Extension Faculty Advisory Panel
for
Organizational Transformation

Report & Executive Summary

Submitted to

OSU Extension Service Director

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Executive Summary

Introduction
The current economic environment of reduced resources has required OSU Extension to reduce operating budgets by 15 percent. These cuts were made for the 2009-2011 biennium.

However, there remains the larger issue of an unsustainable funding model for OSU Extension that demands organizational transformation. If Extension is to continue as a strong presence in communities across the state, it must be resilient in its ability to weather future budget oscillations while being responsive to the state’s highest priority needs.

Process
In October, 2009, Extension Director Scott Reed appointed an Extension Faculty Advisory Panel to develop guidelines for transforming Extension to be more responsive and resilient. His vision for change focused on reduction, re-set, and recovery. Prior to this committee’s charge, the Extension Program Leaders reduced operating costs to reflect the current budget shortfall. The faculty advisory committee was appointed to address the “re-set” phase of change, positioning Extension for recovery and future growth.

The Faculty Panel was asked to develop options for the Extension Director to set a course for recovery. Our work grew from three white papers completed during the summer 2009 that addressed issues of regionalization, program integration, and market value of Extension projects.

From October 2009 through February 2010 the panel interacted with Extension faculty, staff, and stakeholders in surveys, workshops, discussion groups, and webinars. These interactions guided the faculty panel’s work and informed the options and concepts now being shared with the Director, who will use the panel’s work to make recommendations to the Provost’s Strategic Alignment/Budget Reduction Review Committee.

Recommendations
This report is organized into two main components: a menu of structural options and a set of functional elements addressing overarching issues. Within this suite of choices are ideas that will strengthen Extension’s capacity to be responsive, effective, and resilient. The panel recommends that the Extension Director use these ideas to frame transformational change within OSU Extension that will:

- maintain a local presence in each county, with programs that respond to local needs
- streamline administration to allow faculty and staff to work efficiently and effectively at all levels, with lines of reporting that reduce conflicting demands
- challenge our tenured and tenure-track faculty to lead innovative problem-solving teams
- build flexibility into position descriptions and hiring to respond to emerging new issues
- challenge programs to work together on issues that demand integration and partnerships within and beyond the university
• plan targets for successful completion of some projects in order to create opportunities for additional innovation
• provide new directions for Extension education at a reduced budget and with resiliency to face future budget oscillations
Report to the Director

Introduction
The current economic environment of reduced resources has required Extension to reduce operating budgets by 15 percent. These cuts were made for the 2009-2011 biennium.

However, there remains the larger issue of an unsustainable funding model for OSU Extension that demands organizational transformation. If Extension is to continue as a strong presence in communities across the state, it must be resilient in its ability to weather future budget oscillations while being responsive to the state’s highest priority needs.

This transformation is part of an ongoing evolution that began with the establishment of the OSU Extension Service in 1911, with a mission to apply University expertise toward solving problems in communities across the state. Since that time, the focus of Extension has grown and diversified, just as the population of Oregon has grown and diversified. As OSU Extension transforms, the land-grant mission provides the compass for new public education, outreach, and engagement to meet the challenges of the 21st century.

Today, OSU Extension has faculty working in every county across the state. Programs address agriculture, youth development, forestry, natural resources, and family and community health. People may recognize Extension through the accomplishments of 4H, the contributions of Master Gardeners, or the research-based information people use to improve the ways they live and work. In each case, people see a small part of a large, complex organization.

The mandate for transformation across the university comes from President Ed Ray. However, it is the critical issues facing Oregon that motivates OSU Extension leadership to create a new way of doing business.

Process
In October, 2009, Extension Director Scott Reed revealed three phase plan that would transform the organization to be more responsive and resilient.

- **Reduction** would bring Extension’s expenditures in line with resources. Program leaders were directed to make the necessary budget adjustments to address an approximate 15% gap in state funding.

- **Reset** would be the primary charge of the a Faculty Advisory Panel for Organizational Transformation. The panel was directed to engage stakeholders and to develop and test a range of structural and administrative options that would position Extension to best serve Oregon and provide a resilient, responsive, and sustainable organization. These options, and the Panel’s analysis of their implications, would inform the decisions of the decisions of the Director and his Cabinet.

- **Recovery** would build from a rejuvenated foundation to meet Oregonian’s needs in the 21st century, and would be the responsibility of all Extension faculty and staff.
The Faculty Panel’s work grew from three white papers completed during the 2009 that addressed issues of regionalization, program integration, and market value of Extension projects. The panel held initial discussion sessions with staff chairs, program leaders, members of the Extension Community Advisory Network and the Metro Extension Community Advisory Network, and with a subgroup of county commissioners and judges arranged through the Association of Oregon Counties. A detailed online survey of faculty members was conducted, and an Extension Staff Panel assembled. Based on this extensive input, three initial structural options were shared with faculty and staff, along with some initial thoughts about marketing, technology and revenue generation, via a webinar in late January. This was followed by a series of in-person “roundtable” discussion opportunities held throughout the state, and by additional conversations with staff chairs, county commissioners and judges, program leaders, and department heads. Faculty and staff were given additional opportunities to interact via bimonthly conference calls, and many staff chairs provided feedback from their advisory councils.

Based on these interactions, Director Reed identified 10 goals for a transformed Extension, goals that recognize the strength of the organization and opportunities for improvement:

- Value and retain powerful community connections.
- Improve administrative efficiency and role clarity for administrators and faculty.
- Simplify and reduce complexities in organizational processes.
- Accomplish better integration across programs and missions.
- Balance our attention to rural and urban populations.
- Systematically identify Extension needs within counties and across the State.
- Grow extramural funds and partnerships within and outside the university to stretch limited appropriated funds.
- Emphasize our distinctive mission to develop cutting edge educational programs while seeking more efficiencies in the service component of our mission.
- Reach new audiences with research-based responses to contemporary issues.
- Optimize our unique position as an organization that spans the entire university.

These interactions and suggestions guided the faculty panel’s work and informed the options and concepts now being shared with the Director, who will use the committee’s work to make recommendations to the Provost’s Strategic Alignment/Budget Reduction Review Committee.

Current Structure
OSU Extension has worked with the current organizational structure since 1995, when Extension faculty members integrated into departments and units within colleges. During this same time period two different funding models have distributed state and federal resources to colleges for conducting Extension programs.

The first model allocated resources to colleges based on an approved staffing plan and required all freed resources to be returned, as made available, to the Extension director for redistribution. The second and current model allocates resources to colleges based on an approved biennial plan of work, with the resources managed by the college for the approved plan of work.
Regardless of the funding model in place, the current organizational structure is heavily reliant on what has proven to be unstable state funding. An over-dependence on state funding makes it difficult to provide a strong and consistent educational commitment to Oregon as well as to respond to expanding or changing needs. It is imperative that an organizational structure and supportive business model be adopted that provides both a reliable source of core funding to address priority needs and a consistent stream of funding for innovation and emerging issues.

The current organizational structure has both strengths and limitations. While many faculty members thrive in an academic unit environment, others find the multiple and sometimes conflicting demands of providing quality program delivery; coordinating volunteers and responding to clientele; launching and maintaining partnerships and collaborative relationships; responding to staff chairs, program leaders and department heads requests; and meeting promotion and tenure expectations overwhelming.

