• **Purpose**: ISU Extension and Outreach has as its core purpose to provide research-based educational programs.
• **Partnership**: ISU Extension and Outreach accomplishes its goals through the development of diverse and meaningful partnerships.
• **Impact**: Through our purpose, and in partnership, ISU Extension and Outreach provides relevant, needs-driven resources and as a result, creates significant impact in the state of Iowa.

Based on these fundamental principles, participants were challenged to identify what ISU Extension and Outreach should be doing in the next two to three years to thrive. In small, facilitated groups, participants identified numerous actions and later in the large group, they cast their votes to collectively determine the following top three action items:

• ISU Extension and Outreach will invest in meaningful partnerships.
• ISU Extension and Outreach will refine a system to collectively identify emerging and current needs.
• ISU Extension and Outreach will develop and support a structure to sustain professional development.

During the final breakout session participants were asked how they would support the agreed-upon action items. Their discussions focused on priorities that their individual work groups and teams were willing to carry out and that they believed should shape our collective action for the future. Four highly consistent priorities surfaced:

• We will invest in building and supporting meaningful partnerships that align with our mission.
• We will develop and support systems to improve internal communications, coordination, and collaboration.
• We will contribute appropriate people and tools for a system of needs assessment.
• We will develop a sustainable structure and culture to provide professional development for extension employees at every level, as well as county extension council members and volunteers.

The summit provided a platform for honest conversation about the current state of ISU Extension and Outreach. It also began an approach to change that is transparent and inclusive. By recording the current state of ISU Extension and Outreach, it also began an initiative focused on priorities that their individual work groups and teams were willing to carry out and that they believed should shape our collective vision for the future.

SUMMARY
The Advance: 2011 Leadership Summit provided a “one-of-a-kind” opportunity to come together and discuss how we in ISU Extension and Outreach, as a team, could “advance” toward excellence. Our work environment had changed, the economy had changed, our clients and partners had changed, our resources had changed, and our leadership had changed, creating an organization working in an ad hoc manner without a guiding plan for conducting business. The time was right to gather those most knowledgeable about ISU Extension and Outreach and have honest, open conversations.

During the summit we agreed upon the fundamental principles that would guide decision-making and provide the overall compass for our work. With a general consensus built around these principles, we then identified the appropriate actions that should be taken in the next three years to thrive as an organization.

Collectively, the fundamental principles, action items, and priorities that we agreed upon now serve as the basis for shaping our future. At all levels, our organization needs to review these priorities and consider how we refocus ourselves. An Administrative Response will be shared from the Vice President’s office, outlining actions that will be taken by administration in support of the summit plan.

No matter what any individual’s role is with ISU Extension and Outreach, we are asked to be one team with a common mission and common principles. We are all part of moving us forward. The decisions we make each day contribute to the success — or failure — of the organization. Together we can be a part of a meaningful endeavor — a relevant, vibrant organization, fully committed to anticipating issues, acting in catalytic ways, and supporting lowans over the long haul.

“This is all good conversation. But now I want administration to take it all and make it specific. Give us direction.”

Next Steps
The ISU Extension and Outreach Administrative Response to The Advance: 2011 Leadership Summit will follow, including

• plans for the organizational structure,
• a business plan, and
• a strategic plan in light of these results.