Even though the current structure has been in place for about 15 years there remains confusion about roles, responsibilities and supervision. The confusion breeds inefficiencies and creates redundancies. There’s the perception of too great a distance between program implementation and decision making authority. Any new organizational structure must address these concerns.

It is without question that Extension faculty and staff have a strong commitment to existing, or sometimes defined as traditional, audiences. This commitment may make it difficult to shift resources to emerging issues or to audiences not currently well served by Extension. A future organizational structure must provide the capacity and ability to be more responsive to emerging needs and new audiences.

The current structure relies on strong staff chairs, who have divergent areas of interests because of a joint program assignment. Staff chairs have varying skills as administrators and the expectations for program may reduce their interest or ability to focus on enhancing their administrative skill set. Staff chairs are “stretched” by the need to maintain relationships, teach, produce scholarship, manage volunteers, and secure funding for their programs and their faculty and staff’s programs as well as provide administrative leadership for a team of faculty and staff. County-based faculty members are also stretched by many of the same demands.

While there are excellent examples of faculty members cooperating across county lines and around the state for program development, delivery and evaluation, there is limited formal collaboration among counties for addressing priority needs and issues in a planned, comprehensive, and consistent manner.

The current organizational structure does not provide enough staffing resilience to meet the expanding needs. New funding sources, a more flexible staffing model, greater program integration and improved operations efficiencies are needed if OSU Extension is to continue its leadership in creating positive impacts for Oregon. These are the issues addressed in this report.
Options for organizational transformation

This document is organized into two main components: a menu (or matrix) of structural options and a set of functional elements addressing overarching issues.

The first part of this report outlines a broad menu of choices for structuring Extension, from county level to statewide organizational frameworks. Included are two examples that illustrate two, of many, ways in which the structural options might be combined to address organizational priorities.

Since the stated commission of the Faculty Panel was to present options, the section on structural approaches describes and analyzes a broad array of potential approaches without specifically recommending any one approach. We presented three sets of options to faculty and staff in late January and early February, and used the substantial feedback from those conversations to craft the expanded menu of structural approaches that appears herein.

The second part of the report examines several functional elements that reflect priorities and concerns that the committee heard in several listening sessions with staff, faculty, and stakeholders from across the state. Recommendations in each case are drawn from recurring themes among the hundreds of responses that we received during these interactions.

This section attempts to capture the essence of the major issues we face in our reorganization process, and to make recommendations we believe are in keeping with the mission of a Land Grant university and with OSU Extension Service in particular, and reflect concerns voiced throughout our organization.

These functional elements are:

- Local Presence and Responsibility
- Local Administration and Supervision of Faculty
- Local Support for County-based Faculty
- Innovation
- Integration
- Collaboration Among Statewide Public Service Programs
- Flexibility in Faculty Staffing
- Tenure, Rank and Academic Home
- Communication and Learning Technology
- Marketing and Brand Identity
- Budget Allocation and Accountability
- Revenue Generation
Menu of structural options

The first part of this report outlines a broad menu of choices for structuring Extension, from county level to statewide organizational frameworks. It presents multiple options (typically six) for each “level” of Extension’s organization, followed by our analysis of the major implications for each should it be adopted. The Director may choose an option at each level, or may choose to draw elements from multiple options at any particular “level” to create alternative approaches. It is not intended to imply that any one course (e.g., all A’s) must be accepted to form an overall organizational structure, but rather the options or even their individual elements should be combined to provide the most effective structure given the Director’s priorities.

Two examples that illustrate two, of many, ways in which the structural options might be combined to address organizational priorities, appear following the menu. They were selected to demonstrate how the options could be assembled to achieve divergent sets of goals, and should not be interpreted as recommendations from the Faculty Panel.

We strongly encourage the Director to consider the following when developing or refining Extension's structural model:

- Does it maintain or enhance local connections
- Does it maintain or enhance access to our programs and services
- Does it maintain or enhance partnerships
- Does it allow us to offer relevant products and services
- Does it facilitate access to a breadth of knowledge that leads to practical application
- Does it facilitate depth of knowledge (i.e., specialization)
- Does it facilitate collaboration with campus-based experts in colleges and divisions
- Does it facilitate trans/interdisciplinary collaboration (locally, regionally and/or statewide)
- Does it position Extension for success in recruitment of extramural funds
- Does it position Extension to recruit and retain top quality faculty
- Does it position faculty to be successful in their positions
- Does it reward faculty for success, innovation and responsible risk-taking
- Does it reduce dependence on state funds
- Is it robust to fluctuations in state and federal funds
- Does it demonstrate accountability to funding sources, elected officials, stakeholders, public, etc.
- Does it offer a logical pathway to transition from our current structure to the new structure
- Does it enhance efficiency and effectiveness of systems (business, reporting, performance management, etc)

These criteria may not all be achievable in any one organizational structure (there may well be trade-offs), but they reflect the recurring feedback from stakeholders about things that position Extension for success.

Menu of Structural Options can be found at: [http://extension.oregonstate.edu/internal/organizational-transformation](http://extension.oregonstate.edu/internal/organizational-transformation)
Structural Examples
Two examples are offered below to demonstrate how the menu of structural options could be used to assemble a coherent system of program delivery and organizational management. The first example draws directly from the stated options, and if it or a similar approach to reorganization were to be adopted it could be characterized as, essentially, refinements to our existing structure. The second example uses a more item-by-item approach to create a system that could accommodate a significantly smaller organizational footprint that may be in order should additional funding reductions be required. Since the menu is necessarily brief in its descriptions, detail is added in the example to demonstrate how individual pieces might be adopted or applied to accomplish organizational objectives. We conclude each example with a brief discussion of how the structure might meet (or fail to meet) the Provost’s guidelines for strategic alignment and budget reduction.

Please note that these are examples only, and should not be interpreted as recommendations from the Faculty Panel.

Example 1: (Current structure with refinements)
County-level Faculty Option A. Commit to a minimum of two state/federal funded faculty positions in each county willing to provide adequate support S&S to reasonably assure success of the positions. Retain or add other positions as needed to address the program priorities of the county. Clarify that each faculty member has a broad role to play within their county, and that they contribute in a more specialized role in neighboring counties. Commit to tenure/tenure-track to the extent possible in these “core” positions, and maintain linkages to academic homes while clarifying roles and expectations. Note that this staffing arrangement could, and arguably should, begin with our current staffing arrangement in county offices and make refinement as open positions are refilled or new positions created.

Area-level Faculty Option D. Organize and convene programming teams, consisting of county- and campus-based faculty members to address issues that span multiple counties or require involvement of multiple program areas. Invest in technology infrastructure and training to allow faculty members to make more effective use of blended delivery options, while maintaining our effective collaborations, partnerships and local connections.

State-level Faculty Option C. Locate subject matter experts (“specialists”) where they can be most effective, but ensure their environment is conducive to success. They will require not only adequate staff support and travel/support funds, but must have access to peers who can collaborate on research, scholarship and academic issues. Clarify their roles as links between county/area issues and the resources of the university, in the capacity of bringing resources and expertise to bear on county/area needs and in identifying opportunities for campus based non-Extension peers to engage in effective outreach. Strongly encourage or require them to play leadership roles in development of curricula that can be implemented throughout the state, in writing and managing grants that address needs at all levels of their program area, in mentoring new faculty, etc. Note again that choosing this option does not necessitate wholesale movement of “specialists” from their existing locations – rather it encourages careful consideration of location when opportunities to revise or refill existing positions arise or new positions are created. Option D, which suggests that in some cases obtaining specialist support from other
universities may be an efficient mechanism to support our Oregon Extension efforts, could be considered as a way to bolster our capacity (but is not intended to imply any dramatic shift to this mechanism).

County/Area Admin Option D. Use our existing system of county-based Staff Chairs to provide leadership for county Extension offices and the faculty members stationed in them. Continue to have them report to a Regional Director. Take advantage of opportunities to create multi-county administrator positions where feasible, but limit areas to 2 or 3 counties. This may not result in persons with entirely administrative positions, but it will allow those persons within our organization who have demonstrated a capacity for, and desire to perform, administrative functions an opportunity to increasingly specialize in these roles. Option D suggests that programmatic aspects of county-based faculty be supervised by Program Leaders, but that may or may not prove feasible and it would result in dual administration of each position. Since this option retains Staff Chairs, the supervisor functions would be best maintained in the staff chairs, but a more proactive and collaborative role with Program Leaders may be in order.

Program Leadership Option F. Retain our existing system of Program Leaders for 4-H, FCH, Forestry, Agriculture, and Sea Grant – and set a goal of establishing new program areas in other colleges as resources and opportunities become available. Challenge Program Leaders to engage their faculty members in a more collaborative and teemed approach to program development, research, etc. Maintain Program Leaders’ linkages to colleges, but hold them to high expectations for successful use of Extension funds, as articulated in biennial plans of work. Expect Program Leaders to lead/organize annual planning processes that engender teamwork and focus efforts on high priority needs. Ask Program Leaders to actively seek out opportunities for, and facilitate, greater collaboration among Extension and non-Extension faculty within their colleges, and to collaborate with each other to identify opportunities for multidisciplinary work.

Extension Administrative Option B. Retain a system of Regional Directors, Associate Director, and Director/VP O&E. (Note that the statement about having Program Leaders report to the Director would be inconsistent with the previous section that has them continue to report to their college Dean. The option could be modified to emphasize the Director’s role in evaluating success of each program area in meeting their plan of work commitments, rather than requiring direct supervision.) The model could be further modified to have regional directors report to the Director, rather than the Associate Director, if deemed necessary to comply with the Provost’s guideline on levels of management.

Alignment with Provost’s Guidelines. The model reflects the 15% reduction in state funding already implemented by Program Leaders, and provides a system for reallocating resources and making best use of remaining faculty members should further reductions be necessitated. It does not reduce our overall administration budget beyond the current levels of cuts, nor does it readily enhance our organization’s ability to “scale” itself in response to further budget cuts. It offers effective span of control and is reflective of the geographically dispersed nature of our organization and our emphasis on maintaining long-term relationships with the people we serve. It retains five layers of management (Staff Chair, Regional Director, Associate Director, Director, Provost/President), while offering an opportunity to meet the guideline of four levels of management by having Regional Directors report to the Director. Some Staff Chairs and the Director and/or Associate Director may not meet the guideline for a minimum of six direct
reports per administrator, but again this may be defensible given the nature of our organization. The model identifies many areas of enhanced collaboration and effectiveness, and adds clarity to faculty and administrative roles. It would have minimal implementation costs, and was based on extensive stakeholder involvement. Since the model refines, but does not propose radical changes to, our existing structure, it can be anticipated to have broad (although not complete) support.

**Organizational Chart for Example 1**

![Organizational Chart]

**Example 2: (Dramatically streamlined structure consistent with significant budget reductions)**

County-level Faculty Option C. Commit to at least one faculty member per county office, with additional county-based faculty members determined by needs identified at local and area levels. County faculty members have relatively broad focuses, as best suited to the county. They have fixed term appointments with no academic home, and have their contract length tied to performance. They are responsible for program development and delivery, volunteer management, needs assessment, local relationships and assessment of behavior change. Since the assumption of this model is that faculty numbers are significantly lower than our current status, the jobs of these individuals would not necessarily line up with existing positions. Positions would need to focus on a subset of the county’s highest priority needs, and emphasize a team approach with area-based faculty who would hold more distinct content area expertise.

Area-level Faculty Option C. Area faculty would be located in counties but have assignments to serve needs in multiple counties within their area of expertise. They would hold fixed-term positions, with contract length tied to performance. The option indicates no academic home, but they would need some mechanism to interface effectively with the research and information developed by departments and colleges, so the issue of academic home may need to be revisited. These faculty members would be expected to be highly responsive to needs identified by county faculty, and to make effective use of technology. They would engage in curriculum development,
program development and delivery, impact evaluation, and applied research. Their levels of scholarship would vary, depending on the intent of the position.

State-level Faculty Options B & D. Specialists would be moved primarily to Extension offices or regional Extension hubs to bring them closer to their clientele. Their roles may be intermingled with those of area faculty. They would retain tenure/tenure-track positions and academic homes, and be expected to have higher levels of scholarship, to engage in applied research and curriculum development, to produce significant Extension publications, and to assume leadership for statewide issues.

County/Area Administrative Option E (with elements of B and C). Area administrators would provide leadership for multiple county offices and the faculty and staff located within them. They would rely on a local faculty member in each county office to help maintain important local relationships. While the option did not specify an exact number, if this model is being assembled to address dramatic reductions in staffing it would make sense to have a reduced administrative group. Six area administrators, each covering about 6 counties, might be assumed to be the smallest functional number. This would require county and area faculty members to assume some elements of local administration (such as interaction with commissioners and supervision of staff).

Program Leader Option C. Consolidate existing program areas around three themes: agriculture, natural resources, youth and families. (Under a scenario of significant reductions, creating a program around business and engineering would likely be infeasible.) Make Program Leaders the immediate supervisor of faculty members with statewide appointments (to accommodate the fact that they would now be much more dispersed around the state). Task them with interdisciplinary collaboration, creation of staffing plans, response to issues, preparation and implementation of plans of work.

Extension Administrative Option E. Retain a Director/VP O&E and an Associate Director. Reconsider the functions associated with Regional Directors, Director of Special Initiatives, Evaluation Specialist, and County Operations Director – and consolidate these into about three individuals who would work as a team to address priority issues of the organization, with a strong emphasis on support.

Alignment with Provost’s Guidelines. The model assumes a dramatic reduction in staffing is necessary to address budget reductions, and that wholesale transformation is required to redirect remaining resources to a smaller subset of issues. It reduces overall administration by approximately 50%, and structures the organization to easily “scale” itself in response to further budget cuts. It clarifies roles of faculty members at differing levels of operation to facilitate more effective teamwork, and to maintain local relationships to the maximum extent feasible. There would be no gentle move from our current structure to that described in this example – it would most likely require declaration of financial exigency and a bottom-to-top rebuild of our organization. Many faculty members would be displaced, and very few tenure/tenure-track positions would remain. There would be negative implications for our connections with departments, for integration among the university’s three missions (teaching, research and outreach), and for our ability to maintain viable connections locally. Span of control would be stretched for Area Administrators (but given a reduced organizational footprint it might be
manageable). It trims us to four layers of management (Area Administrator, Associate Director, Director, Provost/President), and all but the Director would meet the guideline for a minimum of six direct reports per administrator. The model may have significant implementation challenges, since it would involve layoffs and radical change, and it would be highly unlikely to receive broad support from our current faculty, staff, administrators or other stakeholders.

**Organizational Chart for Example 2**

These examples illustrate two, of many, ways in which the structural options might be combined to address organizational priorities. We remind the reader that they are offered as examples only, not as specific recommendations.
**Functional elements and recommendations**

The second part of this report examines several functional elements that reflect priorities and concerns that the committee heard in listening sessions with staff, faculty, and stakeholders from across the state. Recommendations in each case are drawn from the hundreds of responses that we received during these interactions.

These functional elements are:

- Local presence and responsibility
- Local administration and supervision of faculty
- Local support for county-based faculty
- Innovation
- Integration
- Collaboration among Statewide Public Service Programs
- Flexibility in faculty staffing
- Tenure, rank and academic home
- Communication and learning technology
- Marketing and brand identity
- Budget allocation and accountability
- Revenue generation
Local presence and responsibility

Situation:
Local connections and long-term community relationships are central to OSU Extension Service and the land grant mission of Oregon State University. Communities are defined by both shared geography and shared interests. Extension must have the capacity and ability to respond to ongoing and emerging needs of communities at all levels.

Recommendation 1:
Clearly define community needs and emerging issues in planning relevant programs for local stakeholders and clientele.
- Conduct ongoing county and/or regional needs analyses.
- Use existing peer-reviewed tools and best practices for needs analysis to ensure reliable data; completed analyses should be peer reviewed
- Apply these analyses to develop relevant programs that match local needs

Recommendation 2:
Adopt planning and reporting tools that allow Extension to respond efficiently to current and emerging needs at local, regional and statewide levels.
- Create guidelines to ensure that local needs are reported to higher levels of Extension so local data are equitably considered in system-wide planning and staffing.
- Institute method to streamline reporting of collaborative (team) projects.
- Expect collaboration across programs within local communities and collaboration across communities in annual planning processes to encourage teamwork and responsiveness to needs.

Recommendation 3:
Create flexibility in position descriptions and assignments in order to use the experience and expertise of faculty most efficiently in addressing identified needs and emerging issues.
- Strategically locate faculty to address community needs.
- Create flexible faculty position descriptions in order to respond to changing needs and changing emphases of programs. Regularly assess and revise as needed.
- Articulate expectation that, as faculty progress through professorial ranks, they will assume increasing responsibility for peer mentoring, grant opportunity identification and leadership, team leadership, issue leadership and impact assessment. Modify position descriptions progressively to reflect these expectations.

Recommendation 4:
Diversify Extension faculty to represent many different audiences, cultures, learning styles, and points of view.
- Use the opportunity of retiring senior faculty to build more diversity into the face of Extension
- Reward the work of teams that bring together multiple communities in non-traditional collaborations (such as urban+rural; old+young; etc)

Impacts:
Extension education based on ongoing needs analysis will ensure that Extension invests faculty time and resources strategically to address local needs and meet clearly defined expectations.

Matching relevant expertise with community needs and developing tools that build flexibility into position descriptions will ensure Extension can efficiently address local needs and emerging issues.

Extension will be prepared to address current and emerging local, regional and state level needs while efficiently leveraging faculty expertise and other resources.

Consequences:
Without clearly identifying and understanding local needs and issues Extension will be unable to adequately serve stakeholders and clientele.

Without adequate reporting tools, higher levels of extension may not be informed of existing or emerging needs and thus be unable to respond accordingly.

Timeline:
Needs assessments ongoing, begin within 3 months where needs analysis have not been conducted. Planning and reporting guidelines should be in place by August 2010.
Local administration and supervision of Faculty

Situation:
The Oregon State University Extension organization is a complex system of relationships, expectations, partnerships, and funding mechanisms. The implementation of any one administrative model would fail to recognize the divergent array of local funding streams, geography, and our established relationships and partnerships.

Recommendation:
The administrative model used at the county or area level needs to allow flexibility, and areas administered must be reasonable in size to ensure connections are maintained and faculty are adequately supported and supervised.

- Clarify reporting lines. Have each faculty member report to a single supervisor whenever feasible, or identify a primary supervisor.

- Continue to support a county staff chair position, with dual responsibilities for local administration and programming, while exploring opportunities for multi-county or area models where feasible and where increases in efficiency and effectiveness are anticipated.

- Ensure that people filling Extension administrative positions (staff chairs, regional directors, etc.) possess administrative and leadership skills that reflect their duties. Provide them with professional development to ensure quality administration.

- Streamline accountability for staff chairs by using an automated, online, 360-degree evaluation process to seek input from all faculty they supervise as well as from county commissioners, advisory council members, and relevant stakeholders.

Consequences: Multiple supervisors and/or a lack of clarity in lines of reporting leads to confusion in roles and feelings of dissatisfaction and disconnection.

Impact: Keeping a staff chair at a local or multi-county level maintains the connection between Extension Service and the local county commissioners, county departments, and other local partnerships and funding partners. Opportunistic evolution of area administrative systems will allow Extension to consolidate these functions and potentially achieve economies of scale, but must be done with caution.

Timeline: Improve systems not in line with these recommendations within the next year. Creation of area administrative positions would happen over time, as opportunities present themselves.
Local support for county-based faculty

Situation:
Extension currently requires $50,000 in county funds for S&S in hosting an individual faculty member at a county Extension office. This amount is based on the statewide average cost of hosting a faculty member at the county level, but it fails to acknowledge the different levels of support needed for various programs.

For example, faculty members that oversee large volunteer groups or are engaged in significant program management activities (such as 4-H and Community Horticulture/Master Gardeners) may require a higher level of staff support than would a faculty member serving a more targeted, commodity-oriented audience (e.g., forestry or livestock). This mechanism potentially under-supports some positions while requiring unnecessarily high level of support for other positions.

Recommendation 1:
Revise county contributions based on the type of support needed, rather than assigning a specific dollar value.

- For most county-based faculty, a host county should provide office space, approximately 1/3 of a secretary, computer, network connection and support, local travel funds, professional development funds for 1 or 2 events per year, and sufficient supplies and services funds to support the work of the faculty member within that county.
- A higher level of local staff support must be available to support 4-H or other management-intensive positions.
- Other counties served by the faculty member (in an area or multi-county capacity) should provide travel funds and secretarial support for the activities conducted there, funds for mailings and materials used by that county’s residents, shared office space and network access, assistance with volunteer management (if applicable), assistance with promotion and marketing, and assistance maintaining local connections with producer groups (if the faculty member serves a large area).
- The levels of support for area/multi-county faculty members should be clearly defined and agreed upon by the staff chairs/area administrators whose counties will be served, with input and oversight from Extension Administration as needed, with the intent of assuring these faculty members have the support needed to allow them to be effective.

Impacts/Consequences:
Our current guideline for county-based support over-estimates requirements for some positions while underestimating it for others, and it fails to uniformly support area/multi-county faculty members. Adoption of the revised policy would provide a more appropriate level of support for county-based faculty positions in general. It would be more difficult to convey to county officials, but is more defensible since it recognizes differences in cost among locations and position types. It would require a higher level of discussion among some counties/administrators, but would address recurring issues that would otherwise remain barriers to effective use of area faculty.

Timeline:
The Extension Cabinet (or its designee) could review and refine the support requirements over the next few months, and implement the new policy/guideline at the beginning of FY11 (July 1, 2010).
Innovation

Situation:
Extension faculty have developed some highly innovative approaches in places throughout the state. But many of these innovations are neither well known nor embraced by other faculty or at other sites or levels of the organization. Time constraints, heavy workloads and comfort with traditional approaches create barriers to innovative thinking.

Recommendation 1:
Relentlessly identify innovative ideas and create opportunities for more innovation.
- Reach across counties, programs, colleges, and communities to create new partnerships and never-before-considered collaborations
- Actively engage non-Extension University faculty in cross-disciplinary projects that offer new ways of examining issues
- Respond to emerging issues and audiences using fresh ideas, new technologies and unswerving attention to solving problems through partnerships
- Actively seek innovative actions that have a recognizable impact and expand the ‘reach’ of the organization

Recommendation 2:
Recognize that innovation requires prioritization and investment.
- Catalyze innovation through a targeted pool of funds awarded to issue-based teams to address emerging issues and audiences. The fund would initially reserve 5% of Extension’s budget and increase over the next decade; funds would be allocated using a competitive process with attention to innovative investments that leverage additional revenue
- Assure programs and approaches that are no longer viable are annually reviewed using a set of pre-established criteria and are discontinued or eliminated as needed.
- Assure any viable products generated through innovative efforts are integrated into Extension’s’ business plan, spun-off as a self-sustaining element within the overall organization or sold and become a part of revenue over time.
- Hold teams accountable for completing work in a pre-identified time period.
- Integrate innovative thinking into administrative oversight and task administrators with simplifying organizational processes that are perceived as creating barriers to innovation

Recommendation 3:
Recognize and reward teamwork as a highly-valued element in achieving innovation
- Assure that faculty and staff are affirmed and rewarded for identifying ways to implement programs innovatively
- Assure the activities of teams are relevant and mission-specific
- Assure issue-based teams carry ownership for the work they do and are held accountable for process and product; teams are given 2-3 years to implement an idea, engage communities of interest and generate on-going support.
- Assure innovative thinking and actions are communicated on an on-going basis through the “Impact” section in SOARS.
- Establish an annual ‘Director’s Award’ with financial compensation to teams that successfully complete an innovative, high-impact project.
• Infuse innovative thinking and herald teamed efforts in communication that goes out to the organization.
• Pay increased attention to profiling effective new approaches in legislative communications and celebrate them in the media

**Consequences:** Without constant attention to innovation, Extension programs run the risk of being considered outdated or “old-school.” If this happens, Extension representatives and expertise is less likely to be offered a seat at the table when difficult community or University challenges require “out-of-the-box” thinking.

**Impact:** Catalyzing and rewarding innovative thinking relevant to public need and perception of need injects new vigor into the organization and encourages a more positive “let’s make it happen” organizational mindset. Innovation and resulting products offer enormous potential to generate additional revenue streams.

**Timeline:** Immediate and on-going; establish any needed framework for the processes outlined above over the next six months.
Integration
Situation:
Extension has a 100-year history of serving Oregonians but will need to actively demonstrate more effective collaborative and cross-disciplinary approaches in order to weather current revenue challenges and address the complexity of 21st century issues. The on-going success of OSU Extension may be dependent on integration across programs and disciplines as well as increased use of teams and team-based problem-solving. Teams exist, but often on a very limited scale and are not fully and broadly instilled in policy and practice.

Recommendation 1:
Maximize cross-disciplinary collaboration within colleges, throughout the university and at all levels of the organization.

• Assure the voice of land grant “mission accomplished” is irresistible--and well integrated into University and community successes
• Instill teamed behavior as a valued component of Extension’s mission, policy and practice
• Assure non Extension faculty within the university recognize and value Extension’s’ role in strengthening outreach and improving the likelihood of developing strong community partnerships
• Evaluate and reward performance that uses teams to:
  1) jump-start response to an emerging an issue
  2) manage a large high-priority project
  3) address a geographic or demographic need
  4) catalyze community action
  5) inform the public and decision-makers about a current public issue (See also ‘Innovation’)
• Organize partnerships and collaborations informally to enhance day-to-day activities in county offices or through formally negotiated memorandums of understanding that may be county-wide or statewide

Recommendation 2:
Design a cross-program annual planning process that informs needs and resource allocations

• Mirror O & E’s intention to ‘scale up’ integration with other colleges and within university systems
• Modify position descriptions to reflect an expectation for cross-disciplinary teamwork that is responsive to identified community needs
• Assure teamed approaches are reflected in individual plans of work
• Assure research partnerships are tightly threaded into Extension program activities
• Assure grant applications recognize the value of Extension as a ‘field-based laboratory’ and Extension roles are delineated in the application itself
• Assure reporting metrics are adapted to allow easy documentation of teamed approaches
• Recognize the opportunities to gain efficiencies with collaboration among OSU Statewides (See also “Collaboration Among Statewide Programs”)

Consequences: Without a more aggressive, multi-disciplinary, cross-program approach that reaches through all levels of the university and deeply into the community, Extension programs cannot be quickly responsive to emerging issues and may ultimately not be considered value-added or viable
contributors. Cross programs opportunities will go unrecognized or be lost and projected budget shortfalls are far more likely to require major organizational retro-fitting.

**Impact:** Collaborative approaches generate allegiances and lay positive groundwork for new audiences and new revenue streams.
Collaboration among Statewide Public Service Programs

Situation:
The existence of significant opportunities to gain efficiencies through collaboration among OSU’s three Statewide Public Service Programs: the Extension Service, Agricultural Experiment Station (Branch Experiment Stations), and Forest Research Lab. Collaboration already occurs in some locations where facilities, support staff, or administration are shared between a county Extension team and a Branch Experiment Station. Collaboration occurs in several academic departments, where Extension, research, and teaching FTE interweave through the faculty and parts of all three missions can reside in a single individual’s position description.

Through collaboration, the statewide programs can gain efficiencies and strengthen the interconnectedness of the three-pronged mission of Oregon’s land-grant university. Such collaboration allows Extension to respond effectively to stakeholders’ needs and to demonstrate added value to legislators and decision-makers.

Recommendation:
Form a “Think Tank” to evaluate potential opportunities for collaboration at locations across the state.

- Identify collaborators to engage meaningful conversations among faculty and stakeholders
- Identify opportunities based on assessed needs at the local, state, and regional level
- Assess choices based on common marketing, technologies, and stakeholder groups and potential funding, programmatic, and administrative efficiencies
- Identify opportunities for research-and-extension team approaches to meeting ongoing and emerging needs.

Consequences/Impacts:
Models and examples currently exist at several locations across the state, and beyond. Different opportunities for collaboration may arise at different locations, which may lead to different implementation in different areas.

As teams evolve, subject expertise, funding opportunities, and capacity to address emerging issues are readily achievable. Collaborations among research and Extension could:

- Serve as the catalyst to bridge programs, departments, colleges, divisions, OUS colleagues, and outside partners in government and industry.
- Enhance legislative support for the Statewide Public Service Programs.
- Take advantage of coordinated expertise for securing outside funds
- Share technology adaptation and marketing programs

Timeline:
As Transformational Plans are being drafted for the other statewide programs, the opportunity is at hand to plan collaborations, co-location, and implementation over the next six months.
Flexibility in faculty staffing

Situation:
OSU Extension Service faces diminishing state funding and a concurrent need to meet changing needs. Both of these situations suggest that our organization will face difficult choices about how to allocate resources. Our current system places responsibility for staffing decisions at the Program level, and while presumably offering biennial opportunities for the Director to re-allocate resources among program areas, our organization’s emphasis on tenure/tenure-tenure track positions significantly limits the extent to which changes can occur.

Under an earlier system, open positions reverted to the Director for reconsideration, and this model may need to be re-examined. Given our organization’s need for responsiveness to ever-changing needs, refilling of positions (or allocation of new positions) should be based on established criteria and our system should have sufficient flexibility to allow realignment when necessary.

Recommendation:
When positions are vacated, funding will revert to the Director. Requests to fill or refill a position will be drafted in concert by the group of leaders most directly impacted by the position, such as Program leaders, staff chairs/area administrators, and/or department heads. Requests will be reviewed by the Director and his/her Cabinet (or other advisory mechanism) in relation to the criteria outlined below, and funds/FTE allocated to the organization’s highest priorities. The criteria would strongly influence whether the position should be structured as tenure/tenure track or fixed/recurrent term. Criteria should include (but necessarily limited to):

- Demonstrated Needs
  - Assessed at county, area and statewide levels using organizational guidelines and processes to ensure equity and consistency, with flexibility to recognize local and programmatic distinctions
  - Reflect demographics and population/societal trends, economic conditions and contributors to economic base, and other secondary data
  - Consider county/unit political or operational issues, and the organization’s commitment to long-term relationships

- Ability to Support
  - Stability of funding for position’s salary and OPE
  - Ability or willingness of county/department/center (etc) to provide S&S (see Support Levels for County-base Faculty, below)
  - Capacity/opportunity to leverage funding

- Program Integration
  - Fit of the position within the vision/mission of a program area or areas
  - Potential for cross-program collaboration and/or consent among program areas regarding priority of position
  - Priority of position within program’s/county’s staffing plan

- Impact Potential
  - Well-defined outcomes with clearly articulated implications for positive behavior change and/or economic/environmental/social impact
  - History of program success
  - Effective and productive partnerships/collaborators
Impacts/Consequences:
A more coordinated approach to staffing will allow Extension to focus its resources on organizational priorities, to address gaps in service that develop when faculty members resign or retire, and to be responsive to changing demographics and needs. The proposed process would make “core” Program funding less certain, but only to the extent that the program area cannot demonstrate ongoing justification for its staffing. Program areas will be more likely to engage in regular staffing plan discussions and ongoing needs assessment, as this will better position them for success in the resource allocation process.

Timeline:
The Director, in consultation with the Extension Cabinet or other advisory body, should refine these recommendations during the remainder of this biennium, and implement the policy at the beginning of the next biennium. A team should be assembled to compile needs assessment tools and techniques, and a more consistent needs assessment process implemented in the fall of 2010 to inform work plans for 2011. Program areas and county offices should develop staffing plans by the end of 2011, to inform placement of faculty resources thereafter.
Tenure, rank and academic home
Situation:
Tenured faculty are expected to provide cutting edge, creative programming that links unbiased research information with best practices and applied science to address issues/needs, within the context of our land-grant university mission. Renewable-term faculty provide Extension with the flexibility to respond to time-sensitive issues through grants and contracts. Administrative and professional faculty play an integral role by handling day-to-day administration, coordination, and management of programs.

In 1995, OSU Extension faculty members were integrated into departments and units within colleges. Many faculty thrive in an academic department while others find the conflicting demands on their time overwhelming. Extension stakeholders may appreciate our connection to academic departments but may not fully understand or appreciate how these demands may impact our ability to address their demands.

Recommendation 1:
Keep the majority of faculty in tenure/tenure-track positions to retain Extension’s distinction of expertise and credibility.

- Clearly articulate expectations for tenured Extension faculty to provide leadership for team projects, mentoring, issue initiatives, and grant endeavors with the expectation for leadership increasing as faculty progress in rank. Start hiring now to build faculty capacity for leadership and flexibility.
- Intentionally advocate and educate at the Provost level, and throughout the university as needed, to increase the understanding of Extension and the land-grant mission and gain a greater respect for the diversity of Extension’s impact and forms of scholarship.
- Incorporate or enhance processes for mentoring new faculty to ensure greater success in promotion and tenure and other aspects of their positions.
- Continue to house faculty in academic departments.
- Continually review and update position descriptions to reflect changing needs and expectations of faculty.
- Use funding authority to insure that departmental expectations are consistent with Extension expectations, as articulated in position descriptions.

Recommendation 2:
Implement thoughtful staffing plans that use a combination of tenure/tenure-track and non-tenured positions to provide the highest levels of service to clients providing flexibility to address budget fluctuations.

- Reward faculty for their efforts, regardless of rank.
- Work with the university to create multi-year, renewable contracts.
- Provide a promotional track for non-tenured faculty.
- Clarify responsibilities of county, area, and state faculty position descriptions to address potentially divergent expectations of multiple staff chairs and stakeholder groups.

Impacts: The tenure and rank of our Extension Faculty provides a distinct, competitive advantage for recognized expertise and credibility with our stakeholders and university colleagues. Our faculty is our most precious commodity for accomplishing our Extension mission. Scholarship requirements of
faculty stimulate the creation and sharing of relevant, innovative solutions or educational programs that positively impact the lives of Oregonians. By incorporating systems for mentoring new tenure-track faculty and for providing promotion of non-tenured faculty, Extension builds in a process for retaining the most productive and successful faculty. A connection to an academic home provides a mechanism for accessing research and building collegial relationships resulting in greater program integration, access to grants, and application of best practices.

**Consequences:** The removal of our tenure/tenure-track system would diminish the credibility of Extension. Without a mix of tenured and non-tenured positions, Extension is not positioned to be the nimble, flexible, and scalable organization it must be for its economic future. Placing faculty in an Extension home, rather than an academic home, poses the risk of creating a “lower tier” faculty with no departmental connections.

**Timeline:** Clarifying expectations for tenured faculty can occur 6 months to 1 year. Staffing plans, position descriptions, and options for fixed term positions can be phased in during the biennium. The remaining recommendations are current and ongoing.
Communication and learning technology

Situation:
Extension education in the 21st century must meet a variety of public needs and must be communicated in a variety of ways to reach people of different abilities, learning styles, and cultures.

In the near future, more residents will expect to receive information that is portable, brief, graphic, current, and immediately available. Fewer residents will require face-to-face, on-location interaction with experts. And evolving demographics will underscore the need for more diverse educational outreach beyond 24/7 access.

In order to meet these growing needs and make OSU Extension accessible and relevant in 21st century, we will need to make a conscious investment in communications and learning technology to develop new tools, to develop new content, and to engage new learners.

Recommendation 1:
Provide all Extension county offices the technical tools and capacity they need for collaborative workspaces, distance education, and outreach to mass audiences.
  • Upgrade bandwidth and fiber-optic connections where possible in Extension offices and branch stations
  • Standardize communications equipment to streamline virtual meetings and workspaces
  • Provide faculty and staff across the state with tools and training to use communication technology effectively
  • Invest in Extension Computer Technology Unit to provide technical tools and support
  • Create a statewide IT network of staff and faculty, made sustainable through targeted hiring, retraining, and recognized responsibility

Recommendation 2:
Develop Extension education and communications that take advantage of new technical tools.
  • Create a statewide communications team to help develop educational content using appropriate media and learning technologies for a variety of audiences
  • Engage opinion leaders so they receive Extension information in a form that is easy for them to re-distribute to constituents, students, followers, etc.
  • Use our content management system (Drupal) to make statewide content accessible in every county
  • Develop content for mobile platforms (PDAs, etc) that can be used in small chunks or aggregated into larger educational materials
  • Create educational material that can be delivered through new social media (podcasts, Twitter, YouTube, etc)

Recommendation 3:
Engage new learners to make informed decisions using the knowledge available to them through Extension.
  • Seek opportunities to create Extension-based non-credit online learning experiences through partnerships with Ecampus
  • Invest in Extension’s capacity to serve new clients through the eXtension “Ask an Expert” database.
  • Develop virtual Extension offices to serve online communities
• Recognize faculty contributions to online learning as service and scholarly work
• Create opportunities to partner with broadcast media to deliver expert information as a public service in a variety of outlets (TV, radio, news).

Recommendation 4:
Make Extension education relevant for diverse learners (see also “Local Presence”)
• Create capacity for both face-to-face and online educational outreach to engage local clients with extensive online resources.
• Develop educational communications that can be used in multiple ways to achieve multicultural, multigenerational outreach and engagement
• Recruit new faculty and staff who can help Extension engage in diverse learning styles, educational communications, and cultures.

Recommendation 5:
Increase communication skills of faculty and staff
• Encourage use of Extension how-to’s to help faculty publish learning material, work with reporters, use social media, take better photographs and videos, and design more effective educational content.
• Provide regional communications training
• Develop a mechanism (for example, an online periodical) to tell the Extension story

Impact:
As demands grow and Extension’s footprint shrinks, we will need to focus more of our education delivery on larger, mass audiences, and less on individuals or small groups.

Applying new technology, Extension’s educational communications will increase public access to new knowledge, create more effective accountability materials, and provide instructional design across all programs. With a more conscious investment, OSU Extension will have the capacity to use new tools to tell our story and engage new learners.

Timeline: ongoing
Marketing and brand identity

Situation:
Marketing Extension has two overlapping purposes. First, marketing means identifying a need and filling it. Second, marketing means promoting a positive brand identity. By doing a good job of filling a need, it is much easier to promote a positive identity.

Recommendation 1:
Increase Extension’s capacity to measure and respond to changing community needs (see also “Local Presence”)

- Carefully craft a position description for an Extension Marketing Leader that combines both needs assessment and brand identity
- Develop a comprehensive marketing plan that increases the organization’s ability to identify and fill local and statewide needs
- Develop efficient assessment tools that help teams of faculty address changing needs
- Coordinate needs assessments and build collaborative, team-based responses

Recommendation 2:
Make OSU Extension readily identifiable on campus and across the state

- Work with University Advancement to develop a consistent brand identity across the state
- Use the opportunity of Extension’s Centennial to promote awareness
- Do not bury Extension’s name or identity under O&E
- Encourage use of the Extension marketing toolkit - templates, talking points, and logos, available online.
- In all communications, refer to “OSU Extension”, not [your county] Extension;
- Purposefully include one-minute overview of Extension in all public presentations

Recommendation 3:
Make better use of Drupal content management system to standardize Extension’s online image and content.

- Assign responsibility at the county level for maintaining each county Web site as a virtual front office.
- Keep county pages up-to-date; purge past events and dated material; regularly connect to content mgt system to access new information and learning materials.

Impact:
Now more than ever, OSU Extension needs a clearly defined identity. With a new organizational structure, even long-time supporters may need help understanding that Extension is still here and serving communities throughout Oregon. And introducing a new structure provides an opportunity to engage new clients and partners.

Timeline: ongoing
**Budget allocation and accountability**

**Situation:**
The current model of allocating most of Extension’s budget directly to Programs and Colleges creates a lack of flexibility within the organization to fund new innovative cross-program initiatives.

**Recommendation:**
Create a budget allocation model that continues our core base programming model while retaining funds centrally for innovative flexible programming (see Innovation Element) and provides greater program accountability for use of funds.

- The Director of OSU Extension Service will retain a pool of funds to address new, innovative and flexible programs, planned in consultation with the Extension Cabinet (or other advisory group).
- Core program budgets would be based upon successful implementation and documented impacts of approved Plans of Work that include investments for innovative, cross-program integration.
- Program leaders would be held accountable for impact documentation and program area responsiveness to new and emerging needs.
- Program leaders would lead a broad based planning and reporting process to include program, colleges, departments and state and county based Extension faculty.
- All Program leaders would retain their current appointments within their respective College with direct accountability to Extension Administration pertaining to their budget allocation and ability to successfully complete their POWs.
- Program Leaders are encouraged and expected to work collaboratively to address statewide staffing plans when allocating budgets.
- Innovative programs would be funded on a short-term, 1-3 year time period and could be renewed based upon success of the program and future needs.

**Consequences/Impacts**

- Directs OSU Extension dollars into a competitive proposal process for new innovative programming, linked to needs identified through county and state needs assessments.
- A portion of funds may be allocated from core/base programming and made available for new flexible innovative programs.
- New employees hired and funded by these flexible innovative dollars would preferably be hired on a fixed-term appointment with a clearly identified plan for completion.
- Increase ability of Extension Administration to strategically allocate limited program dollars while freeing up resources for flexible innovative programs.
- Program Leaders would have academic homes in colleges and report to deans but would be held strongly accountable for use of Extension funds according to a Plan of Work approved by the Director. This would create stronger accountability of Extension appropriations among program areas and across departments and continue to benefit from existing relationships and appointments.

**Timeline:**
These recommendations could start to be implemented immediately and phased in within the next two biennial budget cycles.
Revenue generation
Situation:
Traditionally Extension programs have relied on revenues from state, federal, and county funding. Increasingly, these three revenue sources are no longer adequate for current level of Extension programs and services. Staffing for programs has declined from 240 positions to 175 positions in just a few years. Simply through attrition, Extension will shrink without design. Alternately, with intentional adoption of new sources of revenue, Extension can grow new programs and face future budget oscillations with resilience.

The faculty panel considered a wide variety of ideas for revenue generation, outlined below. We believe this is a small first step in a larger process to develop and implement new mechanisms to diversify Extension funding. Therefore, we strongly endorse the formation of a future committee to evaluate in detail the full opportunities and consequences of the following recommendations.

Recommendation 1:
Create a task force to develop a new, effective business model for Extension
- Develop business plans for local and regional units that are part of the overall business model.
- Determine the market value of existing Extension programs and identify opportunities to add market value.
- Evaluate community college model to determine whether it is a valid comparator (e.g. combination of service district support, with tuition and fees, donations and grants).

Recommendation 2:
Seek partnerships to enhance revenue generation
- Actively engage in the outreach component of university research.
- Build partnerships with NGOs, Community Colleges, local governments, businesses through contracts, project collaborations, or physical co-location.
- Seek Industry sponsorships for educational programs or workshops.

Recommendation 3:
Develop a plan to more closely align fees to the market value of Extension programs
- Determine which activities can and should generate income, considering public good versus private good.
- Maintain flexibility to serve under-served clients who may not be able to pay higher fees.
- Develop process to standardize (within reason) fees across state. (As an example, fees for Master Gardener programs vary from $35 to more than $400).
- Show transparency at local level to show/justify experiences/fees.
- Implement subscription fee to have full access to Extension communication products.
- Explore possibility of dedicated taxes in the form of user fees for particular sectors, such as timber harvest taxes.
- Remove barriers that make fee collection difficult (e.g. facilitate the payment by clients with charge cards).

Recommendation 4:
Transform Extension educational materials and programs with added market value
- Recreate traditional Extension programs into non-traditional learning “Institutes”
• Partner with E-Campus to transform Extension programs into “for-credit” classes or certification for professionals.
• Consider sponsors for online product development and maintenance, if there is to be no cost to client.

Recommendation 5:
Increase the level of grant funding to foster innovative Extension programs and improve upon current programs.

Increase administrative support for grants
• Communicate to the broader university and stakeholder community that Extension has proven expertise for coordinating and delivering required broader impacts.
• Designate a regional-based faculty member or team to take leadership in grantsmanship.
• Establish a “community of practice” grant writing team
• Plan fewer, well coordinated proposals rather than submitting competing multiple grants for one RFP
• Provide training for support staff on managing grants and contracts.
• Improve efficiencies with the Sponsored Programs and Contracts and Agreement office.
• Create a pool of start-up revenue to develop fund-generating online education products

Increase capacity for developing grant proposals
• Provide formal assistance in grant development, including professional grant writers for larger proposals.
• Increase the capacity of Extension faculty to write grants through a combination of grant writers/coordinators, training and mentoring.
• Expect tenured faculty to assume greater leadership in grant writing and revenue development teams.

Engage new partners in grant development
• Return some overhead to cover county costs associated with grant development and management and to keep funds at county level.
• Designate time in position descriptions for faculty to be successful at grantsmanship.
• Provide incentives to participating in and obtaining grants (such as sabbatical, training, latitude to grow new programs).
• Develop guidelines to establish expectations for work, responsibilities, and outputs.
• Integrate Extension/Outreach with Research re grant writing (see also “Collaboration Among Statewide Programs”)

Recommendation 6:
Facilitate revenue generation from endowments and private giving
• Coordinate a statewide private development effort; partner with OSU Foundation, Oregon Community Foundation, others.
• Provide training for endowments and/or hire endowment developers
• Facilitate alumni fund raisers
• Develop more active participation in OSU’s Capital Campaign
Recommendation 7:
Enhance public support for Extension.
- Increase State Legislative funding for critical issues through policy option packages
- Support OSU lobbying at the state and federal levels with success stories that demonstrate public return on investment
- Investigate the possibility of increasing the number of service tax districts

Recommendation 8:
Provide incentives to faculty for revenue generation.
- Consider the option of soft-funding a portion of some positions (e.g. 75% - 25%, as in CAS)
- Allow Extension faculty to pursue consulting with reduced FTE.
- Acknowledge successful revenue generation in promotion and tenure.
- Enhance flexibility for professional development

Impacts/Consequences
Alternative forms of revenue will become an increasingly important component of Extension’s funding mechanism in the future. Extension faculty are well suited as PI’s on large grants that increasingly require an outreach and education (broader implications) component. We have many valuable educational products, but our existing clients are accustomed to receiving them at little or no direct cost. Sponsorships, fund-raisers and private giving/endowments all offer opportunities to diversify and enhance our business model. All of these efforts require careful thought and planning to ensure faculty and staff have the training and support needed to implement them properly, that structures are in place to ensure they operate smoothly, and that they are consistent with our organization’s mission and goals.

A full analysis of revenue opportunities and consequences was beyond the scope of the Faculty Panel’s charge. We strongly recommend this be the focus of a separate committee.
Conclusion
The Extension Faculty Advisory Panel was asked to provide options for the Extension Director to set a course for recovery following significant budget cuts.

Within the suite of choices the panel has developed, there are options that will strengthen Extension’s capacity to respond to the state’s highest priority needs. Extension will:

- maintain a local presence in each county, with programs that respond to local needs
- streamline administration to allow the organization to work efficiently and effectively at all levels
- challenge our tenured and tenure-track faculty to lead innovative problem-solving teams
- build flexibility into position descriptions and hiring to respond to emerging new issues
- craft position descriptions and lines of reporting to reduce conflicting demands on faculty and staff
- challenge programs to work together on issues that demand integration of expertise and partnerships within and beyond the university
- plan targets for successful completion of some projects in order to create opportunities for additional innovation
- provide new directions for Extension education at a reduced budget and with resiliency to face future budget oscillations

Next steps
The Faculty Advisory Panel encourages ongoing dialogue among Extension faculty, staff, administrators, and stakeholders, as Extension continues to evolve in response to emerging opportunities and challenges. The Extension Director will use the ideas in this report to frame transformational change within OSU Extension. As options move forward to implementation, this Faculty Panel will continue to be available for review and consultation with the Director.

Acknowledgements
The faculty advisory panel was appointed to address the re-set phase of change, positioning Extension for recovery and future growth. The panel was charged to engage stakeholders and to develop and test a range of structural and administrative options that will position Extension to best serve Oregon and provide a more stable and sustainable organization.

Faculty Advisory Panel for Organization Transformation
Debbie Maddy (chair), Extension Administration
From October 2009 through February 2010, the faculty panel interacted with Extension stakeholders, gathering input and ideas in a variety of ways. The following interactions form the basis of this report:

Surveys and discussion groups
- Extension Leadership and ECAN/MECAN input - 10/20/2009
- County Commissioners/Judges input - 11/18/2009
- Support and Program Staff input - 12/1/2009
- Extension Leadership input - 12/2/2009
- Faculty Survey results - 12/10/2009

Roundtable Discussions
- Newport: 1/25/2010
- Corvallis: 1/26/2010
- Salem and Baker City: 1/27/2010
- Prineville: 1/28/2010
- Beaverton: 1/29/10
- Grants Pass: 2/01/2010

Webinars
- Organization wide – 1/25/2010 (archived)
- County Commissioners – 2/19/2010 (archived)
- Organization wide – 2/24/2010 (archived)